

Oracle® Documanage

# Documanage Installation Guide

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# Documanage documentation roadmap

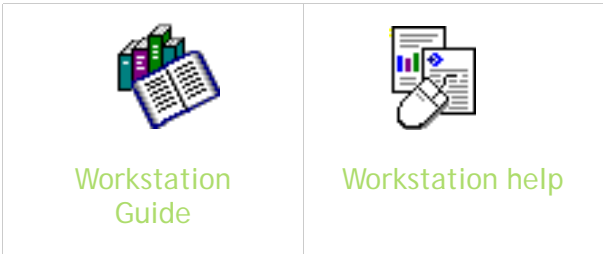
## Administrating



## Programming



## Workstation





# Table of Contents

## XIV PREFACE

---

### **xiv Using this manual**

xiv Contents

xvi Conventions

### **xvii Related documentation**

xvii User Documentation

xviii Programming Documentation

### **xix Suggestions**

## 1 INTRODUCTION

---

### **1 In this chapter**

### **2 Getting started**

### **3 Installation requirements**

3 User performance requirements

7 Software and hardware requirements

### **17 Documentation**

### **18 Installation components**

21 Installation files for Windows

22 Installation files for UNIX operating systems

24 SQL scripts

24 Multiple Virtual Storage Scripts

### **25 Additional software**

- 
- 25 Windows Installer
  - 25 Windows Script (Host)
  - 25 MSXML Parser
  - 26 Microsoft Data Access Components
  - 26 Adobe Acrobat
  - 27 Installation order**
    - 27 Documange Database and ODBC Drivers
    - 27 Routers, Servers and Administrative Tools
    - 28 Documange Workstation and Application Programming Interface

## **29 DATABASE**

---

- 29 In this chapter**
- 30 The Documange database**
  - 30 Microsoft SQL Server 2000 Desktop Engine and DMG-Samples
  - 31 Using a production database management system
- 31 Creating the Documange database**
  - 32 Data Definition Language Scripts
  - 32 Installing the Documange Database Wizard
- 41 Documange Database Wizard**
  - 42 Supported Databases
  - 43 Setting up the Documange housekeeping tables for MySQL
  - 52 Setting up the Documange housekeeping tables for Microsoft SQL Server
  - 64 Setting up the Documange housekeeping tables for

Oracle

75 Setting up the Documanage housekeeping tables for Sybase ASE

## **86 Open Database Connectivity interface**

86 Obtaining ODBC Drivers

86 Data Source Names

87 Managing the ODBC interface in Windows

87 Managing the ODBC interface for UNIX Compatible Operating Systems

## **95 SERVICES**

---

### **95 In this chapter**

### **96 Installing the Server, Router and Administrative Tools**

96 Installing the Server Router and Administrative Tools on Windows

115 Installing the Router and Server on a UNIX Compatible Operating System

### **116 Separately Installing Administrative Tools on Windows**

### **118 Full-text search on Windows**

118 Indexing Service Catalog

119 Enabling Full-Text Search

119 Enabling Full Text Search with Documanage

## **121 WORKSTATION AND APPLICATION PROGRAM INTERFACE**

---

### **121 In this chapter**

### **122 Installing the Workstation**

---

**130 The Application Program Interface**

**131 Installing the Application Program Interface for UNIX**

132 Prerequisite software

132 Dmg\_API

**135 CONFIGURING DOCUMANAGE**

---

**135 In this chapter**

**135 Configuring Documange for first time use**

**139 APPENDIX A: DMGSAMPLES**

---

**141 APPENDIX B: WINDOWS AUTHENTICATION**

---

142 Terminology

143 Group Settings

144 General Requirements

145 Server Services Configurations

147 Notes

148 Login Errors and their causes:

# Preface

The Documanager system is comprised of server programs including your database system and the Documanager Router and Server applications and end-user client applications such as the Workstation. Documanager also includes administrative applications used to manage and configure the system.

Currently only the Documanager Router and Server are available for installation on UNIX compatible platforms. The other applications are presently available only for Microsoft Windows 32-bit operating systems.

This guide describes how to install and configure these applications on the operating systems that they are compatible with.

## Using this manual

This *Installation Guide* describes how to install Documanager applications and configure them when they are first used.

### Contents

- ◆ **Introduction**—This chapter describes the Documanager 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.

- ◆ **Database**—The Database chapter describes how to install Documange components and their associated software applications in Documange installations that run exclusively on Windows operating systems. It describes how to create and install a Documange database, how to use ODBC drivers to connect the Documange database to the Documange Routers and Servers for Documange, how to verify a that a Documange Database is working properly, and how to upgrade the Documange database schema.
- ◆ **Services**—This chapter describes how to install the Router, Server, and Administrator applications on Windows and on UNIX compatible operating systems. It describes how to install and configure the Documange Router, Server and Administrator, how to install full text search, and how to separately install the Documange Administrative Tools.
- ◆ **Workstation and Application Program Interface**—The Workstation and Application Program Interface chapter describes how to install the Workstation together with the Documange Application Program Interface on Windows. It also describes how to install the Application Program Interface on UNIX compatible operating systems.
- ◆ **Configuring Documange**—The Configuring Documange chapter describes how to configure Documange in a Windows and UNIX compatible environments. It describes how to start the Router and the Server, how to log in to the Administrator module, set the password for each database (configure Data Source Names), add users in UNIX, and set up a default category. so that you can start the Documange Server. This chapter also describes the options available when setting up the pooffice.ini files and odbc.ini files for both Windows and UNIX compatible environments.
- ◆ **Appendix A: DmgSamples**—The DmgSamples appendix lists the cabinets defined by the DMGSamples database and a brief description of

each: DMGSamples contains a sample Documanager housekeeping database as well as several line-of-business (LOB) tables and Documanager volumes created in BLOB database storage. You can use DMGSamples to verify the correct installation and operation of Documanager.

## Conventions

This guide provides consistent typographic conventions and keyboard formats to help you locate and interpret information easily. These conventions are provided below.

Convention	Description
<i>Italics</i>	Command, dialog box, icon, and field names
San serif font	Directory, folder, and file names
<b>1 Numbered lists</b>	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 Documanager. This documentation includes user documentation and programming documentation.

### User Documentation

#### Workstation Guide and Workstation Help

The Workstation (or client) is an end-user application that works with the Administrator application to manage documents. The *Workstation Guide* and the *Workstation Help* describe how to use the Documanager Workstation application to perform document management functions, including annotating, importing, exporting, e-mailing, and printing documents. This guide also describes how to access Documanager workflows. The *Workstation Guide* and the *Workstation Help* are automatically installed with the Workstation.

#### Administrator's Guide

The Documanager administrative applications work with the Workstation application and the Documanager database to manage and configure the Documanager system. The Database Administrator's Guide describes how to use the Documanager Administrator, the Workflow Designer, the Service Controller MMC Snap-in, the Document Migration Tool and the Command-line Import Tool. The Administrators Guide is automatically installed with the Administrator and Server applications.

## **Database Administrator's Guide**

Documanager provides you with a document-management infrastructure that can use any of the most popular SQL database management systems. The Documanager database is part of this infrastructure. The Database Administrator's Guide describes how you make the Documanager database run the most efficiently on your database management system.

## **Programming Documentation**

Using Skywire's Documanager for Oracle document management system you can implement flexible, robust, and scalable solutions for enterprise document management and workflow. Implementing these solutions depends on the ability of programmers to write custom additions, interfaces and applications to the system. This document describes the Documanager API and Active X controls provided with Documanager to build such extensions and client applications.

## **Documanager API Help**

The Documanager API Help is a cross-platform HTML-based Help system provided with the Documanager API (DmgAPI). It provides a complete and definitive guide to the DmgAPI.

The Documanager API (DmgAPI) gives programmatic access to Documanager from any supported client configuration. It does this by managing communication between a Documanager client application and the Documanager Servers and Routers. The DmgAPI provides a portable multi-platform communications solution, since it consists of a C-language callable library of functions that provides access to the full range of Documanager capabilities from many popular operating system platforms and programming environments.

Refer to your product distribution media for the DmgAPI directory containing the DmgAPI HTML pages.

## **Programmer's Guide**

This Programmer's Guide is a reference for programmers building applications which will interface directly with Skywire's Documanager for Oracle document management system. It describes a set of ActiveX controls provided with the system to accomplish critical client component functions. The controls provide a Application Programming Interface (API) on Windows that allows client software to communicate with and request functions of a Documanager server.

## **Suggestions**

We welcome your comments, suggestions, and concerns about this manual or any Oracle Software publication. Send your comments to:

Skywire's Documanager for Oracle Software Technical Documentation  
3353 Peachtree Road NE, Ste 800  
Atlanta, Georgia 30326

# ***Introduction***

This Installation Guide shows you how to install and configure a Documange Document Management System. It describes how to:

- ◆ Install Documange on Windows machines and on machines that run several different types of UNIX.
- ◆ Integrate your Documange installation with existing Line of Business (LOB) databases.
- ◆ Install utilities that migrate and insert documents into a Documange system and perform full text searches of Docucorp Compound Document (DCD) files.
- ◆ Set up API Software Development Kit (SDK) that allows you to customize workflow within Documange.

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

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## **In this chapter**

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

- What do you do before you install Documange?
- What installation requirements (operator skill levels, hardware platforms, and prerequisite software) must be met for support under a Skywire's Documange for Oracle Software maintenance agreement?

## Introduction

### Getting started

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- 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 Documanager and what does it do?
- In what order should the Documanager components be installed?

## Getting started

Before you install Documanager:

- ◆ Make sure that you understand and agree to the license terms for the software.
- ◆ Review the “Installation requirements” on page 3 and verify that your can support a Documanager installation. If these requirements are not met, Skywire’s Documanager for Oracle Software will be unable to provide you with support.
- ◆ Review the latest information on your software:
  - ◆ The *Product Bulletin* 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 Skywire's Documanager for Oracle Software maintenance agreements. The requirements include operator skill levels, hardware platforms, and prerequisite software. Minimum and recommended hardware platform configurations are described.

## User performance requirements

Documanager requires three types of users: Administrators for Documanager and its databases, Users for the Documanager Workstation, and Developers (programmers) for the Documanager API (DmgAPI). User roles and requirements differentiate between users with different responsibilities since they use different applications in the Documanager product suite.

## End-User roles and requirements

End-users be able to perform basic operating system tasks and meet entry level requirements, including:

- ◆ 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

## Introduction

### Installation requirements

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- ◆ 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

### Administrator roles and requirements

An Administrator must fulfill the roles and requirements of an end-user, and must also be able to perform intermediate and advanced operating system tasks, including:

- ◆ Installing, removing, and setting up applications
- ◆ Identifying general hardware, application, system, and network errors
- ◆ Accessing, preserving and transmitting log files as requested by Skywire's Documanager for Oracle Software 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 7.
- ◆ 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 (NT) Services, for example) as required
- ◆ Locating and interpreting errors in application logs and system event logs
- ◆ Locating and modifying initialization (.ini) files
- ◆ Creating and editing registry keys on Windows
- ◆ Configuring Users, local Groups, and global Groups for individual machines and across network domains
- ◆ Modifying permissions and authorities for files and directories
- ◆ Stopping, starting, and configuring database management servers

Administrators must also be able to perform general hardware tasks, including:

- ◆ 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)
- ◆ Setting up and troubleshooting scanners, printers, and optical devices
- ◆ Removing and replacing major components (hard drives, CD-ROM drives, video boards, RAM cards, power supplies)
- ◆ Performing minor hardware repairs and preventive maintenance

## Introduction

### Installation requirements

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- ◆ 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 end-users. They 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
- ◆ Understanding how supported operating systems implement Remote Procedure Calls (RPCs)
- ◆ Understanding Open Database Connectivity (ODBC)
- ◆ Using C-language callable subroutine libraries from the language they are using to develop applications
- ◆ Using visual and non-visual ActiveX controls on 32-bit Windows operating systems.
- ◆ 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 Documange applications and to perform related tasks.

Application or Task	Required User
Use a Workstation application to retrieve, display and import documents	End-user
Perform the procedures and use the features described in the Workstation Guide	End-user
Installation and configure of all Documange applications including the Workstation	Administrator
Configure hardware components, including storage	Administrator
Examine and modify database tables using database tools	Administrator
Perform the procedures and use the features described in the Administrator Guide	Administrator
Develop new applications using the components in the Documange SDK	Developer

## Software and hardware requirements

The hardware and software described here only includes what is required by the Documange applications. It does not include the hardware and software required or recommended by the operating system vendor. Skywire's Documange for Oracle software 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.

## Introduction

### Installation requirements

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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 load that it supports, including the type and size of documents being processed. For instance, rendering Metacode documents with a 24-bit color depth on the server requires more server memory for fewer workstation connections.

---

**CAUTION:** These recommendations are not intended as guidelines for high-volume production systems. They are for installing and running a workgroup with fewer than ten users, and they assume that the systems are not running other applications. Larger systems should be set up while working with Skywire's Documanage for Oracle Software Services and Technical Support. The number of users, the amount of data, along with usage profiles and their impact on system operation should be considered.

---

## Workstation and Administrative applications (each)

The Workstation and Administrative Applications can run on Microsoft Windows operating systems with Intel compatible hardware. They have the software and hardware requirements described here.

### *Windows software requirements*

Normally, the Workstation component is installed on End-user workstations by itself. However, the Workstation and Services applications can be installed on the same machine to test an installation and to perform trouble shooting.

- ◆ Windows 2000 Professional (NT5), XP Professional (not the Home edition)
- ◆ The latest service packs for each operating system are highly recommended.
- ◆ No additional software is required: All support libraries are installed or updated by the Documanage installers.

### ***Windows hardware requirements:***

Processor	Intel-compatible; 256-MHz or faster Pentium III-or-better processor required; 512-MHz Intel Pentium/Celeron family, AMD K6/Athlon/Duron family, or compatible processor recommended
Memory	128 MB available RAM or more recommended (64 MB minimum supported; may limit performance and some features)
Hard Disk	40 MB of available hard-disk space required for installation (hard-disk usage will vary based on configuration)
Monitor	Recommend 19" monitor or better at 1024 x 768 resolution or better for viewing and working with documents using Workstation software
Networking	Network adapter for the type of network to which you wish to connect, and access to an appropriate network

### **Server and Router applications (each)**

The Server and Router Applications can run on Microsoft Windows, Linux, AIX and Solaris operating systems and Intel compatible hardware.

### ***Windows operating systems***

## Introduction

### Installation requirements

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Documanage Server and Router 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 for each operating system are highly recommended.
- ◆ No additional software is required: all support libraries are installed or updated by the Documanage installers.

## 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; multi-processor systems are fully supported by a multi-threaded Server
Memory	Router: 50 MB available RAM or more. Server: 384 MB available RAM or more (256 MB minimum supported; this may limit performance and the availability of some features)
Hard Disk	Router: 80 MB of available hard-disk space is required for installation (Hard-disk usage will vary based on the configuration.) Server: 100 MB of available hard-disk space is required for installation (Hard-disk usage will vary based on configuration.)
Peripheral	Additional peripheral storage (hard disk or other mass storage or networked storage) is required for all document storage.
Networking	Network adapter appropriate for the type of network to which you wish to connect, and access to an appropriate network

## *Linux operating systems*

Documanage Servers and Routers 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.
- ◆ All current fixes are required for each kernel release.
- ◆ The latest Linux kernel build announcements are available at:  
<<http://www.spinics.net/lists/announce-kernel/>>

## Introduction

### Installation requirements

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- ◆ No additional software is required:
  - ◆ Free DCE/RPC for Linux is supplied in the libdcerpc.so.0.0.1 file packaged with your installation. It incorporates modifications that allow Documanage to run with the latest versions of Linux.
  - ◆ ODBC and 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	Router: 50 MB available RAM or more recommended Server: 384 MB available RAM or more recommended (128 MB minimum supported; may limit performance and some features)
Hard Disk	Router: 80 MB of available hard-disk space required for installation (Hard-disk usage will vary based on configuration.) Server: 100 MB of available hard-disk space required for installation (Hard-disk usage will vary based on configuration.)
Peripheral	Additional peripheral storage (hard disk or other mass storage or networked storage) is required for document storage.
Networking	Network adapter appropriate for the type of network to which you wish to connect, and access to an appropriate network

## ***AIX operating systems***

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

### **AIX software requirements:**

- ◆ AIX 4.3 or later (for pSeries processors)
- ◆ All current fixes are recommended.
- ◆ Additional Software Required:
  - ◆ Encryption Support: /usr/lib/libcrypt.a (Encryption 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.

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- ◆ IBM DCE/RPC for AIX  
(see <http://www.ibm.com/software/network/dce/>)
  - ◆ libdce.a (IBM DCE main library)
  - ◆ libdcephthreads.a (IBM DCE support library)
  - ◆ libdcelibc\_r.a (IBM DCE support library)

## Introduction

### Installation requirements

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#### **AIX hardware requirements:**

Processor	IBM pSeries supporting required AIX versions
Memory	Router: 50 MB available RAM or more recommended Server: 384 MB available RAM or more recommended (128 MB minimum supported; may limit performance)
Hard Disk	Router: 80 MB of available hard-disk space required for installation (Hard-disk usage will vary based on configuration.) Server: 100 MB of available hard-disk space required for installation (Hard-disk usage will vary based on configuration.)
Peripheral	Additional peripheral storage (hard disk or other mass storage or networked storage) is required to store documents.
Networking	Network adapter for the type of network to which you wish to connect, and access to an appropriate network

#### ***Solaris operating systems***

Documanage Servers and Routers running on the Solaris operating system have the following software and hardware requirements.

#### **Solaris software requirements:**

- ◆ The Documanage server and router run on SunOS 5.7 (Solaris 7) or later.
- ◆ All current fixes are recommended.
- ◆ Recent announcements are available at: <<<http://www.spinics.net/lists/announcekernel/>>>
- ◆ Additional Software Required: IBM DCE/RPC for Solaris; not compatible with Sun's ONC/RPC (see <http://www.ibm.com/software/network/dce/> )

### **Solaris hardware requirements:**

Processor	Sun SPARC Server platform only, supporting required SunOS versions.
Memory	Router: 50 MB available RAM or more recommended Server: 384 MB available RAM or more recommended (128 MB minimum supported; may limit performance)
Hard Disk	Router: 80 MB of available hard-disk space required for installation (Hard-disk usage will vary based on configuration.) Server: 100 MB of available hard-disk space required for installation (Hard-disk usage will vary based on configuration.)
Peripheral	Additional peripheral storage (hard disk or other mass storage or networked storage) is required for document storage.
Networking	Network adapter for the type of network to which you wish to connect, and access to an appropriate network

### ***Databases supported***

**Introduction**  
Installation requirements

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The Documanage Server supports several database management systems, including Microsoft Sybase Adaptive Server, DB2, Adaptive Server Anywhere, and Oracle.

Database/ version	Driver/version
MSSQL 2000	Microsoft Data Access Components (MDAC) 2.8
DB2 7.2, 8.2	IBM DB2 Connect 7.2 or 8.2
Syabase Adaptive Server 12.5	Sybase Adaptive Server Enterprise (ASE) ODBC driver 4.20.00.67 or later
ORACLE 9i, 10g	Latest Oracle drivers (ODBC ver. 9.00.01.08 or later)
MySQL 4.1	Latest MySQL drivers

**Document retention management requirements**

Optional Nearstor Network Attached Storage (NAS) with Snaplock compliance from Network Appliance, Inc. securely stores documents that Documanage has under Retention Management. Nearstor NAS is currently available with capacities between 1 terabyte and 96 terabytes.

**Third-Party Storage Solutions**

Documanage interfaces to third-party storage systems, which augment Documanage’s enforcement of retention policies and provide other managed storage-system benefits. Contact your Skywire’s Documanage for Oracle Software sales representative for the latest listing of storage system versions which have been certified for use with Documanage. Documanage interfaces to the storage systems listed here at this time:

Vendor	Product	Supported Versions*
Network Appliance, Inc.	NearStor/SnapLock	Data ONTAP 7.1 or newer

Vendor	Product	Supported Versions*
EMC, Inc.	Centera	3.0.1 or newer with Compliance (Governance) Edition or CE Plus

\* Skywire’s Documanager for Oracle Software supports newer product versions only if they are backward compatible with the versions listed here.

Plug-in modules interface these storage systems to the Documanager Server. These modules have been developed by Skywire’s Documanager for Oracle software which is solely responsible for their performance.

## Documentation

The Documentation directory in your distribution media contains Acrobat (PDF) files for the Administrator’s Guide, the Database Administrator’s Guide, the Programmer’s Guide, and the Workstation Guide. The directory also contains a folder that contains the HTML files for the Documanager API (DmgAPI) Help. The Administrator’s Guide is installed with the Administrator and Server applications, and the *Workstation Guide* and *Workstation Help* are installed with the Workstation application. “Related documentation” on page xvii in the “Preface” describes this documentation.

# Installation components

Documanage is installed from several collections of components which are generally packaged to be installed together. How the packages are provided to you, and therefore how you install Documanage, varies depending on the operating system that you are installing them on:

Operating System	Component Packaging
Windows	Executables that you run to install applications.
UNIX Compatible	Tape archive (.tar) files which you uncompress (untarr) 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 Documanage licenses.

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

The names of the directories and files should enable you to find the individual components being discussed. Generally, the files are organized into the following categories:

- ◆ Database Components—Database Wizard, Microsoft Data Engine database management system (MSDE DBMS), sample database files, and supporting libraries

- ◆ Database Wizard—The Database Wizard installs the DMANAGE database
- ◆ Microsoft Desktop Engine 2000—The Database Wizard installs Microsoft Desktop Engine (MSDE) 2000 if it does not detect a previously installed instance of MSDE 2000 or an instance of SQL Server 2000.
- ◆ DMGSamples Database—DMGSamples is a database provided for testing new Documanage, installations, training, technical support and troubleshooting. DMGSamples is attached to the default instance.
- ◆ Server Programs—Server and Router with supporting libraries and tools, Full-text Search for DCD files, and Workflow Daemon.
- ◆ Administrative Programs and Utilities—Administrator and Workflow Designer. Database Updater, Document Migration, Document Import utilities, and Diagnostics Tools along with their supporting libraries.
- ◆ Client Programs—Workstation, Outlook add-in, System Tray notifier, and DMGFile along with their supporting libraries.
- ◆ Software Development Kit—DmgAPI libraries, run-times and Help, ActiveX controls and documentation

## Introduction

### Installation components

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- ◆ Docucorp Compound Document Filter for Microsoft Index Server—If you wish to perform full text searches on Docuorp Compound Document (DCD) files, install the DCD filter for Microsoft Index Server supplied as part of your installation. To install Common Objects, run the Common Objects installer that comes with Docuflex Studio. For more information, refer to Full-text Search for DCD Files on page 104.
- 

**CAUTION:** You must install Skywire for Oracle Software's Common Objects on the server before you install the DCD Filter. If you do not install Skywire's for Oracle Common Objects before you install the DCD filter, full text search will be disabled and you will get an error message.

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## Installation files for Windows

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

Installer	Description
DocumangeServices.exe	Installer for full-featured Router, Server and Administrator executables, Full-text Search for DCD files, and Workflow Daemon, with supporting libraries and tools.
DocumangeServicesLite.exe	Installer for a limited Router, Server and Administrator license which omits some features
DocumangeAdmin.exe	Separate installer for the Administrator, the main tool for configuring a Documange installation. Includes the Administrator and Workflow Designer, Database Updater, Document Migration, Import utilities, and Diagnostics Tools, along with their supporting libraries
DocumangeClients.exe	Microsoft installer for the Workstation and its ActiveX Controls. Includes Outlook, DmgFiler, along with the system tray DmgNotifier and supporting libraries.
DocumangeDatabase Wizard.exe	Database configuration application. Includes Microsoft Data Engine database management system (MSDE DBMS), sample database files, and supporting libraries
dmg_api_v_v_b_w_sdk.zip (See Note 1)	Application Program Interface (API) Library and system development kit

## Introduction

### Installation components

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**Notes:** (1) v\_v are the major and minor version numbers, b is the build number, and w indicates that the API is for Windows

## Installation files for UNIX operating systems

If you have a Documanage license agreement for a Linux, Solaris or AIX operating system, you will receive an installation package containing three tar files with names that are formatted as shown here.

File Name Format (see Key)	Contents
dmg_svr_v_v_b_b_p.tar.gz	Full-featured Documanage Router and Server applications
dmg_lite_svr_v_v_b_b_p.tar.gz	A limited license for the Router and Server applications which omits some features
dmg_api_v_v_b_p_sdk.tar	Application Program Interface (API) Library and system development kit

## Key to abbreviations

- ◆ dmg\_svr specifies the documanage server and router.
- ◆ dmg\_lite specifies the lite (restricted license) version of the server.
- ◆ dmg\_api specifies the API library.
- ◆ v\_v specifies major and minor version numbers. For example: 6\_4 is major version 6, minor version 4.
- ◆ b\_b specifies major and minor build numbers. For example: 0\_72 is build 0.72.

---

**NOTE:** The major build number for the Server and Router is always zero.  
The Programming API library only has a major build number.

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- ◆ 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.
- ◆ sdk specifies the software development kit.

### Examples of tar file names

- ◆ dmng\_svr\_6\_4\_0\_37\_s.tar.gz—Documanage server, major version 6, minor version 4, build 0.37 for Solaris.
- ◆ dmng\_svr\_6\_3\_0\_51\_a.tar.gz—Documanage server, major version 6, minor version 3, build 0.51 for AIX.
- ◆ dmng\_lite\_svr\_6\_4\_0\_22\_s.tar.gz—Documanage Lite server, major version 6, minor version 4, build 0.22 for Solaris.
- ◆ dmng\_svr\_6\_4\_0\_72\_l.tar.gz—Documanage server, major version 6, minor version 4, build 0.72 for Linux.
- ◆ dmng\_api\_6\_4\_59\_s\_sdk.tar—Documanage programming API library and software development kit, major version 6, minor version 4, build 59 for Solaris.
- ◆ dmng\_api\_6\_4\_61\_a\_sdk.tar—Documanage programming API library and software development kit, major version 6, minor version 4, build 61 for AIX.

## SQL scripts

Customize the following SQL script prototypes for your installation by changing the entries listed in the comments section at the beginning of each of the files. Use these scripts with MVS DB2 database management systems, which are not supported by the Database Setup Wizard and Database Updater utilities.

## Multiple Virtual Storage Scripts

Text files with Structured Query Language (SQL) script prototypes for manual use on IBM mainframe computers using the Multiple Virtual Storage (MVS) operating system and running a DB2 database management system are listed here.

Script	Description
DB2UpgradeMVS.txt	Updates an existing Documanage MVS DB2 database to work with newer versions of Documanage. A series of sections move the database from one Documanage version to the next.
DB2GrantsMVS.txt	Enables another user logon account. Changes accounts if the account used by the Server to logon to a DB2 database on MVS via the ODBC connection is not the same as the specified owner authID for the tables.
DB2DatabaseMVS.txt	Creates a Documanage database and tablespaces for MVS. Section 1 of 3.
DB2TablesMVS.txt	Creates Documanage database tables and some indices for MVS. Section 2 of 3.
DB2InsertsMVS.txt	Inserts default and initial values into some of the MVS tables. Section 3 of 3

## **Additional software**

The Additional Software folder includes the latest platform-specific third-party software required to support some Documanager features or utilities that run on Windows. Earlier versions of some of this software may already be installed with your Windows operating system, but may not support recent Documanager applications.

### **Windows Installer**

The Microsoft® Windows® Installer is a Windows component. It manages the installation, addition, and deletion of software components, monitors file resiliency, and implements disaster by providing rollbacks. Instmsi.exe is a package that installs or upgrades the Windows Installer. The Windows Installer supports the installation and un-installation of Documanager applications.

### **Windows Script (Host)**

Windows Script Host (WSH) or Wscript does everything that can be done with batch files and more. WSH can run scripts containing Microsoft VBScript or JScript language statements to automate Windows tasks. WSH's modular architecture allows it to support other languages. WSH can automate Windows operations by accessing ActiveX components. The WSH supports the Document Migration utility.

### **MSXML Parser**

The Microsoft XML (MSXML) parser exposes an XML document as a Document Object Model (DOM) which specifies how to programatically

## Introduction

Additional software

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update the content, structure, and appearance of Web documents using scripts or other programs. With an XML DOM, you can load and parse XML files, gather information about the files, as well as navigate through and manipulate those files. The MSXML Parser supports the Document Migration utility.

## Microsoft Data Access Components

Microsoft Data Access Components (MDAC) provide an architecture for accessing information across the enterprise. MDAC contains a group of technologies that interact together to provide applications with a uniform and comprehensive way of accessing almost any data store. It is made up of core Data Access components such as the Microsoft SQL Server™ OLE Database provider and Open DataBase Connectivity (ODBC) drivers. The MDAC provides the latest ODBC drivers for the Server, Administrator and Workflow Designer applications.

## Adobe Acrobat

Adobe® Reader® 7.0 software allows you to view, print, and search Adobe Acrobat Portable Document Format (PDF) files. PDF files represent documents in a way that is independent of the original application software, hardware, and operating system used to create the documents. PDF files display an exact representation of the original document no matter what viewer and/or computer is used. The Acrobat Reader allows you to read, search, and print out the Documange guides.

## **Installation order**

Install your system in steps, making sure that the software installed in the present step is working before proceeding to the next step. This is because the software installed in each step depends on having a set of working software from the previous steps. Skywire's Documanager for Oracle recommends installing software in the following order:

### **Documanager Database and ODBC Drivers**

First create and install the Documanager database. You install ODBC drivers so that the Documanager database can connect to the Documanager Routers and Server.

### **Routers, Servers and Administrative Tools**

After the Documanager database and ODBC drivers are installed, you can install and configure the Documanager Router, Server and Administrative Tools. The Documanager Router is the resource director for Documanager Servers. The Documanager Server is the data manager between the Workstation (Client) and the Databases. The Administrative Tools allow you to configure and manage your system. At this point, you can also install full text search so that you can use Documanager servers to search entire documents stored in your database.

## **Documange Workstation and Application Programming Interface**

The Documange Workstation application is typically installed on machines other than those that run the Server(s), Router(s) and Administrator. It provides a user interface to the Documange Server via the File Room, which organizes and provides access to Documange user interface components.

The Workstation installer also installs the Documange Application Programming Interface (DmgAPI). The DmgAPI provides programmers access to a full range of Documange capabilities from many popular operating systems and programming environments.

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**NOTE:** The suggested order of installation should be followed. However, the installation of each application is described in enough detail so that you can deviate from the suggested order of installation if you wish.

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# ***Database***

This chapter describes how to create a Documanage database. You must create a Documanage database before you install the rest of a Documanage system.

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## **In this chapter**

The information in this chapter helps you answer the following questions:

- Why does Documanage need its own database?
- What does Documanage use the Microsoft SQL Server 2000 Desktop engine and the DmgSamples database for?
- What database management systems should Documanage use for a production database?
- How do you install the Database Wizard and use it to create a Documanage database?
- What can you do if the Documanage Database Wizard does not support your DBMS?
- How do you upgrade the Documanage database schema?
- How do you use Open Database Connectivity drivers to connect the Documanage database to the Routers and Servers for Documanage?

## Database

The Documanage database

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# The Documanage database

Documanage can use your databases to define how your documents are organized within Documanage. This brings document management to databases already installed at your site. Or, if you prefer, you can set up a new database to define how your documents will be organized and stored and set it up to work with Documanage. In either case, Documanage requires its own database to manage documents and workflow projects, links to other databases, Documanage users, and security authorities.

## Microsoft SQL Server 2000 Desktop Engine and DMGSamples

Installing the Documanage Database Wizard also installs the Microsoft SQL Server 2000 Desktop Engine (MSDE 2000) and Skywire Software's DMGSamples database. Installing the Wizard interfaces (attaches) DMGSamples to the SQL Server or MSDE database engine.

DMGSamples contains a sample Documanage housekeeping database as well as several line-of-business (LOB) tables and Documanage volumes created in BLOB database storage. You can use DMGSamples to verify the correct installation and operation of Documanage. Skywire Software Training or Technical Support personnel may also ask you to run troubleshooting tests against it.

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**CAUTION:** Since DMGSamples includes sample databases that provide starting points for your use of a new Documanage system, we strongly recommend that you not change DMGSamples and that you leave it and MSDE installed on your server.

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“Appendix A: DmgSamples” on page 139 lists the cabinets defined by DMGSamples and a brief description of each:

## Using a production database management system

Because of the limitations of MSDE you should not use it to set up a production database. If you wish to run your database system on Windows, you should purchase one of the more capable Windows-based database management system products instead. Such systems include IBM DB2 Universal Database, Oracle, Sybase Adaptive Server as well as the full version of Microsoft SQL Server. You must install a production Database Management System (DBMS) before you run the Database Setup Wizard. Because the Database Wizard runs on a Windows PC, it supports a subset of the databases supported for use with Documanage. A complete list of supported production database management systems can be found in the Documanage Administrator's Guide.

## Creating the Documanage database

To create the Documanage database, you install and then run the Database Wizard. Currently, the Database Wizard application is only available for Windows.

- ◆ You can run Data Definition Language Scripts if the Database Wizard does not support your DBMS. Refer to “Data Definition Language Scripts” on page 32.
- ◆ Installing the Database Wizard—You respond to the prompts from the DocumanageDatabaseWizard executable to install the Database Wizard.

## Database

### Creating the Documanage database

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Follow the steps under “Installing the Documanage Database Wizard” on page 32.

- ◆ Creating a Documanage database—You create the Documanage Database, by responding to the prompts from the Database Wizard. Follow the steps under “Documanage Database Wizard” on page 41.

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**NOTE:** At any time during an installation, you can click *Cancel* to quit the setup, or click the *Back* button (when available) to go back to the previous dialog box to change your previous selections.

---

## Data Definition Language Scripts

If the Documanage Database Wizard does not support your DBMS, Skywire Software can supply stand-alone Data Definition Language (DDL) scripts with which you can translate into an SQL dialect appropriate for your database system. Fully commented prototype scripts for each phase of the set up are available for the IBM MVS DB2 DBMS. These scripts may be the best starting point if you need to customize the set up for your database management system. Refer to “SQL scripts” on page 24 for descriptions of these scripts.

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**NOTE:** Screen captures may differ in colors and/or major/minor version numbers than the installation you run. Unless otherwise noted, the installation procedures and configuration steps remain the same.

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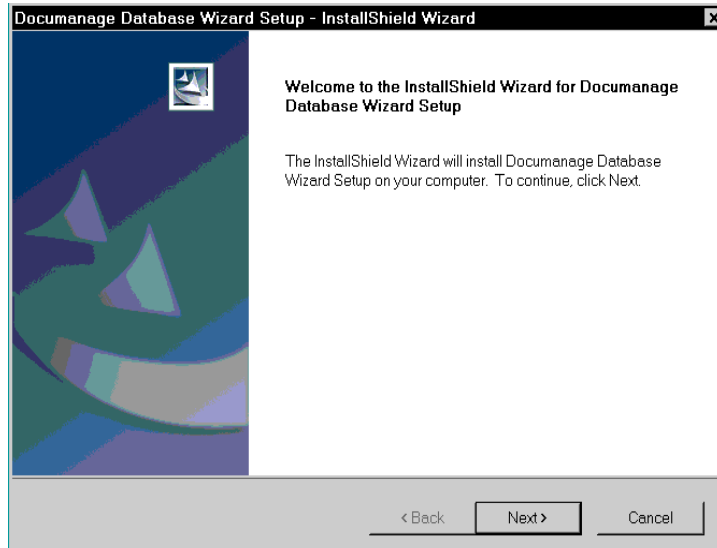
## Installing the Documanage Database Wizard

The Documanage Database Wizard installer installs the Database Wizard, which in turn allows you to create and configure the Documanage

(DMANAGE) database. To install and run the Documanage Database Wizard proceed as follows:

**1 Run DocumanageDatabaseWizard.exe.**

The Extracting Files and Preparing Setup dialogs appear, followed by the *Welcome to the InstallShield Wizard for Documanage* dialog.



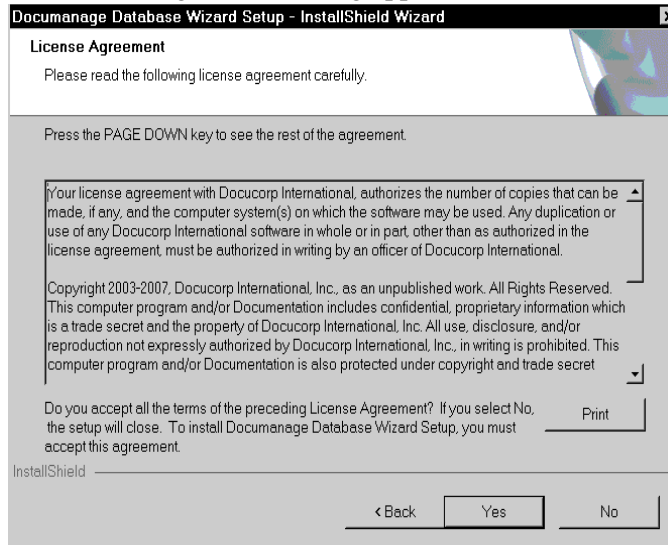
## Database

### Creating the Documanage database

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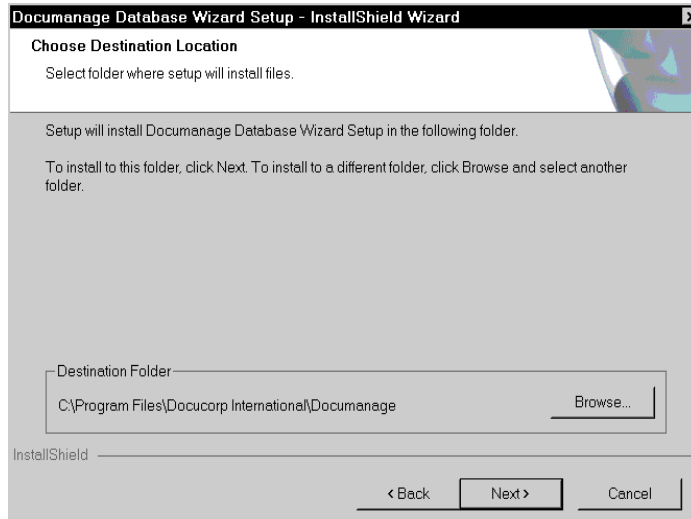
- 2 In the *Welcome to the InstallShield Wizard for Documanage* dialog, click **Next**.

The License Agreement dialog appears.



**3 Click Yes to accept the license agreement.**

The *Choose Destination Location* dialog appears.



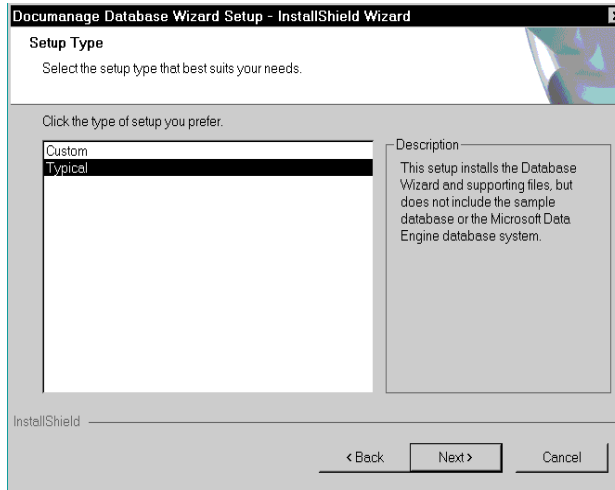
**4 Accept the default Destination Folder or click *Browse* and use the *Choose Folder* dialog to select a folder into which you want to install Documanage.**

## Database

### Creating the Documanage database

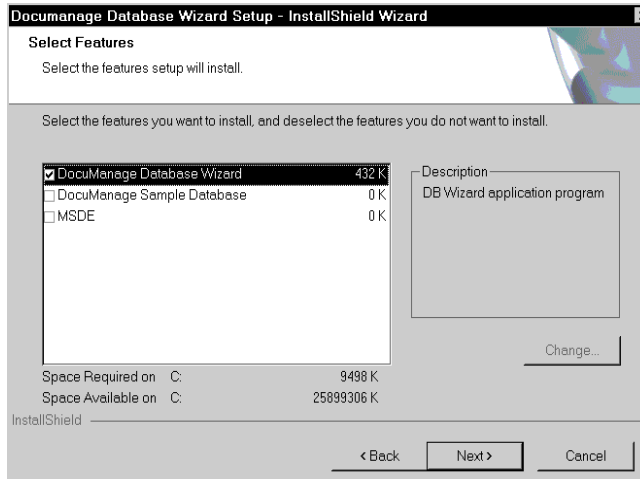
---

#### 5 Click **Next**. The **Setup Type** dialog appears.



The *Typical* installation includes the Database Wizard and all supporting files. A *Custom* installation includes the same components that install with a Typical installation, but also a sample database and/or the Microsoft Data Engine database system. *If you are installing a Typical configuration, skip to step 7.*

6 A *Custom* installation selection dialog:



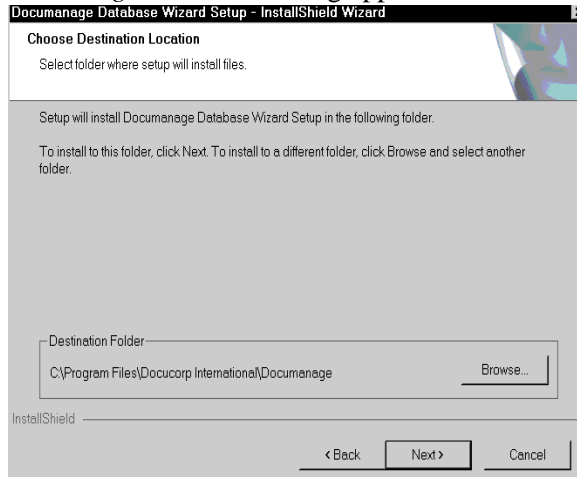
## Database

### Creating the Documanage database

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#### 7 Click **Next**.

The *Select Program Folder* dialog appears.



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**NOTE:** The default installation folder is: ...\\Docucorp International\\Documanage.

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#### 8 Click **Next**.

The setup program installs the components you have selected. An *Installing...* progress indicator appears, showing which components setup is installing.

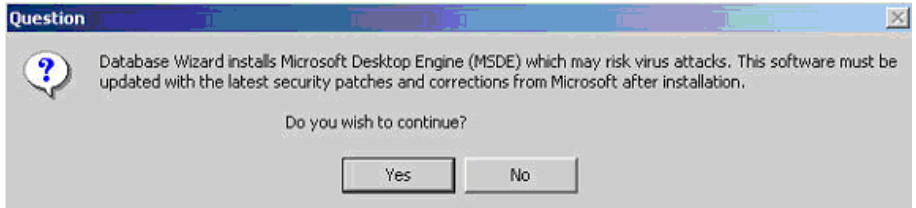
**If you are installing MSDE go to Step 9, otherwise go to Step 12.**

---

**NOTE:** Documanage is the default program folder.

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**9 The MSDE dialog appears:**



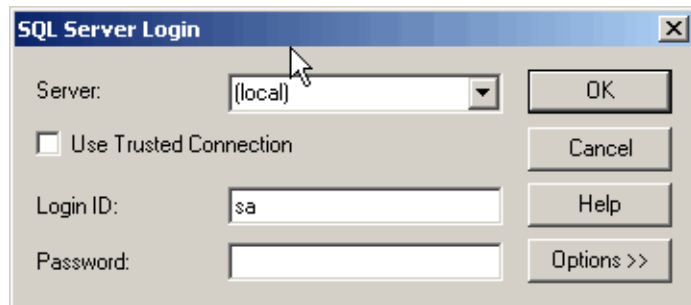
**10 Click Yes to install the Microsoft Desktop Engine (MSDE). Click No to abort the Documanage Database Wizard Installer installation.**

---

**NOTE:** A "Default" instance of MSDE or SQL Server 2000 must be available to allow the installer to install the Documanage DMGSamples database. If a "Default" instance is not available, the installer will install MSDE. If you prefer not to have DMGSamples database installed on your system, contact Skywire Software Customer Service.

---

The SQL Server Login dialog appears.



- ◆ **Server:** The machine that is running the database server.
- ◆ **Login ID:** The login for the Database Administrator to login to the Database Server. For MS SQL Server, Sybase Adaptive Server,

## Database

### Creating the Documanage database

---

Adaptive Server Anywhere, the server default is “sa.” If you select Use Trusted Connection, Login ID becomes unavailable.

- ◆ **Password:** The login password for the database. For MS SQL Server, Sybase Adaptive Server, and Adaptive Server Anywhere, this field should not be left blank. If you select Use Trusted Connection, Password becomes unavailable.
- ◆ **Use Trusted Connection:** With Use Trusted Connection selected, SQL Server establishes connections from this data source using integrated login security, no matter what the current login security mode is at the server.

- 11 **Enter "(local)" or your machine name from the pull-down menu for the Server and "sa" for the Password. If you have a default instance already installed, your password may not be "sa": consult your Database Administrator. Click OK.**

The *Run Database Wizard* message appears.

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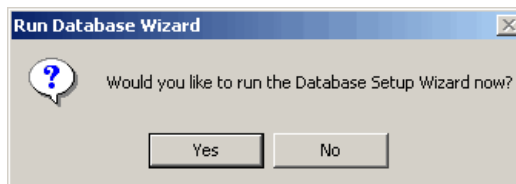
**NOTE:** The Database Wizard executable should only be installed on the machine where your Database Management System is located.

---

---

**NOTE:** The “Trusted Connection” option allows Microsoft SQL Server to authenticate users based on their Windows domain logins.

---

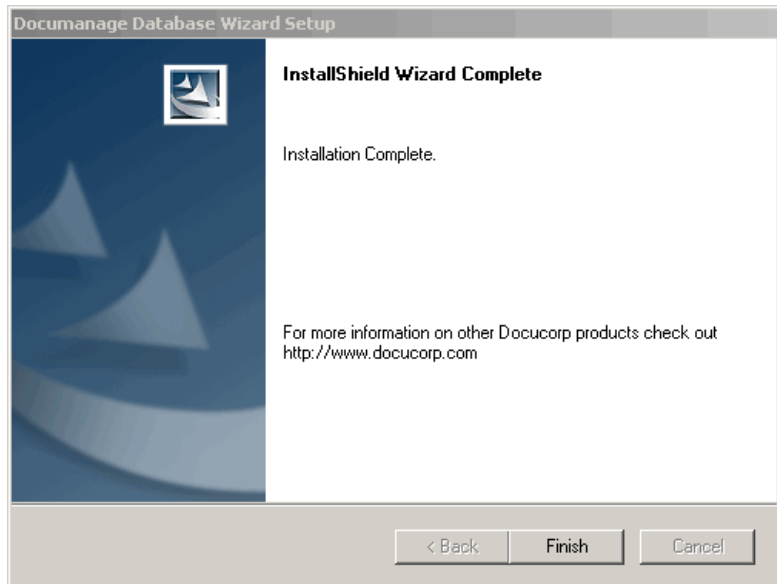


The *Run Database Wizard* dialog appears.

**NOTE:** If you choose *No*, you can run the Database Setup Wizard at any time from the Start | Programs | Documanage menu.

---

- 12 From the *Run Database Wizard* dialog, click **No**.  
The *InstallShield Wizard Complete* dialog appears.



- 13 Click **Finish** on the *Documanage Database Wizard Setup* dialog.

## Documanage Database Wizard

The Documanage Database (DB) Wizard sets up the Documanage housekeeping tables. You select the target database (DBMS) and the wizard

## Database

### Documanage Database Wizard

---

guides you through a series of options. Based upon the options you select, the wizard produces a table generation script that creates the Documanage database and housekeeping tables, along with a DSN connection. You can review the script before it is executed.

By default, the Database Wizard creates a DMANAGE database in the Documanage system. However, the Documanage Server can be configured to use any Database Name, User Name, Data Source Name, and Tablespace Name.

---

**NOTE:** You must run the Database Wizard Installer on the machine hosting the database containing the Line of Business tables. The Documanage Database Management System (DBMS) that manages any existing Line of Business database should be configured and running and its system Data Source Names should be configured before installing the DBMS client software. Drivers must be installed on the machine(s) hosting the Documanage Router, Server, Administration, Workstation, and utility (such as Document Migration) components.

---

If Documanage supports your Database Management System, but the Database Wizard does not, there are complicating factors requiring intervention by a Database Administrator. Please refer to the Database Administrator's Guide to Documanage for further information and installation and configuration help.

## Supported Databases

The Database Wizard currently supports the following databases:

- ◆ MySQL—Refer to “Setting up the Documanage housekeeping tables for MySQL” on page 43.

- ◆ Microsoft SQL Server—Refer to “Setting up the Documanager housekeeping tables for Microsoft SQL Server” on page 52.
- ◆ Oracle—“Setting up the Documanager housekeeping tables for Oracle” on page 64.
- ◆ Sybase ASE—“Setting up the Documanager housekeeping tables for Sybase ASE” on page 75.

## Setting up the Documanager housekeeping tables for MySQL

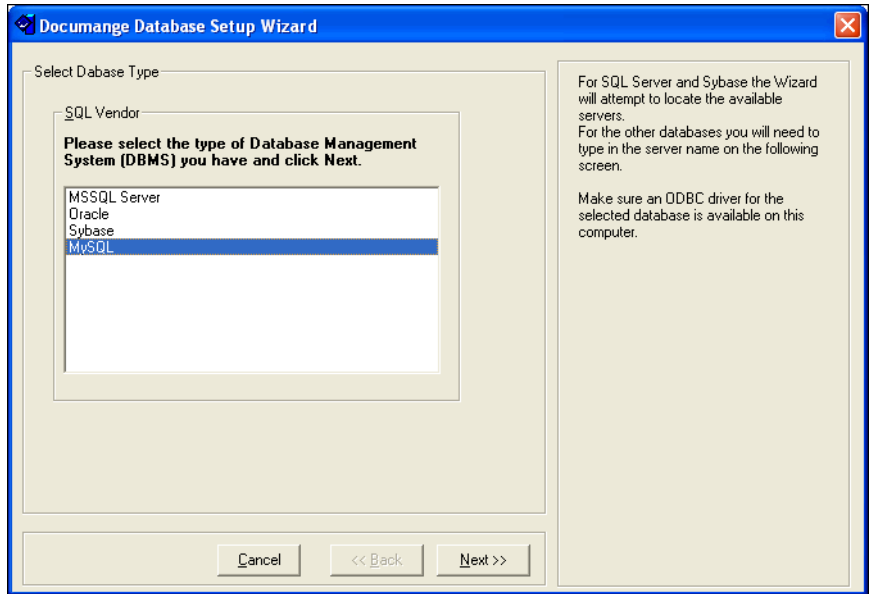
To setup the Documanager housekeeping tables on MySQL, proceed as follows:

- 1 **Click Start | Programs | Documanager | Database Setup Wizard to run the Database Setup Wizard.**  
The *Select Database Type* dialog appears.

## Database

### Documanage Database Wizard

---



- ◆ Select *MySQL* from the list of target databases.

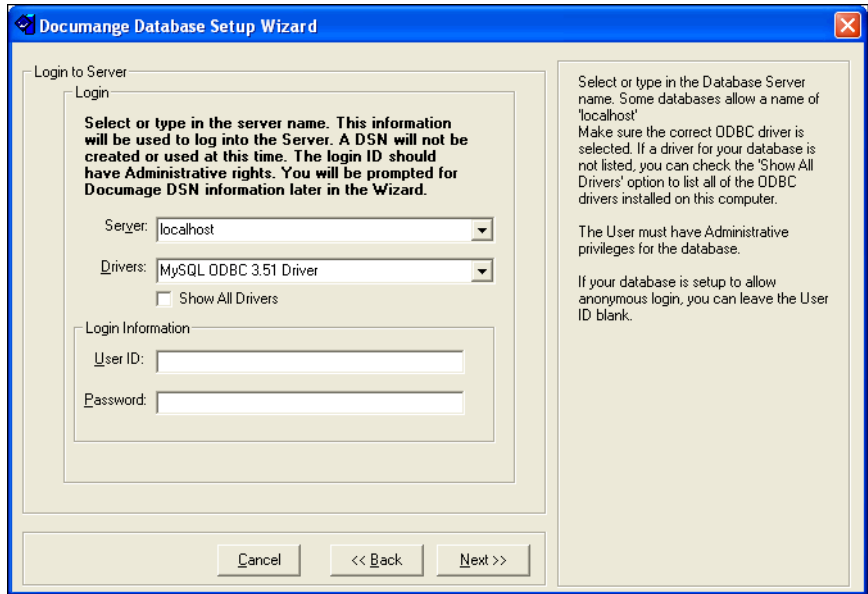
---

**NOTE:** A MySQL ODBC driver must be available on your computer.

---

**2 Click *Next >*.**

The *Login to Server* dialog appears.



- ◆ Type in the name of the MySQL server. Use `localhost` if the server is running on the same machine as the Wizard.

---

**NOTE:** The MySQL Server ODBC Driver should be preselected. You can also select a different ODBC driver if necessary.

---

- ◆ Select *Show All Drivers* to show all of the ODBC drivers installed on your computer. Make sure that you have selected the correct ODBC driver.
- ◆ Enter a *UserID* and a *Password*.

---

**NOTE:** The *UserID* should have administrative privileges for the database.

---

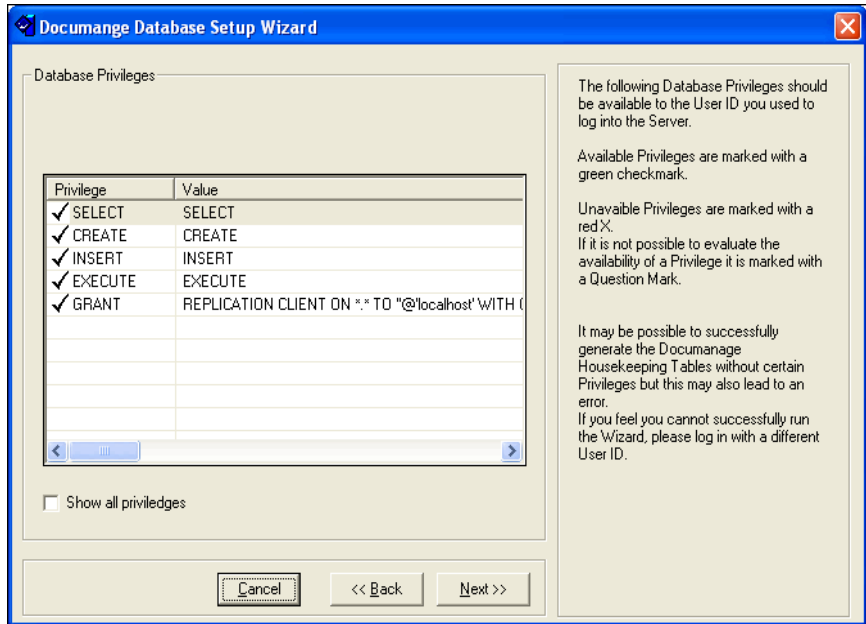
## Database

### Documange Database Wizard

---

#### 3 Click **Next >>**.

The Wizard will log into the server and attempt to evaluate the authorities available to the UserID.



---

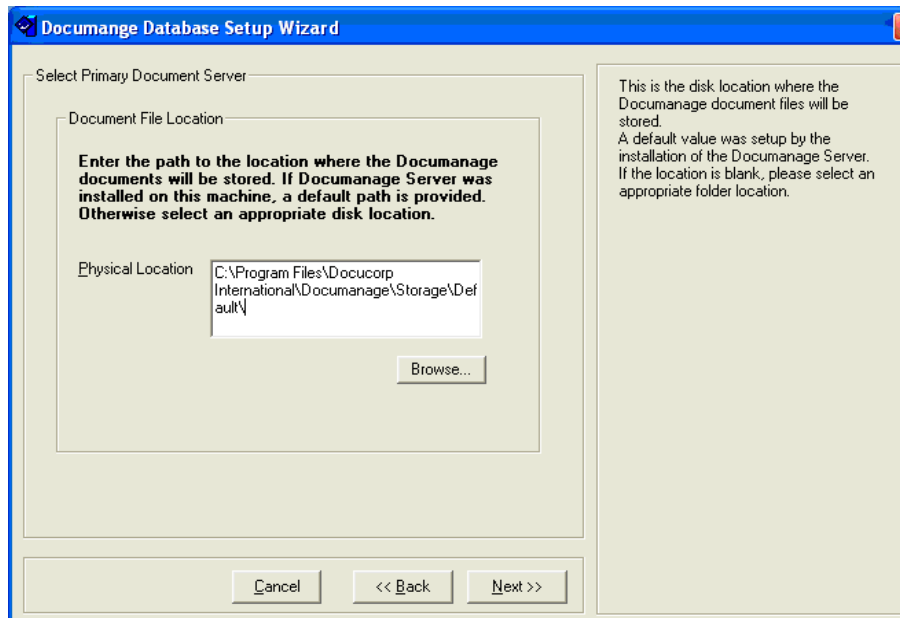
**NOTE:** The Wizard needs database privileges to create the Documange housekeeping tables. Privileges that are not available are marked with a red X, while available privileges are marked with a green check mark. If the status of a privilege cannot be determined it is marked with a question mark.

---

- ◆ If the required privileges are not available, log in with a *UserID* that has the required privileges.

**4 Click *Next >>*.**

The *Select Primary Document Server* dialog appears.



- ◆ Specify the location where the Documange document files should be stored..
- ◆ Click *Browse...* to navigate to the storage location.

**5 Click *Next >>*.**

The *DSN Connection Information* dialog appears.

## Database

### Documanage Database Wizard

---

The screenshot shows the 'Documanage Database Setup Wizard' window. It has a blue title bar with the text 'Documanage Database Setup Wizard' and a close button. The main area is divided into two sections: 'DSN Connection Information' and 'User Login Information'. In the 'DSN Connection Information' section, there is a 'Data Source Name' dropdown menu with 'DMANAGE' selected, a 'Use existing DSN' checkbox which is unchecked, a 'Driver' text box with 'MySQL ODBC 3.51 Driver', and a 'Server' text box with 'localhost'. Below these fields is a bolded note: 'A DSN will be created with the connection information specified here. You may also select an existing DSN.' The 'User Login Information' section has a 'User ID' text box with 'DMANAGE', a 'Password' text box with masked characters, and a 'Re-enter Password' text box with masked characters. At the bottom of the wizard are three buttons: 'Cancel', '<< Back', and 'Next >>'. On the right side of the wizard, there is a text area with the following text: 'This is the DSN that will be used by Documanage. A DSN will be created with the information provided here. If a DSN with that name already exists, it will be removed and recreated. You can also use an existing DSN by checking that option and selecting a DSN from the list. In that case the DSN will not be recreated. The User ID will become that Database Owner for the Documanage Housekeeping Tables Database. If the User ID does not exist in the Database, it will be created as part of the setup process.'

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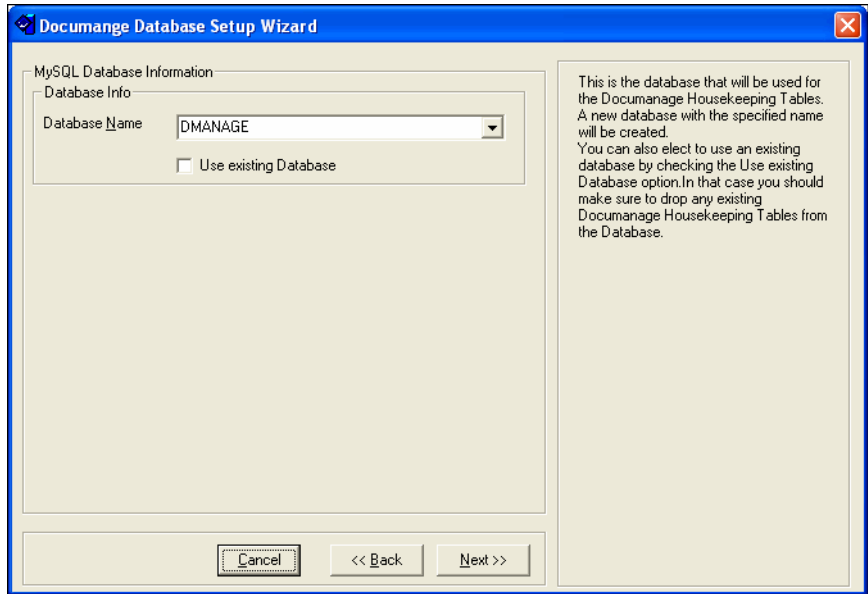
**NOTE:** You can use an existing *Data Source Name* and *UserID* or the Wizard can create them.

---

- ◆ Either select a *Data Source Name* from the list or type in a *Data Source Name*.
- ◆ Specify the *UserID* that owns of the Documanage housekeeping tables.

**6 Click *Next >>*.**

The *MySQL Database Information* dialog appears.



- ◆ Specify the *Database Name* for the Documange housekeeping tables.

---

**NOTE:** You can use an existing *Database Name* but you should make sure that the Documange tables do not already exist in the database.

---

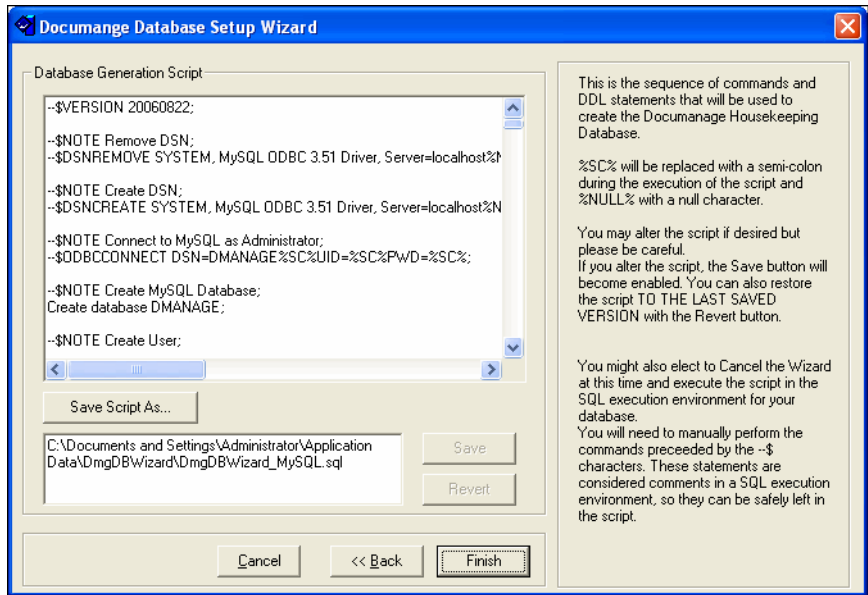
**7 Click *Next >>*.**

The *Database Generation Script* dialog appears.

## Database

### Documanage Database Wizard

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---

**NOTE:** Based on the options that you have specified, the Wizard creates a table generation script. You can review and alter the script before the database management system executes it, although you should be very careful when you do so. You can also save the script and execute it in the appropriate SQL execution environment for your target database. If you do, you may have to perform certain actions manually (the creation of the DSN connection, for instance). The actions performed by the Wizard will be evaluated as comments and will not be executed.

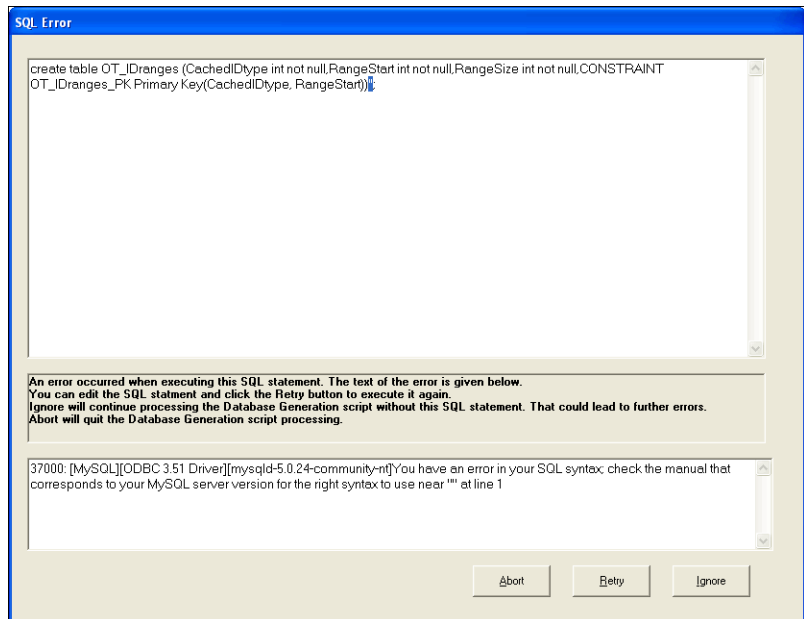
---

#### 8 Click **Finish** to generate the Documanage housekeeping tables.

The *SQL Error* dialog appears if an error is encountered while executing a SQL statement.

**NOTE:** This dialog should never appear with scripts provided by Skywire Software. However, if you have altered the table generation script this dialog may allow you to correct any errors introduced there.

---



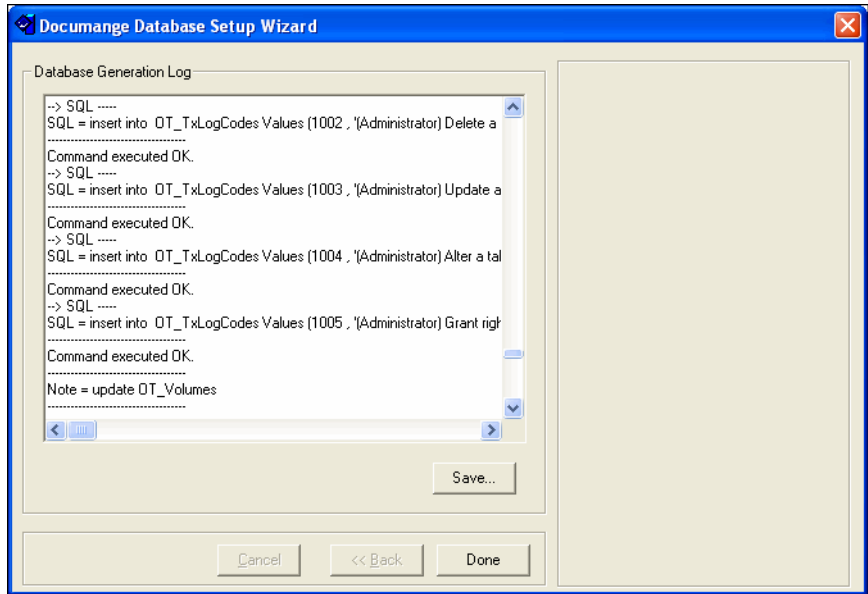
- ◆ Clicking *Abort* stops the execution of the script.
- ◆ You can correct an SQL statement and click *Retry*.
- ◆ If you click *Ignore*, the SQL statement will not be executed and the script will continue running.

The *Database Generation Log*, which displays a record of the actions performed by the Wizard, appears after the script has finished executing.

## Database

### Documanage Database Wizard

---

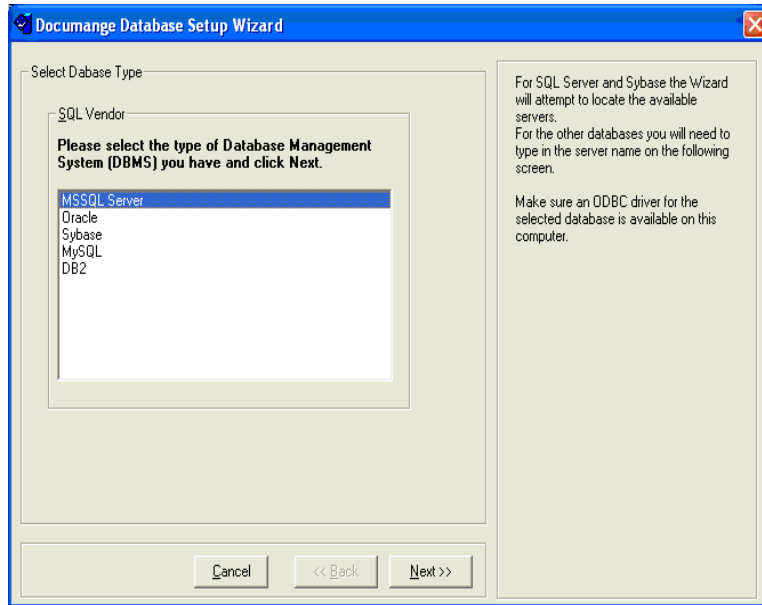


- 9 Click **Save...** to save the log to disk.
- 10 Click **Done** to quit the Database Wizard.

## Setting up the Documanage housekeeping tables for Microsoft SQL Server

To setup the Documanage housekeeping tables on Microsoft SQL Server, proceed as follows:

- 1 Click **Start | Programs | Documanage | Database Setup Wizard** to run the Database Setup Wizard.  
The *Select Database Type* dialog appears.



- ◆ Select *MSSQL Server* from the list of target databases.

---

**NOTE:** A SQL Server ODBC driver must be available on your computer.

---

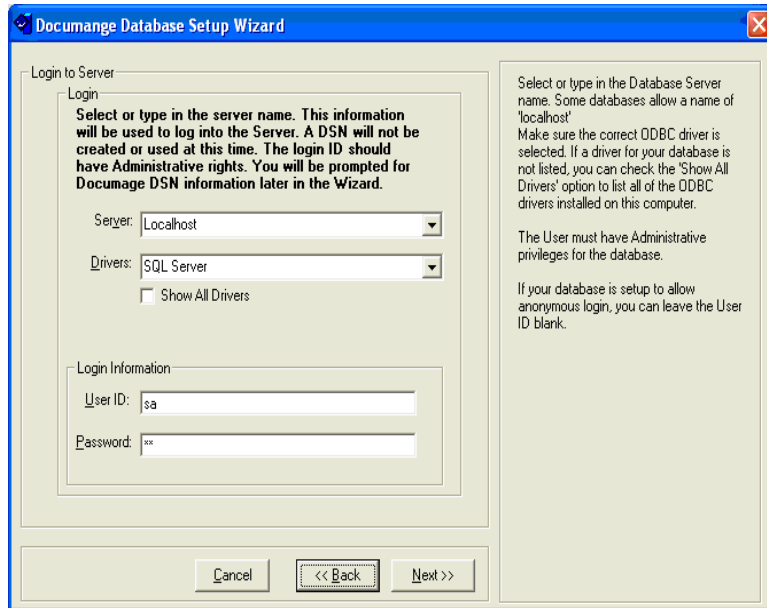
**2 Click *Next >>*.**

The *Login to Server* dialog appears.

## Database

### Documanage Database Wizard

---



- ◆ The Server list shows the SQL Servers available on your network. If the appropriate server is not listed, you can type it in.
- ◆ The SQL Server ODBC driver should be preselected. You can also select a different ODBC driver if necessary.
- ◆ Select *Show All Drivers* to show all of the ODBC drivers installed on your computer. Make sure that you have selected the correct ODBC driver.
- ◆ Enter a *UserID* and *Password*.

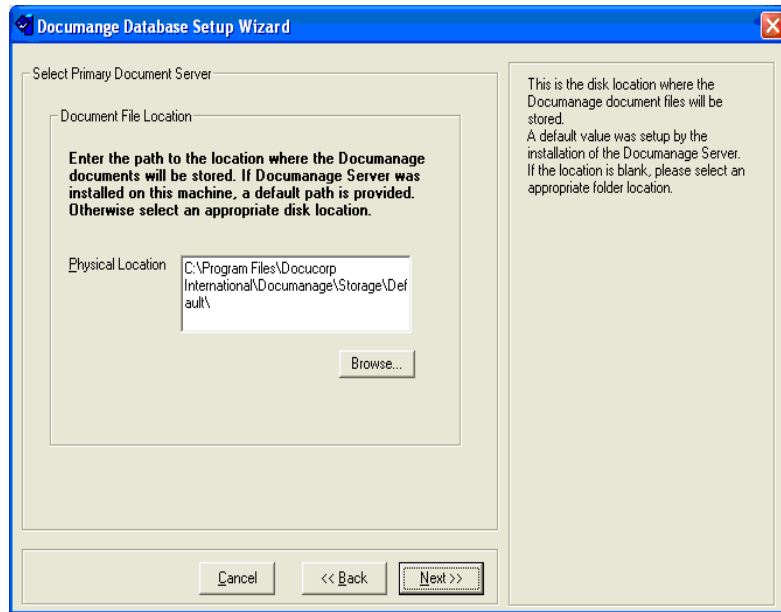
---

**NOTE:** The *UserID* should have administrative privileges for the database.

---

### 3 Click **Next >>**.

The *Select Primary Document Server* dialog appears.



- ◆ Specify the *Physical Location* where the Documange document files should be stored.

---

**NOTE:** If the Documange Server is installed on this machine, the default location is already filled in.

---

- ◆ Click *Browse...* to navigate to the appropriate file location.

## Database

### Documanage Database Wizard

---

#### 4 Click *Next >>*.

The *Estimate Disk Space Requirements* dialog appears.

The screenshot shows the 'Documanage Database Setup Wizard' window, specifically the 'Estimate Disk Space Requirements' step. The window has a title bar with the text 'Documanage Database Setup Wizard' and a small icon on the left. The main content area is divided into two sections. The left section contains a text box with the message: 'The following numbers need not be precise. However, the more correct your answers are, the better the database system will run.' Below this text box are three input fields: 'Initial number of documents to be imported' with a value of '10000', 'Documents to be added in the next year' with a value of '25000', and 'Total Disk Space Requirements' with a value of '85' and a unit of 'Mb'. The right section contains a text box with the message: 'This information will be used to setup the device sizes for the database.' At the bottom of the window, there are three buttons: 'Cancel', '<< Back', and 'Next >>'.

- ◆ Enter the *Initial number of documents to be imported* into Documanage and an estimate of the number of *Documents to be added in the next year*.

---

**NOTE:** The Wizard estimates the *Total Disk Space Requirements* for the SQL Server database storage device. The device settings can be changed by a Database Administrator (DBA) if these figures prove to be incorrect.

---

**5 Click Next >>.**

The *DSN Connection Information* dialog appears.

The screenshot shows the 'Documanage Database Setup Wizard' dialog box. It is divided into two main sections: 'DSN Connection Information' and 'User Login Information'.  
In the 'DSN Connection Information' section, there is a 'Data Source Name' dropdown menu with 'DMANAGE' selected. Below it is a checkbox labeled 'Use existing DSN' which is unchecked. Further down are text boxes for 'Driver:' containing 'SQL Server' and 'Server:' containing 'HSAPRE\_D600'. A bolded note states: 'A DSN will be created with the connection information specified here. You may also select an existing DSN.'  
The 'User Login Information' section contains three text boxes: 'UserID:' with 'DMG', 'Password:' with '\*\*\*', and 'Re-enter Password:' with '\*\*\*'.  
At the bottom of the dialog are three buttons: 'Cancel', '<< Back', and 'Next >>'.  
On the right side of the dialog, there is explanatory text: 'This is the DSN that will be used by Documanage. A DSN will be created with the information provided here. If a DSN with that name already exists, it will be removed and recreated.' followed by 'You can also use an existing DSN by checking that option and selecting a DSN from the list. In that case the DSN will not be recreated.' and finally 'The UserID will become that Database Owner for the Documanage Housekeeping Tables Database. If the UserID does not exist in the Database, it will be created as part of the setup process.'

---

**NOTE:** You can use an existing *Data Source Name* and *UserID* or the Wizard can create them.

---

- ◆ Either select a *Data Source Name* from the list or type in a *Data Source Name*.
- ◆ Specify the *UserID* that owns of the Documanage housekeeping tables.

## Database

### Documanage Database Wizard

#### 6 Click **Next >>**.

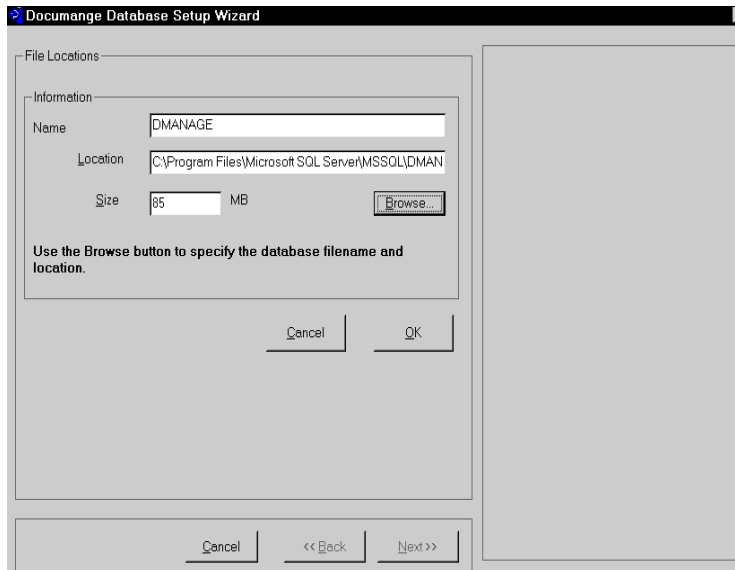
The *SQL Database Information* dialog appears.

The screenshot shows the 'Documanage Database Setup Wizard' dialog box. It is divided into two main sections: 'SQL Server Database Information' and a right-hand text area. The 'SQL Server Database Information' section is further divided into 'Database Info' and 'Target Location'. In the 'Database Info' section, the 'Database Name' is set to 'DMANAGE' in a dropdown menu, and the 'Use existing Database' checkbox is unchecked. In the 'Target Location' section, the 'Database File' is set to a dropdown menu, 'Size (MB)' is 85, 'Location' is 'C:\Program Files\Microsoft SQL Server\MSSQL\DMAN', 'Log File' is set to a dropdown menu, 'Size (MB)' is 10, and 'Location' is an empty text box. The right-hand text area contains instructions: 'This is the database that will be used for the Documanage Housekeeping Tables. A new database with the specified name will be created. You can also elect to use an existing database by checking the Use existing Database option. In that case you should make sure to drop any existing Documanage Housekeeping Tables from the Database. You also need to setup Database and Log Devices.' At the bottom of the dialog, there are three buttons: 'Cancel', '<< Back', and 'Next >>'. The 'Next >>' button is highlighted.

- ◆ Specify the *Database Name* for the Documanage housekeeping tables.

- 7 **You can also specify a Data Device and a Log Device for the database. You can either use existing devices or create new devices by selecting *<new>* in the list.**

If you select *<new>* the *Device Information* dialog appears, and you can specify a location for a Database and Log file.



- ◆ Specify the *File Name* and disk location.

---

**NOTE:** The *File Size* is determined by the values that you specified earlier.

---

## Database

### Documanage Database Wizard

- 8 Click **OK** to return the previous screen, or **Cancel** to not set up a device for creation. .

The *SQL Server Database Information* dialog appears.

The screenshot shows the 'Documanage Database Setup Wizard' dialog box. It is divided into two main sections: 'SQL Server Database Information' and a right-hand panel with instructions.

**SQL Server Database Information**

- Database Info**
  - Database Name: DMANAGE (dropdown menu)
  - ☐ Use existing Database
- Target Location**
  - Database File: NEW: DMANAGE (dropdown menu)
  - Size (MB): 85 (text box)
  - Location: C:\Program Files\Microsoft SQL Server\MSSQL\DMAN (text box)
  - Log File: NEW: DMANAGE\_Log (dropdown menu)
  - Size (MB): 10 (text box)
  - Location: C:\Program Files\Microsoft SQL Server\MSSQL\DMAN (text box)

**Right-hand panel text:**

This is the database that will be used for the Documanage Housekeeping Tables. A new database with the specified name will be created.

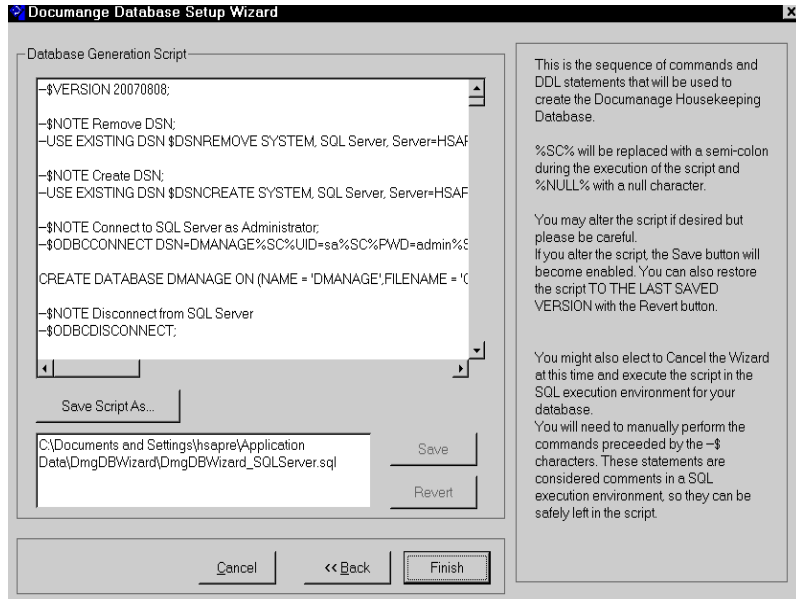
You can also elect to use an existing database by checking the Use existing Database option. In that case you should make sure to drop any existing Documanage Housekeeping Tables from the Database.

You also need to setup Database and Log Devices.

**Buttons:** Cancel, << Back, Next >>

9 Click **Next >>**.

Based on the various options that were specified, the Wizard creates a table generation script. The *Database Generation Script* dialog appears.



**NOTE:** Based on the options that you have specified, the Wizard creates a table generation script. You can review and alter the script before the database management system executes it, although you should be very careful when you do so. You can also save the script and execute it in the appropriate SQL execution environment for your target database. If you do, you may have to perform certain actions manually (the creation of the DSN connection, for instance). The actions performed by the Wizard will be evaluated as comments and will not be executed.

## Database

### Documanage Database Wizard

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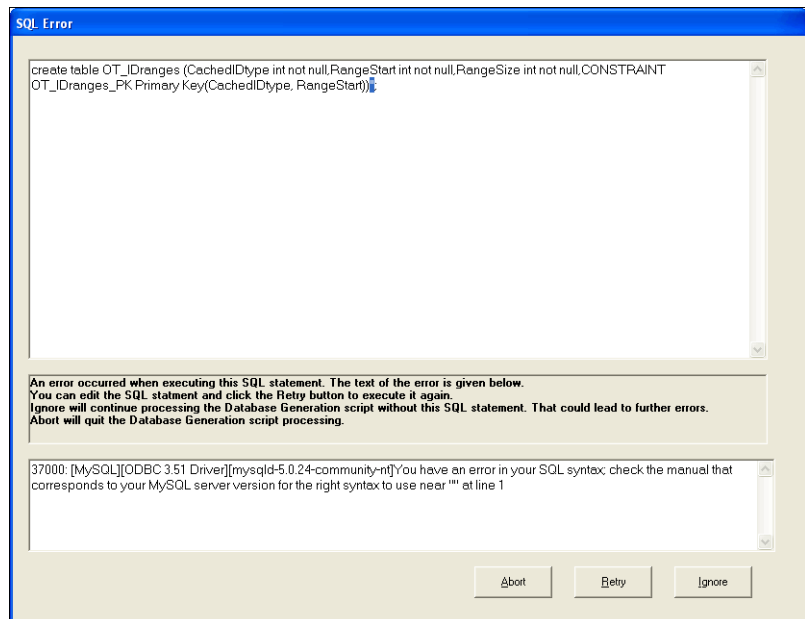
#### 10 Click **Finish** to generate the Documanage housekeeping tables.

The *SQL Error* dialog appears if an error is encountered while executing a SQL statement.

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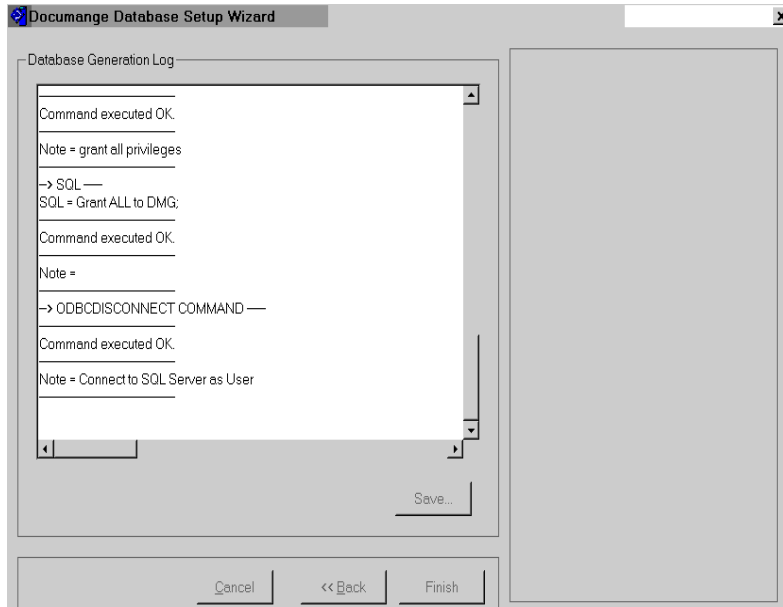
**NOTE:** This dialog should never appear with scripts provided by Skywire Software. However, if you have altered the table generation script, this dialog may allow you to correct any errors introduced there.

---



- ◆ Clicking *Abort* stops the execution of the script.
- ◆ You can correct an SQL statement and click *Retry*.
- ◆ If you click *Ignore*, the SQL statement will not be executed and the script will continue running.

The *Database Generation Log*, which displays a record of the actions performed by the Wizard, appears after the script has finished executing.



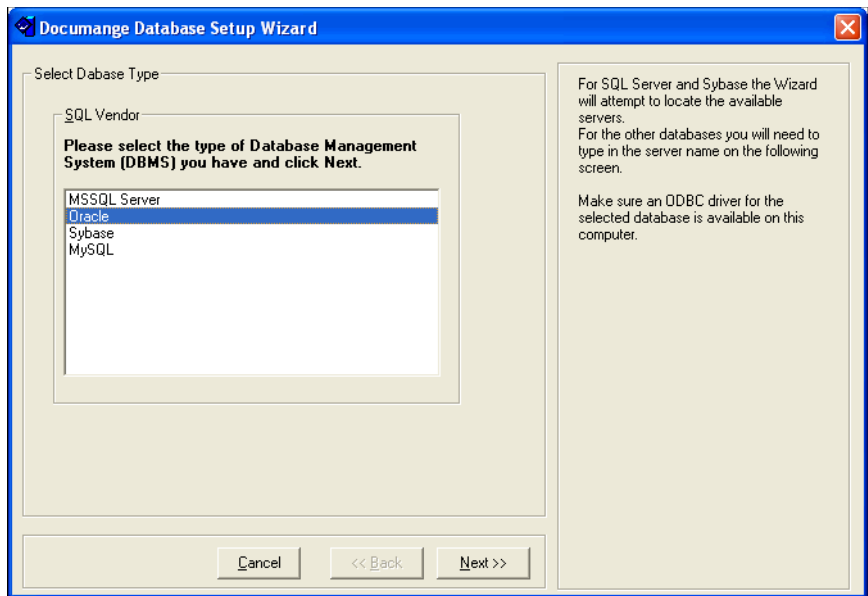
- 11 Click **Save...** to save the log to disk.
- 12 Click **Done** to quit the Database Wizard.

## Setting up the Documanage housekeeping tables for Oracle

To setup the Documanage housekeeping tables on Oracle, proceed as follows:

- 1 **Click Start | Programs | Documanage | Database Setup Wizard to run the Database Setup Wizard.**

The *Select Database Type* dialog appears.



- ◆ Select *Oracle* from the list of target databases.

---

**NOTE:** An Oracle ODBC driver must be available on your computer.

---

**2 Click Next >>.**

The *Login to Server* dialog appears.

The screenshot shows the 'Documanage Database Setup Wizard' window. The title bar is blue with a document icon and a close button. The main area is divided into two panes. The left pane, titled 'Login to Server', contains a 'Login' section with instructions: 'Select or type in the server name. This information will be used to log into the Server. A DSN will not be created or used at this time. The login ID should have Administrative rights. You will be prompted for Documage DSN information later in the Wizard.' Below this are fields for 'Server:' (containing 'orcl') and 'Drivers:' (containing 'Oracle in OraDb10g\_home1'), with a 'Show All Drivers' checkbox. A 'Login Information' section contains 'User ID:' (containing 'SYSTEM') and 'Password:' (containing 'xxxxxxx'). The right pane contains instructions: 'Select or type in the Database Server name. Some databases allow a name of 'localhost'. Make sure the correct ODBC driver is selected. If a driver for your database is not listed, you can check the 'Show All Drivers' option to list all of the ODBC drivers installed on this computer.' Below this is a note: 'The User must have Administrative privileges for the database.' and another note: 'If your database is setup to allow anonymous login, you can leave the User ID blank.' At the bottom are 'Cancel', '<< Back', and 'Next >>' buttons.

- ◆ Type in the name of the Server.
- ◆ The Oracle ODBC Driver should be preselected. You can also select a different ODBC driver if necessary.
- ◆ Select *Show All Drivers* to show all of the ODBC drivers installed on your computer. Make sure that you have selected the correct ODBC driver.
- ◆ Enter a *UserID* and a *Password*.

---

**NOTE:** The *UserID* should have administrative privileges for the database.

---

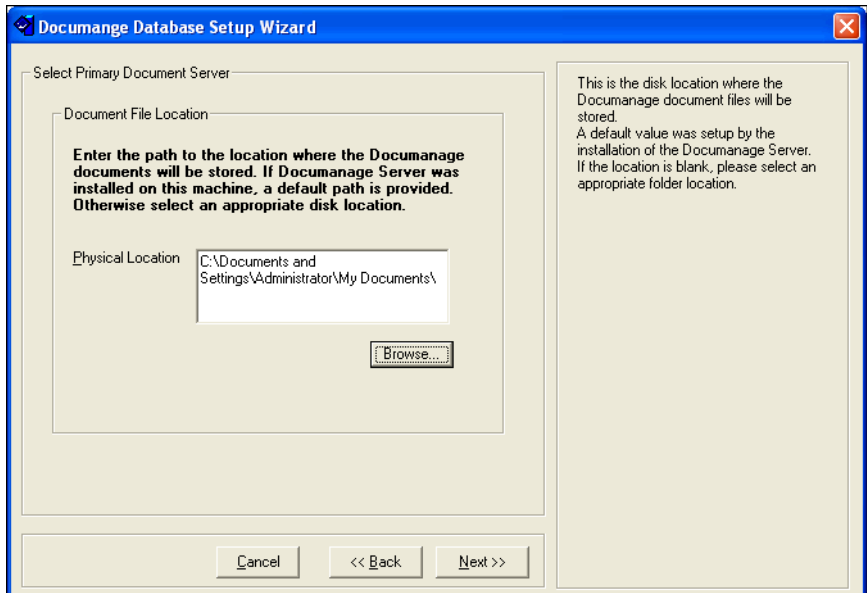
## Database

### Documanage Database Wizard

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#### 3 Click **Next >>**.

The *Select Primary Document Server* dialog appears.



- ◆ Specify where the Documanage document files should be stored.

If the Documanage Server is installed on this machine, the default location is already filled in.

Click *Browse...* to navigate to the storage location.

**4 Click *Next >>*.**

The *Estimate Disk Requirements* dialog appears.

The screenshot shows a window titled "Documanage Database Setup Wizard" with a close button in the top right corner. The main area is titled "Estimate Disk Space Requirements" and contains the following text: "The following numbers need not be precise. However, the more correct your answers are, the better the database system will run." Below this text are three input fields: "Initial number of documents to be imported" with a value of 10000, "Documents to be added in the next year" with a value of 5000, and "Total Disk Space Requirements" with a value of 65 Mb. To the right of the input fields, there is a text box that says "This information will be used to setup the device sizes for the database." At the bottom of the window are three buttons: "Cancel", "<< Back", and "Next >>".

- ◆ Enter the *Initial number of documents to be imported into Documanage* and an estimate of the number of *Documents to be added it the next year*.

---

**NOTE:** The Wizard estimates the *Total Disk Space Requirements* for the Oracle database storage device. The device settings can be changed by a Database Administrator (DBA) if these figures prove to be incorrect.

---

## Database

### Documanage Database Wizard

---

#### 5 Click **Next >>**.

The *DSN Connection Information* dialog appears.

The screenshot shows the 'Documanage Database Setup Wizard' dialog box. It has a blue title bar with the text 'Documanage Database Setup Wizard' and a close button. The main area is divided into two sections: 'DSN Connection Information' and 'User Login Information'. In the 'DSN Connection Information' section, there is a 'Data Source Name' dropdown menu with 'DMANAGE' selected, a 'Use existing DSN' checkbox (unchecked), a 'Driver' text box with 'Oracle in OraDb10g\_home1', and a 'Server' text box with 'orcl'. Below these fields is a bolded instruction: 'A DSN will be created with the connection information specified here. You may also select an existing DSN.' The 'User Login Information' section contains three text boxes: 'User ID' with 'DmgOwner', 'Password' with 'xxxxxxxx', and 'Re-enter Password' with 'xxxxxxxx'. At the bottom of the dialog are three buttons: 'Cancel', '<< Back', and 'Next >>'. On the right side of the dialog, there is a text area with the following text: 'This is the DSN that will be used by Documanage. A DSN will be created with the information provided here. If a DSN with that name already exists, it will be removed and recreated. You can also use an existing DSN by checking that option and selecting a DSN from the list. In that case the DSN will not be recreated. The User ID will become that Database Owner for the Documanage Housekeeping Tables Database. If the User ID does not exist in the Database, it will be created as part of the setup process.'

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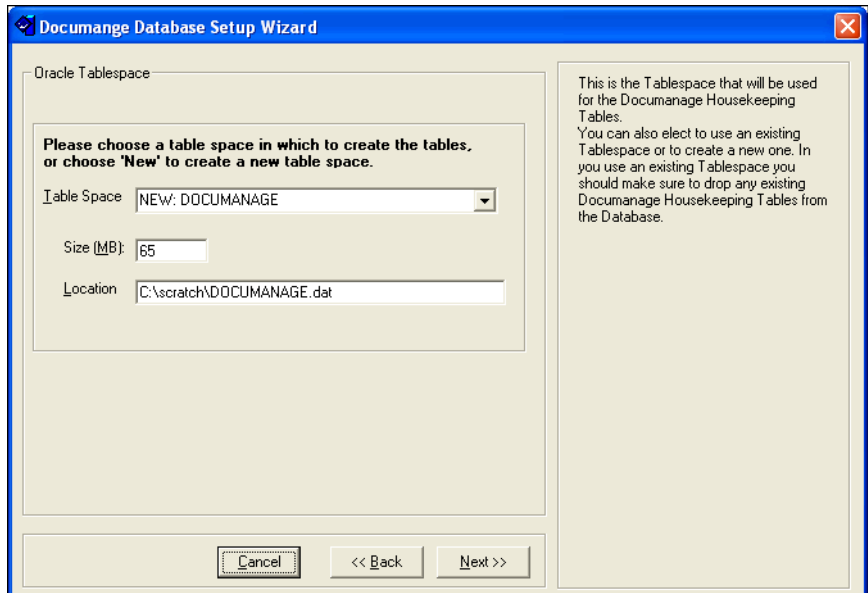
**NOTE:** You can use an existing *Data Source Name* and *UserID* or the Wizard can create them.

---

- ◆ Either select a *Data Source Name* from the list or type in a *Data Source Name*.
- ◆ Specify the *UserID* that owns the Documanage housekeeping tables.

**6 Click *Next >>*.**

The *Oracle Tablespace* dialog appears.



- ◆ Specify the name of the Tablespace that will be created to house the Documange housekeeping tables.
- ◆ You can also use an existing Tablespace but you should make sure that the Documange tables do not already exist in the database.

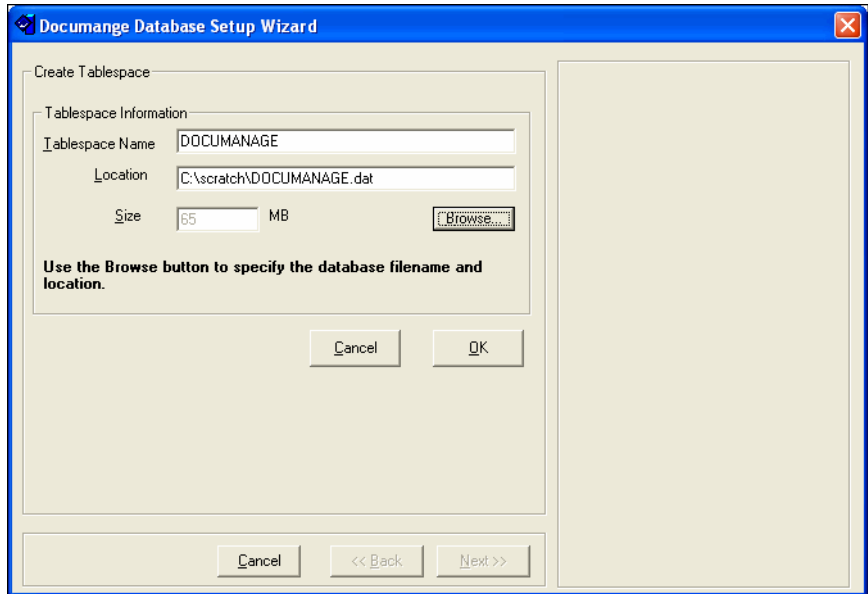
## Database

### Documanage Database Wizard

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- 7 If you want to create a new Tablespace select <new> from the list. The Create Tablespace screen will appear.

The Create Tablespace dialog appears.



The screenshot shows the 'Documanage Database Setup Wizard' window, specifically the 'Create Tablespace' step. The window has a blue title bar with the text 'Documanage Database Setup Wizard' and a close button. The main area is titled 'Create Tablespace' and contains a 'Tablespace Information' section. This section has three input fields: 'Tablespace Name' with the value 'DOCUMANAGE', 'Location' with the value 'C:\scratch\DOCUMANAGE.dat', and 'Size' with the value '65' and 'MB' unit. A 'Browse...' button is next to the 'Size' field. Below these fields is a note: 'Use the Browse button to specify the database filename and location.' At the bottom of the 'Tablespace Information' section are 'Cancel' and 'OK' buttons. At the bottom of the entire window are 'Cancel', '<< Back', and 'Next >>' buttons.

---

**NOTE:** You must specify the Tablespace Name and disk location. The size will be predetermined by the values you specified earlier.

---

- 8 Click **OK** to return the previous screen, or click **Cancel** to not setup a Tablespace for creation. If the Tablespace you are attempting to create already exists, an error dialog will be posted.

The *Oracle Tablespace* dialog appears.

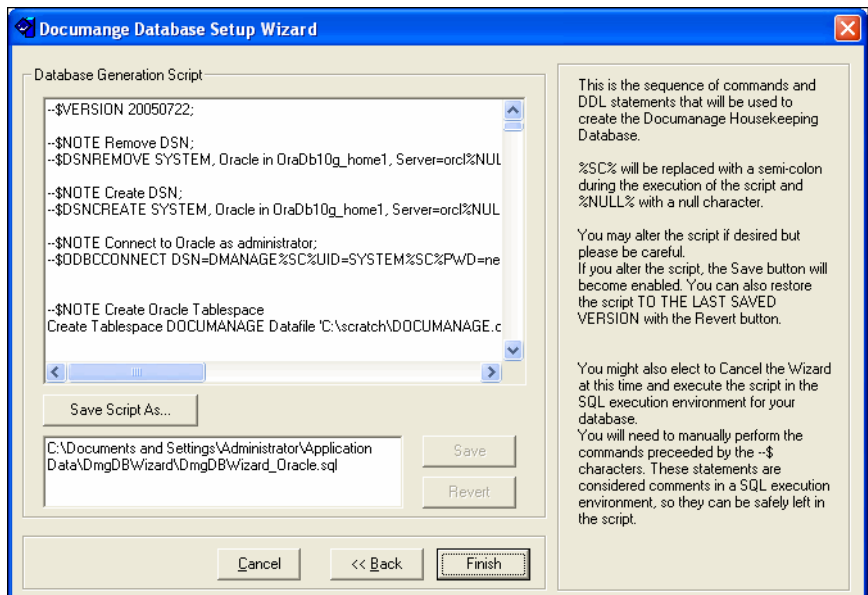
The screenshot shows a Windows-style dialog box titled "Documange Database Setup Wizard". It has a blue title bar with a standard Windows icon on the left and a close button (X) on the right. The main area is divided into two panes. The left pane is titled "Oracle Tablespace" and contains the following text: "Please choose a table space in which to create the tables, or choose 'New' to create a new table space." Below this text are three input fields: "Table Space" with a dropdown menu showing "NEW: DOCUMANAGE", "Size (MB)" with a text box containing "65", and "Location" with a text box containing "C:\scratch\DOCUMANAGE.dat". The right pane contains explanatory text: "This is the Tablespace that will be used for the Documange Housekeeping Tables. You can also elect to use an existing Tablespace or to create a new one. In you use an existing Tablespace you should make sure to drop any existing Documange Housekeeping Tables from the Database." At the bottom of the dialog, there are three buttons: "Cancel" (with a dashed border), "<< Back", and "Next >>".

## Database

### Documanage Database Wizard

#### 9 When the Tablespace is specified, Click **Next >>**.

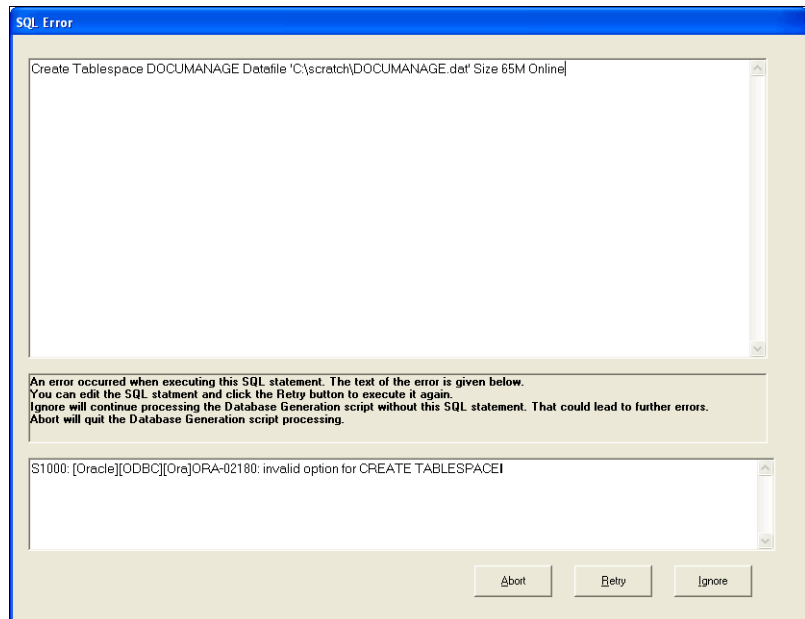
The Database Generation Script dialog appears.



Based on the various options that were specified the Wizard will create a table generation script. You can review the script prior to execution, and you can alter it if necessary although you should be very careful about this. You can also save the script and execute it in the appropriate SQL execution environment for your target database. In that case it may be necessary for you to perform certain actions manually (such as the creation of the DSN connection). The various actions performed by the Wizard will evaluation as comments in a SQL execution environment and will not be executed.

**10 Click *Finish* to generate the Documanage housekeeping tables.**

If an error is encountered while executing a SQL statement, the SQL Error dialog appears.



- ◆ Click *Abort* to stop the execution of the script.
- ◆ After correcting an SQL statement click *Retry*.
- ◆ Click *Ignore* to keep an SQL statement from being executed, allowing the script to continue running.

## Database

### Documanage Database Wizard

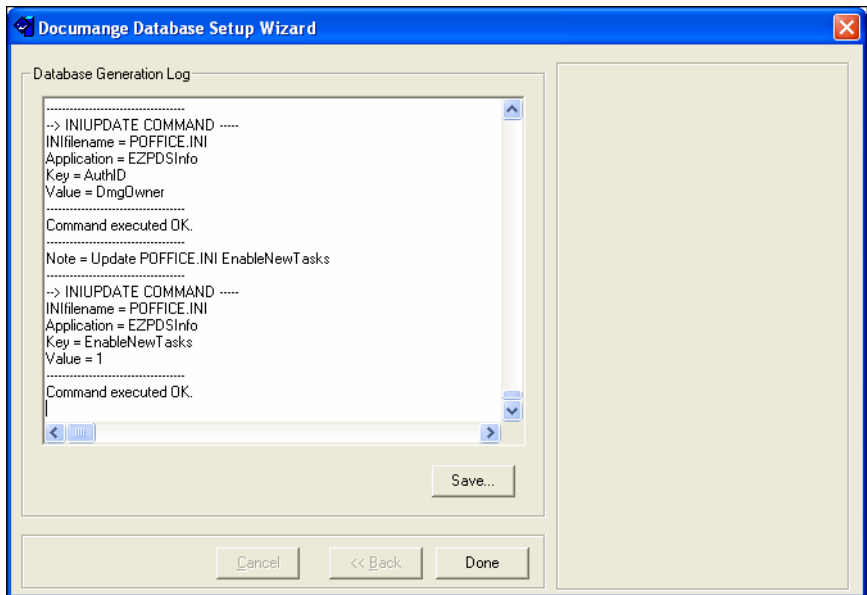
---

**NOTE:** This dialog should never appear with scripts provided by Skywire Software. However, if you have altered the table generation script this dialog may allow you to correct any errors introduced there.

---

**11 When the script has finished executing you can view the activity log.**

The Database Generation Log dialog appears. This is a record of the various actions performed by the Wizard.



**12 Click *Save...* to save the log to disk.**

The Wizard has now created the Documanage housekeeping tables.

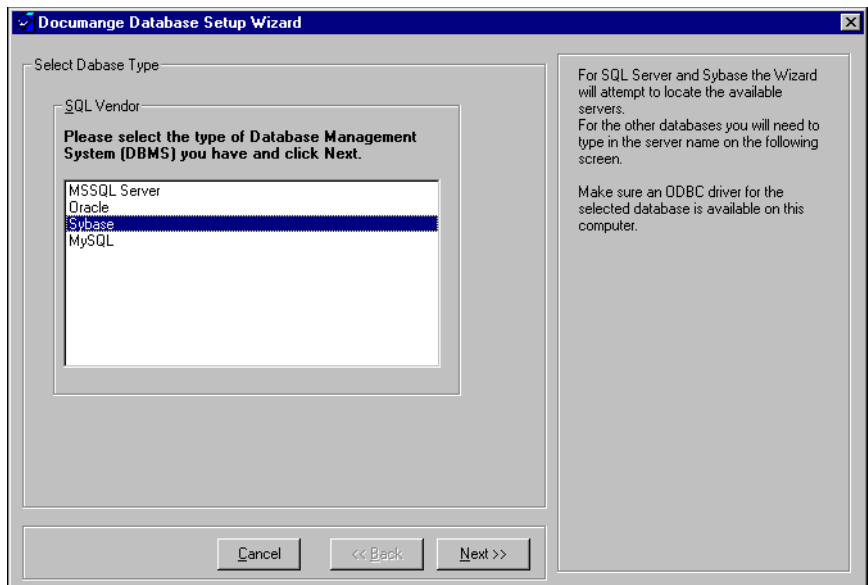
**13 Click *Done* to quit the Database Wizard.**

## Setting up the Documanage housekeeping tables for Sybase ASE

To setup the Documanage housekeeping tables on Sybase, proceed as follows:

**1 Click *Start | Programs | Documanage | Database Setup Wizard* to run the Database Setup Wizard.**

The *Select Database Type* dialog appears.



## Database

### Documanage Database Wizard

---

- ◆ Select *Sybase* from the list of target databases.

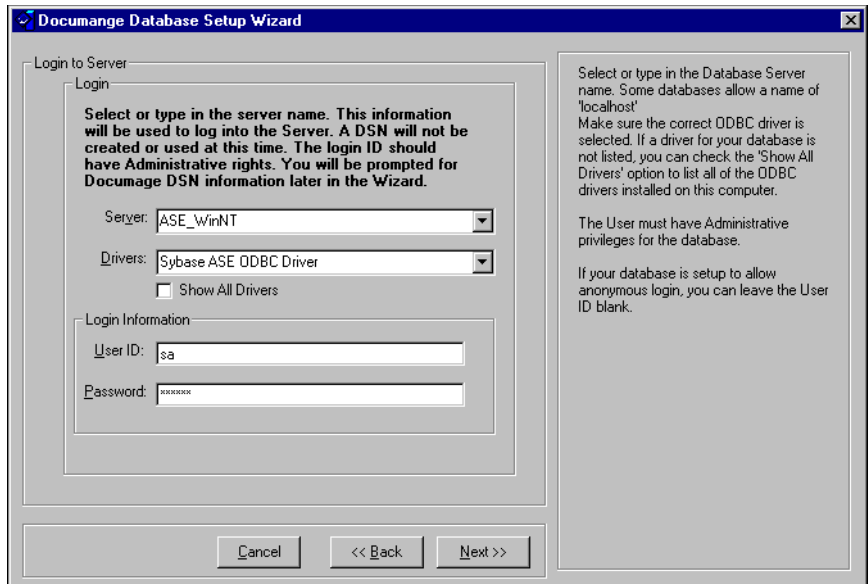
---

**NOTE:** A Sybase ODBC driver must be available on your computer.

---

#### 2 Click **Next >>**.

The *Login to Server* dialog appears.



- ◆ The *Server* list shows the Sybase Servers available on your network. If the appropriate server is not listed you can type it in.

---

**NOTE:** The Sybase ODBC driver should be preselected. You can also select a different ODBC driver if necessary.

---

- ◆ Select *Show All Drivers* to show all of the ODBC drivers installed on your computer. Make sure that you have selected the correct ODBC driver.
- ◆ Enter a *UserID* and a *Password*.

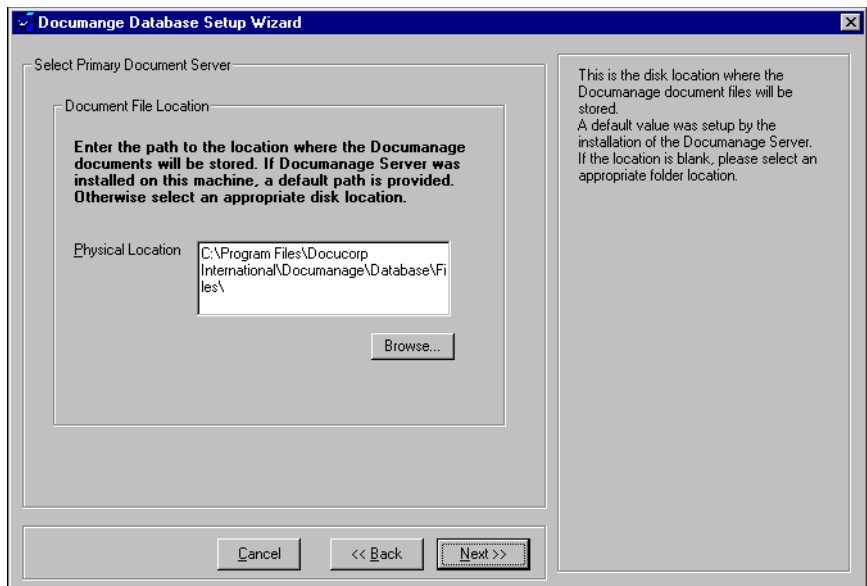
---

**NOTE:** The UserID should have administrative privileges for the database.

---

**3 Click *Next >>*.**

The *Select Primary Document Server* dialog appears.



- ◆ Specify the location where the Documange document files should be stored.

## Database

### Documanage Database Wizard

---

**NOTE:** If the Documanage Server is installed on this machine, the default location is already filled in.

---

- ◆ Click *Browse...* to navigate to the appropriate file location.

**4 Click *Next >>*.**

The *Estimate Disk Space Requirements* dialog appears.

The screenshot shows a Windows-style dialog box titled "Documanage Database Setup Wizard". The main area is titled "Estimate Disk Space Requirements". It contains a text box with the message: "The following numbers need not be precise. However, the more correct your answers are, the better the database system will run." Below this are three input fields: "Initial number of documents to be imported" with a value of 10000, "Documents to be added in the next year" with a value of 5000, and "Total Disk Space Requirements" with a value of 65 Mb. At the bottom are three buttons: "Cancel", "<< Back", and "Next >>". On the right side of the dialog, there is a text box that says: "This information will be used to setup the device sizes for the database."

- ◆ Enter the *Initial number of documents to be imported into Documanage* and an estimate of the number of *Documents to be added in the next year*.

---

**NOTE:** The Wizard estimates the *Total Disk Space Requirements* for the Sybase ASE database storage device. The device settings can be

changed by a Database Administrator (DBA) if these figures prove to be incorrect.

---

**5 Click *Next >>*.**

The *DSN Connection Information* dialog appears.

The screenshot shows the 'Documange Database Setup Wizard' dialog box. It has a title bar with a blue gradient and a close button. The main area is divided into two sections: 'DSN Connection Information' and 'User Login Information'. The 'DSN Connection Information' section contains a 'Data Source Name' dropdown menu with 'DMANAGE' selected, a 'Use existing DSN' checkbox (unchecked), a 'Driver' text box with 'Sybase ASE ODBC Driver', and a 'Server' text box with 'ASE\_WinNT'. Below these is a bolded note: 'A DSN will be created with the connection information specified here. You may also select an existing DSN.' The 'User Login Information' section contains three text boxes: 'User ID' with 'DmgOwner', 'Password' with masked characters, and 'Re-enter Password' with masked characters. At the bottom are three buttons: 'Cancel', '<< Back', and 'Next >>'. On the right side of the dialog, there is a large text area with instructions: 'This is the DSN that will be used by Documange. A DSN will be created with the information provided here. If a DSN with that name already exists, it will be removed and recreated. You can also use an existing DSN by checking that option and selecting a DSN from the list. In that case the DSN will not be recreated. The User ID will become that Database Owner for the Documange Housekeeping Tables Database. If the User ID does not exist in the Database, it will be created as part of the setup process.'

---

**NOTE:** You can use an existing Data Source Name and UserID or the Wizard can create them.

---

- ◆ Either select or specify a *Data Source Name*.
- ◆ Specify a *UserID* that will be the database owner for the Documange housekeeping tables.

## Database

### Documanage Database Wizard

---

#### 6 Click **Next >>**.

The *Sybase Data Information* dialog appears.

The screenshot shows the 'Documanage Database Setup Wizard' dialog box. It has a title bar with a blue gradient and a close button. The main area is divided into two sections: 'Sybase Database Information' and 'Target Location'. The 'Sybase Database Information' section contains a 'Database Info' group box with a 'Database Name' dropdown set to 'DMANAGE' and an unchecked 'Use existing Database' checkbox. The 'Target Location' section contains two groups: 'Data Device' and 'Log Device'. The 'Data Device' group has a dropdown set to 'NEW: DOCUMANAGETest', a 'Size (MB)' field set to '65', and a 'Location' field set to 'C:\sybase\DOCUMANAGETest.mdf'. The 'Log Device' group has a dropdown set to 'NEW: DOCUMANAGETestLog', a 'Size (MB)' field set to '10', and a 'Location' field set to 'C:\sybase\DOCUMANAGETestLog.ldf'. On the right side of the dialog, there is a text area with instructions: 'This is the database that will be used for the Documanage Housekeeping Tables. A new database with the specified name will be created. You can also elect to use an existing database by checking the Use existing Database option. In that case you should make sure to drop any existing Documanage Housekeeping Tables from the Database. You can also elect to create new Database and Log Devices or use existing devices.' At the bottom of the dialog, there are three buttons: 'Cancel', '<< Back', and 'Next >>'. The 'Next >>' button is highlighted with a dashed border.

- ◆ *Specify Database Name* that will be created to house the Documanage housekeeping tables.

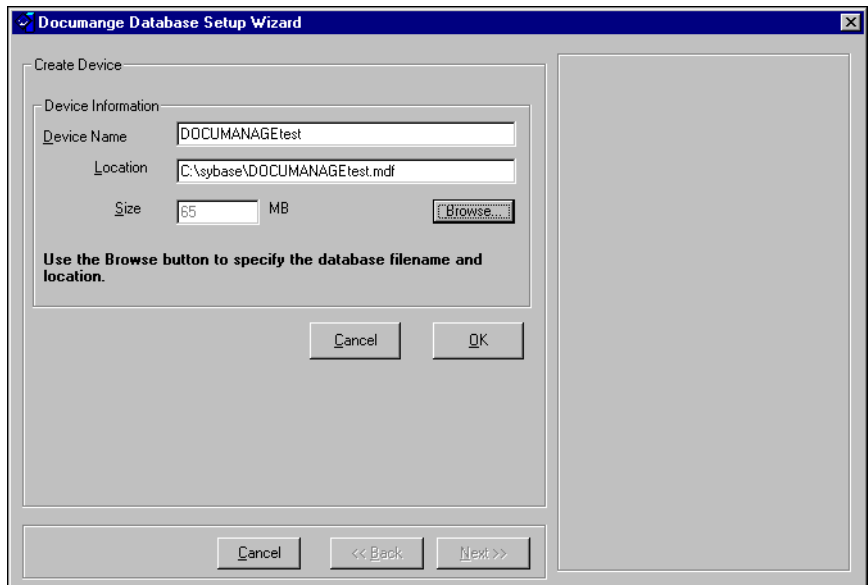
---

**NOTE:** You can also use an existing database but you should make sure that the Documanage tables do not already exist in the database.

---

- 7 **You can also specify a *Data Device* and a *Log Device* for the database. You can either use existing devices or create new devices by selecting <<new>> from the list.**

If you select the <<new>> device option, the *Create Device* dialog appears.



---

**NOTE:** You must specify the *Device Name* and disk *Location*. The device *Size* will be predetermined by the values you specified earlier.

---

## Database

### Documanage Database Wizard

- 8 Click **OK** to return the previous screen, or click **Cancel** to not set up a device for creation.

**NOTE:** If the device you are attempting to create already exists, an error message appears.

The *Database Info* dialog appears.

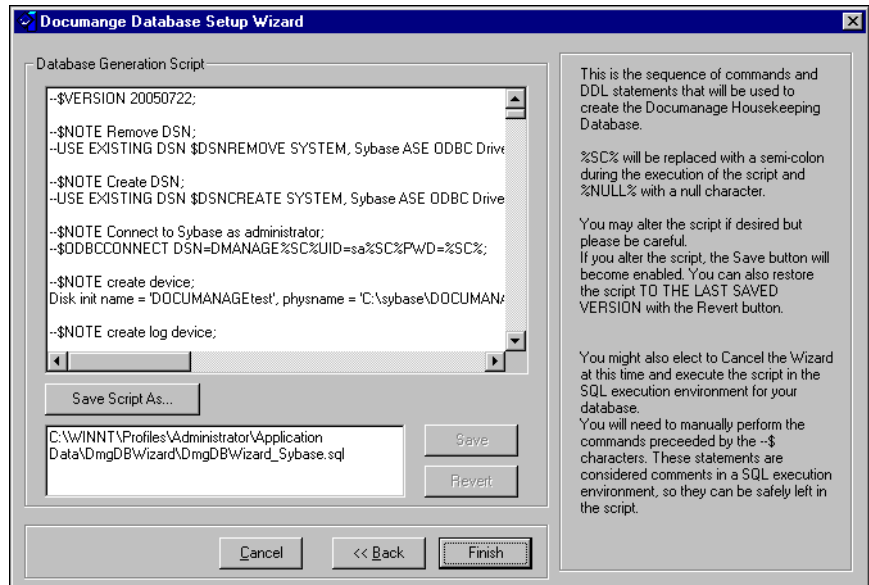
The screenshot shows the 'Documanage Database Setup Wizard' dialog box. It is divided into two main sections: 'Sybase Database Information' and a right-hand panel with explanatory text. The 'Sybase Database Information' section is further divided into 'Database Info' and 'Target Location'. In the 'Database Info' section, the 'Database Name' is set to 'DMANAGE' in a dropdown menu, and the 'Use existing Database' checkbox is unchecked. In the 'Target Location' section, the 'Data Device' is set to 'NEW: DOCUMANAGETest' in a dropdown menu, with a 'Size (MB)' of 65 and a 'Location' of 'C:\sybase\DOCUMANAGETest.mdf'. The 'Log Device' is set to 'NEW: DOCUMANAGETestLog' in a dropdown menu, with a 'Size (MB)' of 10 and a 'Location' of 'C:\sybase\DOCUMANAGETestLog.ldf'. The right-hand panel contains text explaining that this is the database for Documanage Housekeeping Tables and that a new database will be created. It also mentions the option to use an existing database. At the bottom of the dialog are three buttons: 'Cancel', '<< Back', and 'Next >>'. The 'Cancel' button is highlighted with a dashed border.

Specify the:

- ◆ *Database Name*
- ◆ *Data Device*
- ◆ *Log Device*

9 Click **Next >>**.

The *Database Generation Script* dialog appears.



**NOTE:** Based on the options that you have specified, the Wizard creates a table generation script. You can review and alter the script before the database management system executes it, although you should be very careful when you do so. You can also save the script and execute it in the appropriate SQL execution environment for your target database. If you do, you may have to perform certain actions manually (the creation of the DSN connection, for instance). The actions performed by the Wizard will be evaluated as comments and will not be executed.

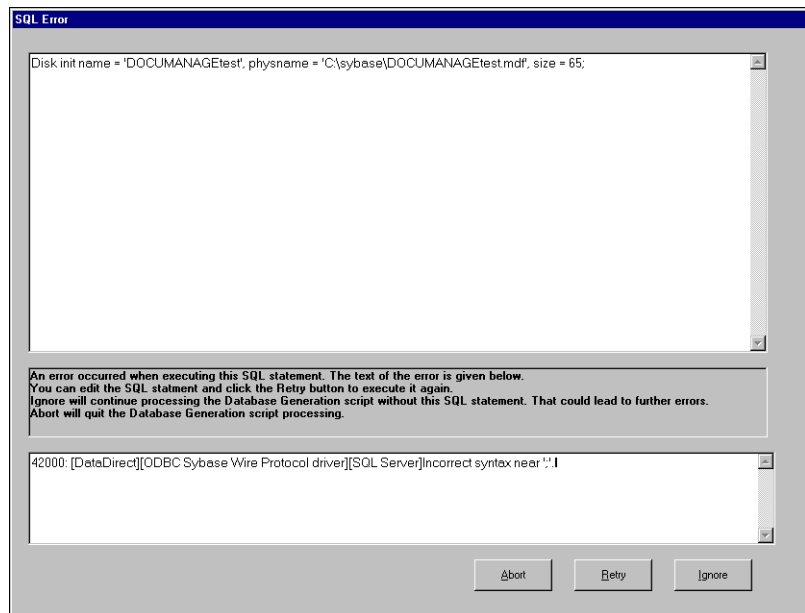
## Database

### Documanage Database Wizard

#### 10 Click **Finish** to generate the Documanage housekeeping tables.

The *SQL Error* dialog appears if an error is encountered while executing a SQL statement.

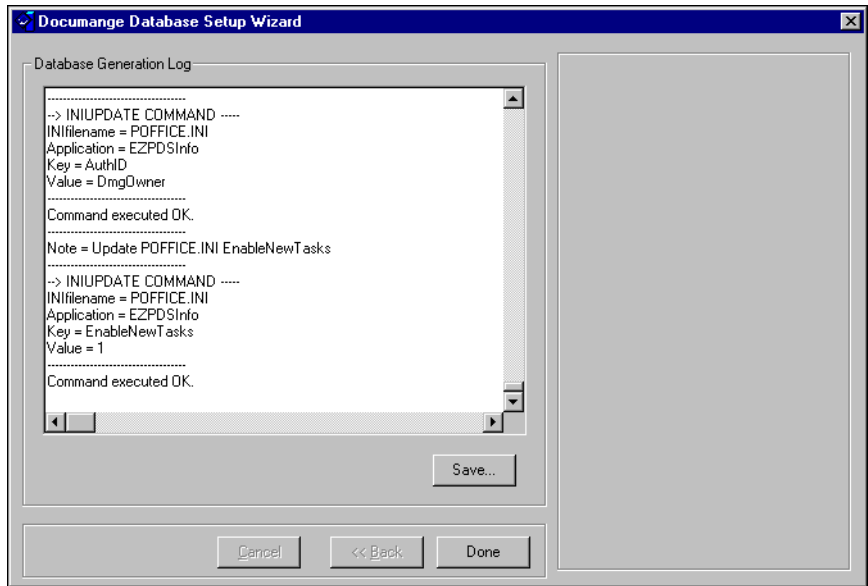
**NOTE:** This dialog should never appear with scripts provided by Skywire Software. However, if you have altered the table generation script this dialog may allow you to correct any errors introduced there.



- ◆ Clicking *Abort* stops the execution of the script.
- ◆ You can correct an SQL statement and click *Retry*.
- ◆ If you click *Ignore*, the SQL statement will not be executed and the script will continue running.

**11 When the script has finished executing you can view the activity log.**

The *Database Generation Log* dialog appears. It displays a record of the actions performed by the Wizard.



## Database

### Open Database Connectivity interface

---

**12 Click *Save...* to save the log to disk.**

**13 Click *Done* to quit the application.**

## Open Database Connectivity interface

The Documange Router and Server connect to the Documange database using an Open Database Connectivity (ODBC) interface. You must install an ODBC interface with the Documange database before you install the Documange Router and Server(s). These databases may be installed on computers running Windows or running UNIX compatible operating systems.

### Obtaining ODBC Drivers

ODBC drivers are widely available for applications like Documange. A Database Management System vendor may provide its own ODBC drivers or advise you to obtain commercial drivers from a third party. You may also use the drivers supplied with Microsoft Windows. Follow your DBMS vendor's recommendations and use the driver set up programs and instructions provided with the driver installation package.

### Data Source Names

You must create an ODBC data source name (DSN) which uses the appropriate driver settings for each database to be used with Documange. Set up any DSN to be used for Documange as a "System DSN" that is available to all user accounts including system services like Documange Services.

Documanager expects the Documanager housekeeping (or management) tables to be accessible via a DSN named "DMANAGE" by default. You can change the DSN by making entries in the poffice.ini file and in the database.

See the Documanager Administrator's Guide for more information.

## Managing the ODBC interface in Windows

The Data Sources ODBC tool manages the ODBC interface in Windows. It can be found either as a Control Panel or an Administrative Tool under the Start menu, depending on the version of Microsoft Windows running on your computer. Installed drivers are listed in this tool.

## Managing the ODBC interface for UNIX Compatible Operating Systems

Skywire Software has arranged to supply UNIX compatible ODBC drivers for use with Documanager. This section provides information on configuring these drivers for different database systems. This section shows how to configure the data source name in the **odbc.ini** file which resides in the **documanager** directory. There are default configurations in the odbc.ini file for each of the databases supported, however these must be updated to reflect your database and network setup.

### ODBC.ini File Configuration for Oracle

The following odbc.ini file entries must be updated for Oracle.

- ◆ HostName (*no default, must be specified*)
- ◆ PortNumber (*default is 1521*)
- ◆ System ID (*no default, must be specified*)

## Database

Open Database Connectivity interface

---

### Example:

```
[Oracle Wire Protocol]
Driver=../odbc/lib/DOora23.so
Description=DataDirect 5.3 Oracle Wire Protocol
AlternateServers=
ApplicationUsingThreads=1
ArraySize=60000
AuthenticationMethod=1
CachedCursorLimit=32
CachedDescLimit=0
CatalogIncludesSynonyms=1
CatalogOptions=0
ConnectionRetryCount=0
ConnectionRetryDelay=3
DefaultLongDataBuffLen=1024
DescribeAtPrepare=0
EnableDescribeParam=0
EnableNcharSupport=0
EnableScrollableCursors=1
EnableStaticCursorsForLongData=0
EnableTimestampWithTimeZone=0
EncryptionMethod=0
GSSClient=native
HostName=
HostNameInCertificate=
KeyPassword=
KeyStore=
KeyStorePassword
LoadBalancing=0
LocalTimeZoneOffset=
LockTimeOut=-1
```

```
LogonID=
Password=
PortNumber=
ProcedureRetResults=0
ReportCodePageConversionErrors=0
ReportRecycleBin=0
ServerName=
ServerType=0
ServiceName=
SID=
TimestampEscapeMapping=0
TNSNamesFile=
TrustStore=
TrustStorePassword=
UseCurrentSchema=1
ValidateServerCertificate=1
WireProtocolMode=1
```

## ODBC.ini File Configuration for IBM DB2

The following odbc.ini file entries must be updated for IBM DB2.

- ◆ Database (*default DMANAGE*)
- ◆ IPAddress (*no default, must be specified*)
- ◆ TcpPort (*default is 50000*)

## Database

Open Database Connectivity interface

---

### Example:

```
[DB2 Wire Protocol]
Driver=./odbc/lib/D0db223.so
Description=DataDirect 5.3 DB2 Wire Protocol
AddStringToCreateTable=
AlternateID=
AlternateServers=
ApplicationUsingThreads=1
AuthenticationMethod=0
CatalogSchema=
CharsetFor65535=0
#Collection applies to z/OS and iSeries only
Collection=
ConnectionRetryCount=0
ConnectionRetryDelay=3
#Database applies to DB2 UDB only
Database=
DefaultIsolationLevel=1
DynamicSections=200
EncryptionMethod=0
GrantAuthid=PUBLIC
GrantExecute=1
GSSClient=native
HostNameInCertificate=
IpAddress=
LoadBalancing=0
#Location applies to z/OS and iSeries only
Location=
LogonID=
Password=
PackageCollection=NULLID
```

```
PackageOwner=  
ReportCodePageConversionErrors=0  
TcpPort=50000  
TrustStore=  
TrustStorePassword=  
UseCurrentSchema=1  
ValidateServerCertificate=1  
WithHold=1  
XMLDescribeType=-10
```

## ODBC.ini File Configuration for SQL Server

The following odbc.ini file entries must be updated for SQL Server.

- ◆ Address = ServerName(*no default, must be specified*),
- ◆ Database (*default DMANAGE*)
- ◆ TcpPort (*default is 1433*)

### Example:

```
[SQLServer Wire Protocol]  
Driver=./odbc/lib/DOmsss23.so  
Description=DataDirect 5.3 SQL Server Wire Protocol  
Address=  
AlternateServers=  
AnsiNPW=Yes  
ConnectionRetryCount=0  
ConnectionRetryDelay=3  
Database=  
LoadBalancing=0  
LogonID=  
Password=
```

## Database

Open Database Connectivity interface

---

```
QuotedId=No
SnapshotSerializable=0
```

### ODBC.ini File Configuration for Sybase

The following odbc.ini file entries must be updated for Sybase.

- ◆ Database (*default DMANAGE*)
- ◆ NetworkAddress = ServerName (*no default, must be specified*),
- ◆ TcpPort (*no default, must be specified*)

#### Example:

```
[Sybase Wire Protocol]
Driver=./odbc/lib/DOase23.so
Description=DataDirect 5.3 Sybase Wire Protocol
AlternateServers=
ApplicationName=
ApplicationUsingThreads=1
ArraySize=50
AuthenticationMethod=0
Charset=
ConnectionRetryCount=0
ConnectionRetryDelay=3
CursorCacheSize=1
Database=
DefaultLongDataBuffLen=1024
EnableDescribeParam=0
EnableQuotedIdentifiers=0
EncryptionMethod=0
GSSClient=native
HostNameInCertificate=
```

```
InitializationString=  
Language=  
LoadBalancing=0  
LogonID=  
NetworkAddress=  
OptimizePrepare=1  
PacketSize=0  
Password=  
RaiseErrorPositionBehavior=0  
ReportCodePageConversionErrors=0  
SelectMethod=0  
ServicePrincipalName=  
TruncateTimeTypeFractions=0  
TrustStore=  
TrustStorePassword=  
ValidateServerCertificate=1  
WorkStationID=
```

## Database

Open Database Connectivity interface

---

# Services

This chapter describes how to install the Router, Server, and Administrator applications on Windows and on UNIX compatible operating systems.

---

## In this chapter

The information in this chapter helps you answer the following questions:

- ◆ How do you install and configure the Documanage Router, Server and Administrator on Windows and on UNIX compatible operating systems?
- ◆ How do you separately install the Documanage Administrative Tools?
- ◆ How do you install full text search?

---

**NOTE:** Screen captures may contain differences in colors and/or version major and minor revisions than the installation you run: unless otherwise noted, the installation steps and configuration are still the same.

---

## Services

Installing the Server, Router and Administrative Tools

---

# Installing the Server, Router and Administrative Tools

You can install the Server and Router on Windows or on UNIX compatible operating systems. The Administrator is only available for Windows.

## Installing the Server Router and Administrative Tools on Windows

See “Installation components” on page 18 for more information about installing and configuring the Router and Server.

Using the procedure that follows, you can install the Router, the Server, and the Administrative Tools, or any combination of these components.

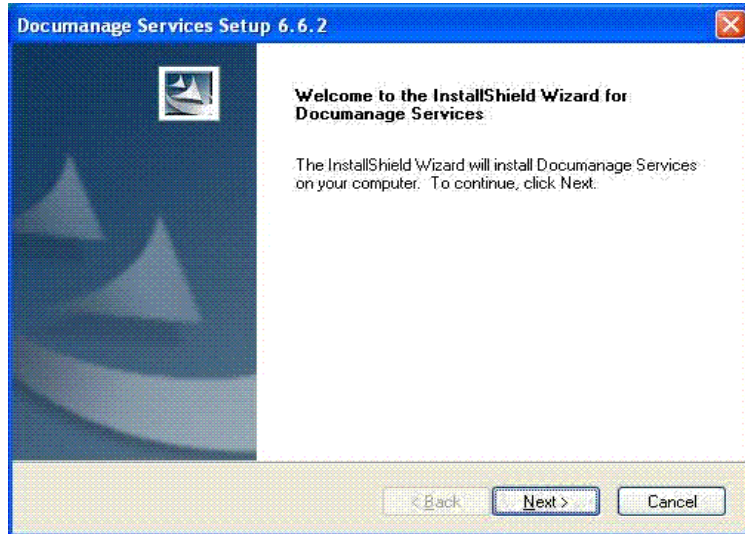
---

**NOTE:** If you are doing an upgrade, create a copy of Documanager’s existing `poffice.ini` file and rename it so that the Documanager installer cannot overwrite it. After the installation is complete, you can substitute the `poffice.ini` file you have copied for the one created by the installer. The `poffice.ini` file is stored in the operating system directory. Appendix B of the Administrator’s Guide defines the variables in `poffice.ini`, and their default values.

---

- 1 **Launch the Documange Services installer application, *DocumangeServices.exe*.**

InstallShield extracts files into your temporary directory and runs Documange Services Setup. The *Documange Services Setup* dialog appears.

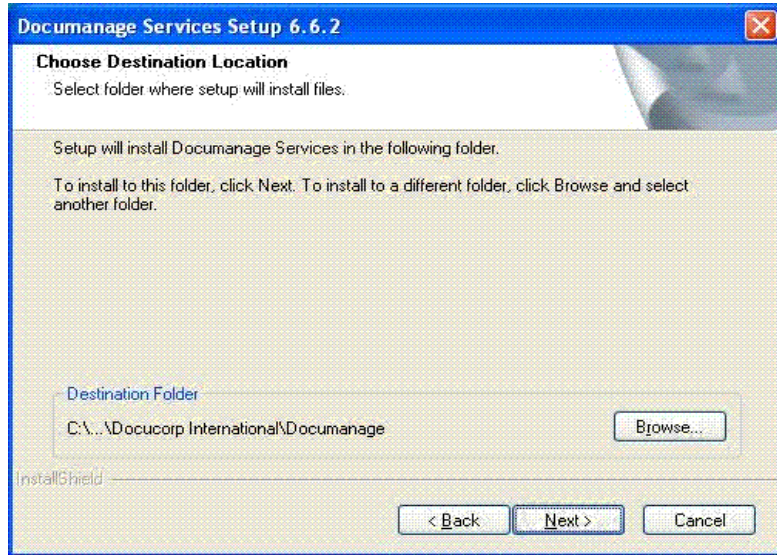


## Services

Installing the Server, Router and Administrative Tools

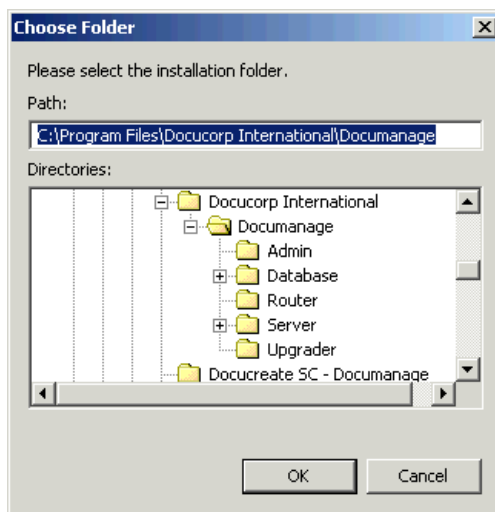
---

- 2 The **Choose Destination Location** dialog appears.



- 3 Accept the default Destination Folder or click **Browse ...** and use the **Choose Folder** dialog to select a folder into which you want to

### install Documange.

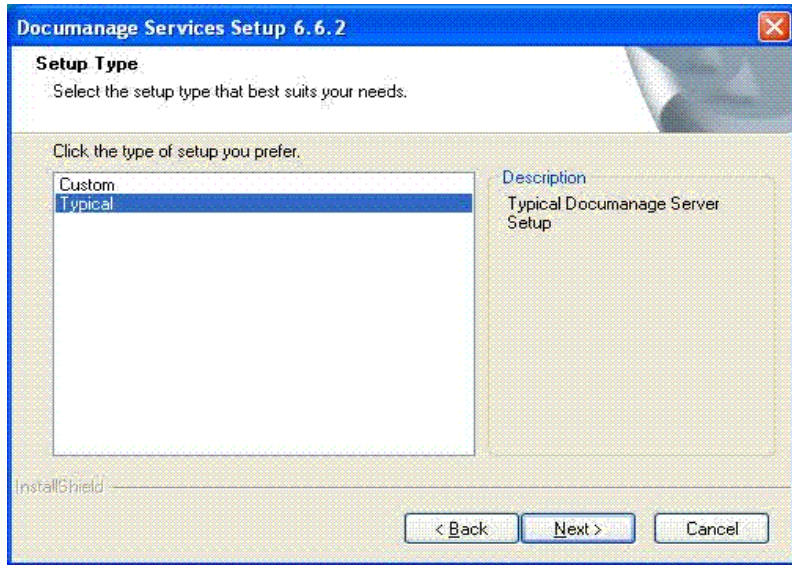


## Services

Installing the Server, Router and Administrative Tools

---

**4 Click *Next*. The *Setup Type* dialog appears.**



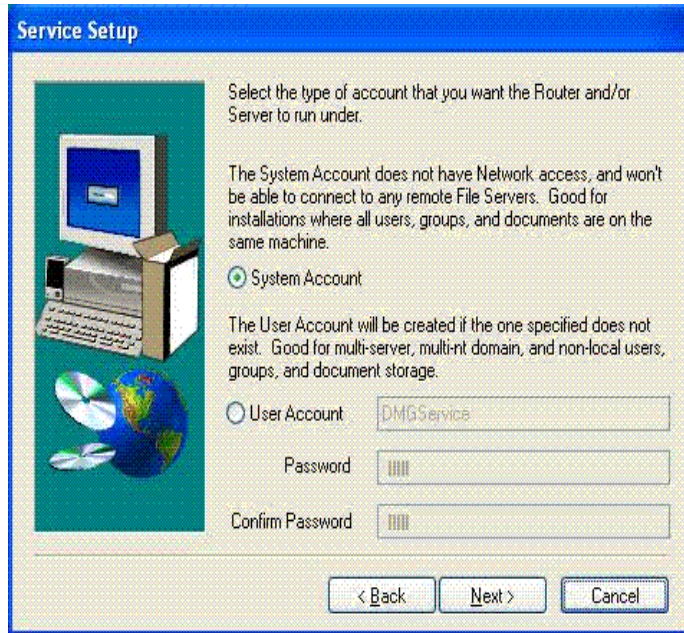
**5 Select the type of setup by clicking (and highlighting) *Custom* or *Typical*. Click *Next*.**

- ◆ *Typical*—If you select *Typical*, the Services Setup dialog appears. Go to “Step 13”. *Typical* is a good choice if you are installing Documanage Server, Router and Administrator applications on a single server.
- ◆ *Custom*—If you select *Custom*, the Select Components dialog appears. Go to “Step 7”.

---

**NOTE:** A *Typical* installation includes all of the Server, Router and Administrator components except for the Docucorp Compound Documents (DCD) Filter for the Microsoft Index Server. To install this application you must perform a *Custom* installation.

---



- 6 **Select *System Account* if you are installing the server, router and database on the same machine and users will be defined as part of a Group on the that machine. Select *User Account* if Documanage users will be defined within a Microsoft Windows Domain (or Active Directory). If you select *User Account*, enter the *User Account* and *Password* for Documanage.**

- ◆ For information on how to set up user authentication under Windows, refer to “Appendix B: Windows Authentication” on page 141

---

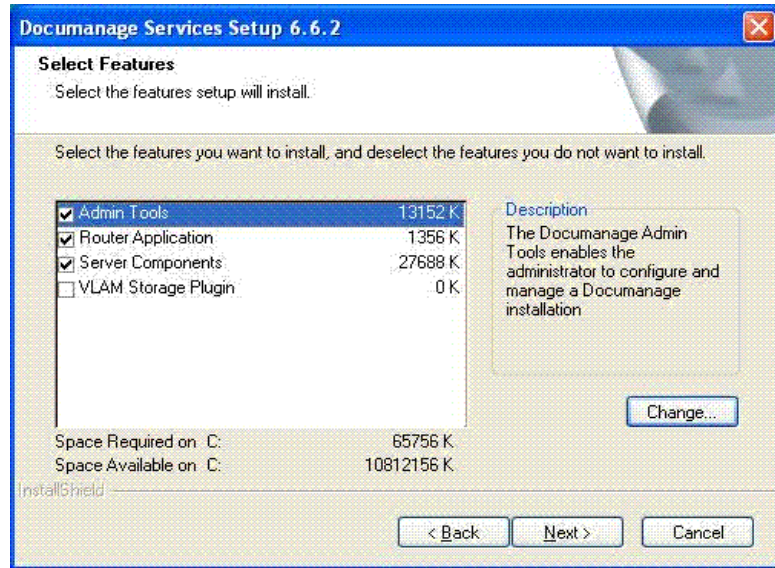
**NOTE:** Choose *Custom* to install a system with the Router and Server on separate computers, to install a second server computer or to install the Administration components on a computer without the servers.

---

## Services

### Installing the Server, Router and Administrative Tools

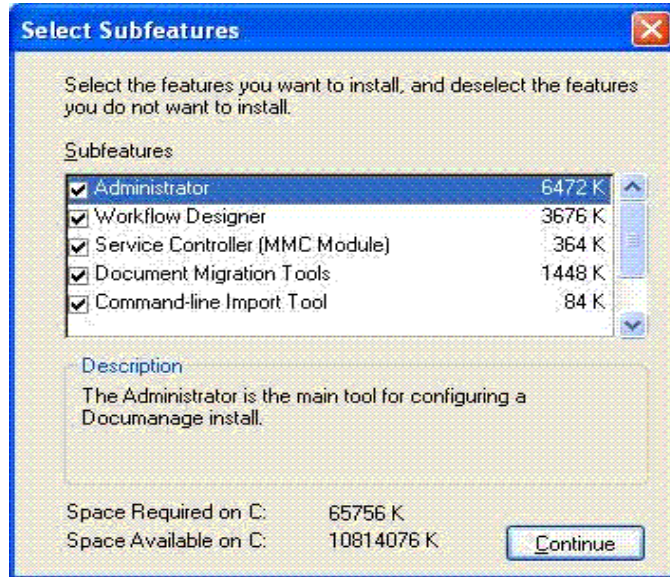
---



- 7 **In the Select Components dialog, select one or more of the following components:**
  - ◆ **Admin Tools**—*Admin Tools* enable the administrator to configure and manage a Documanage Installation.
  - ◆ **Router Application**—The *Router* is the resource director for Documanage Servers. You must install at least one Router in your system.
  - ◆ **Server Components**—The Server is the data manager between the Workstation (Client) and the Databases.
  - ◆ **VLAM Storage Plugin** – Installs VLAM storage plugin. Does not install CommCommander dlls, you must install those separately.
- 8 **Highlight one of the components you have selected. Click *Change*.** A *Select Subcomponents* dialog appears.

9 **Select one or more of the following subcomponents. Click *Continue*.**

**Admin Tools**—The administrator configures and manages a Documange Installation using the Admin Tools.



- ◆ **Administrator**—The Administrator is the main tool for configuring a Documange installation.
- ◆ **Workflow Designer**—The Workflow Designer creates and modifies workflows.
- ◆ **Service Controller**—The Service Controller is a Microsoft Management Console (MMC) module that remotely starts and stops Documange Services.
- ◆ **Document Migration Tools**—The Document Migration Tools move documents from one storage volume to another.
- ◆ **Command-line Import Tool**—DMImport is a command line tool that imports documents into Documange.

## Services

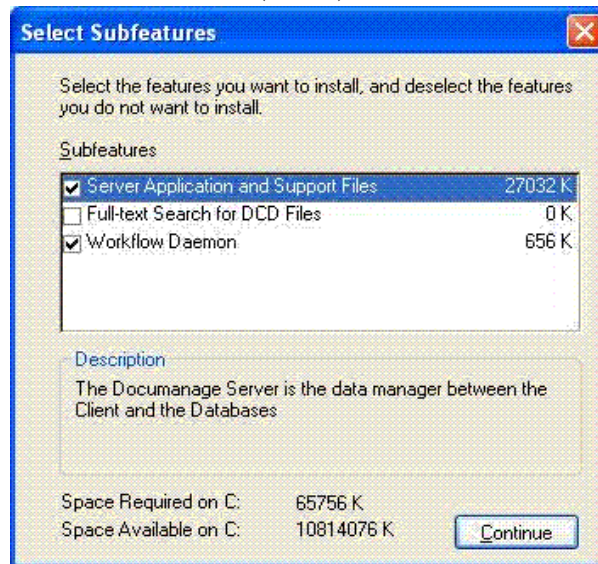
Installing the Server, Router and Administrative Tools

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- ◆ **Diagnostics Utility**—dmg\_dbscan is a cross-platform utility that scans the Documange database by performing specified tests to provide required information or reports or check for data integrity.

**Router Application**—The Documange Router is the resource director for Documange Servers. The Router application has no subcomponents.

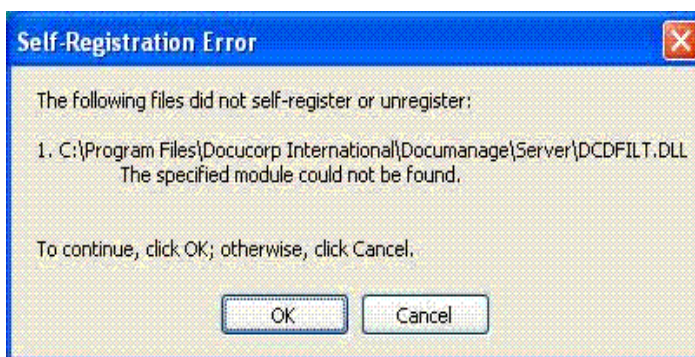
**Server Components**—The Documange Server is the data manager between the Workstation (Client) and the Databases.



- ◆ **Server Application and Support Files**—The Documange Server is the data manager between the Workstation and the Databases.
- ◆ **Full-text Search for DCD Files**—Include the Documange Compound Document (DCD) filter for the Microsoft Index Server if you wish to perform full text searches on DCD files.

**CAUTION:** To perform full text searches on DCD files, you must install Skywire Software's Common Objects before installing the Microsoft Index Server filter for DCD files. If Common Objects are not installed first, full text search will be disabled and you will get the error messages shown here.

---



---

**NOTE:** To install Common Objects, run the Common Objects installer that comes with Docuflex Studio. You can download Docuflex Studio from your installation media or from the Skywire Software Online Support System web site.

---

- ◆ **Workflow Daemon**—The Documanage Workflow Daemon is a program that aids in automation workflow tasks that might normally be completed by human users. It can be run either as an NT service or as a console application. The daemon application logs into the Documanage Server with a user account, periodically checks the logged-in user's inbox for pending tasks and runs custom-programmed rules to process each task. The daemon application may

## Services

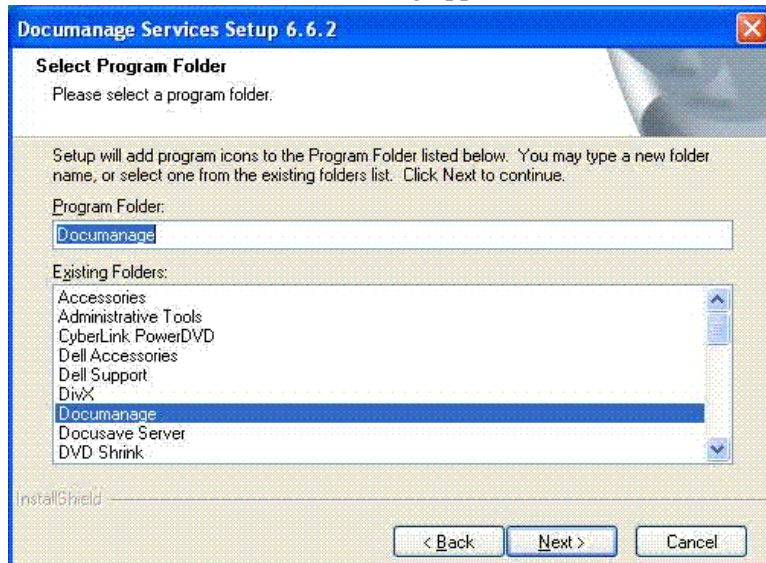
### Installing the Server, Router and Administrative Tools

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be installed on any computer acting as a client to the Documange Server.

- 10 Repeat “Step 8” and “Step 9” until you have selected all of the components and subcomponents you wish to install. Click **Next**.

The *Select Program Folder* dialog appears.



- 11 Select the program folder to which Documange adds its icon. The default folder is **Documange**. Click **Next**.

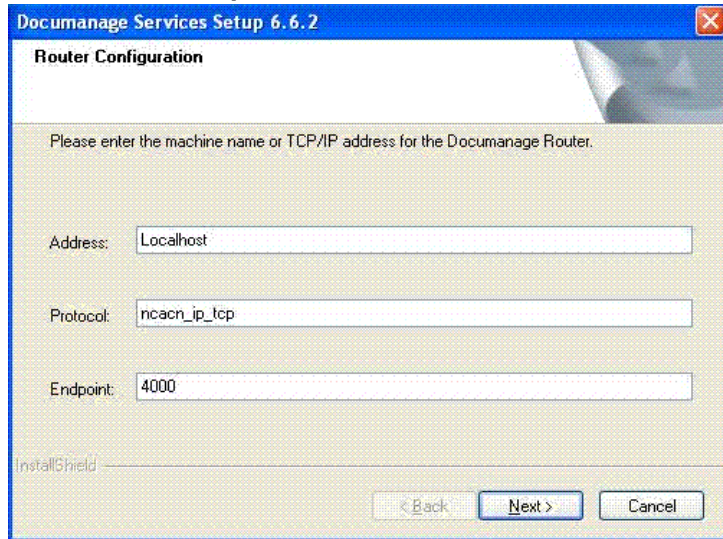
---

**NOTE:** Setting the *Startup Type* to *Automatic* starts the server service when your computer comes up. Leaving it set to *Manual* requires you to start the Server using the Documange Services Controller or the Services control panel.

When you install the Server on a computer where Documange has never been installed, *Startup Type* defaults to *Manual*. Once you have installed the Server and set up your database connections, you may

wish to change the *Startup Type* to *Automatic* using the Services control panel.

- 12 **The Router Configuration dialog appears. Enter the Address, Protocol, and Endpoint for the Router. Click Next.**



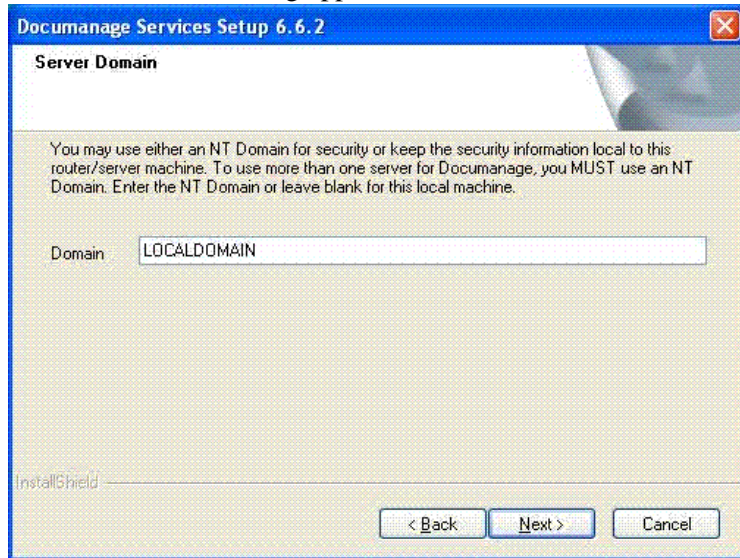
- ◆ **Address:** —the IP Address or the machine name of the computer on which you are installing the Documanage Services software. Ask your system administrator to find out which one to use.
- ◆ **Protocol:** —the default Documanage protocol used by Documanage is TCP\IP. Other options include NetBIOS over TCP, NetBIOS over IPX, NETBEUI, Pipes, and SPX.
- ◆ **Endpoint:** —the default Windows port used by Documanage. Before you change the port from the default, talk with your network administrator.

## Services

Installing the Server, Router and Administrative Tools

---

The *Server Domain* dialog appears.



- 13 Enter the *Domain* name that controls user authentication for Documanage. If the name is left blank, authentication will be done locally. Click *Next*.**

---

**NOTE:** This is the domain controller or host that defines Documanage security. Refer to the security model you selected in “Security Models.”

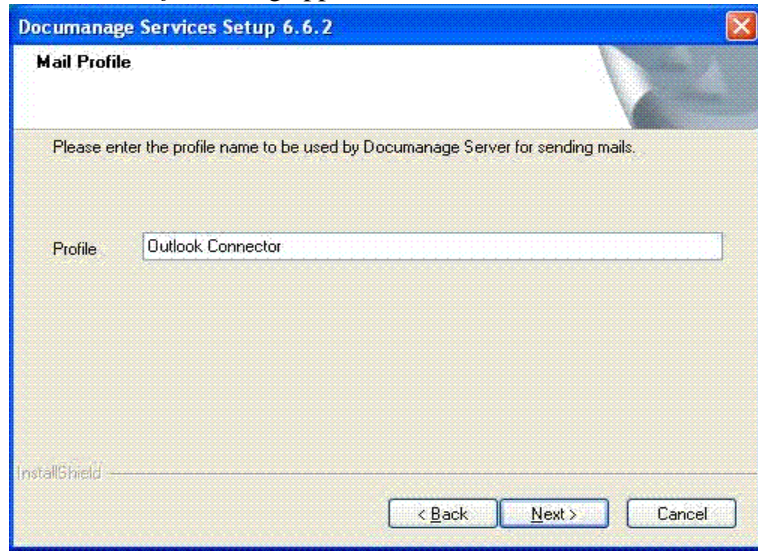
---

---

**NOTE:** In Windows 2000, domain names are case-sensitive. When you enter domain names into .ini files and login dialogs they must be spelled out—but not capitalized—exactly as they appear in the directory.

---

The *Mail Profile* dialog appears.



- 14 **Enter the MAPI *Profile* name that the Workflow Auto Mail feature will use for sending E-mail. Click *Next*.**

MAPI is an acronym for Messaging Application Programming Interface. MAPI is an interface standard that allows client programs to perform e-mail messaging. Documanage Workflow uses the Mail Profile to call MAPI routines that interface with messaging systems and message stores.

- 15 **From the Catalog dialog, accept the default *Destination Folder* if you have a Microsoft Index Server, or browse to the folder where you want to put index catalogs for the server. Click *Next*.**

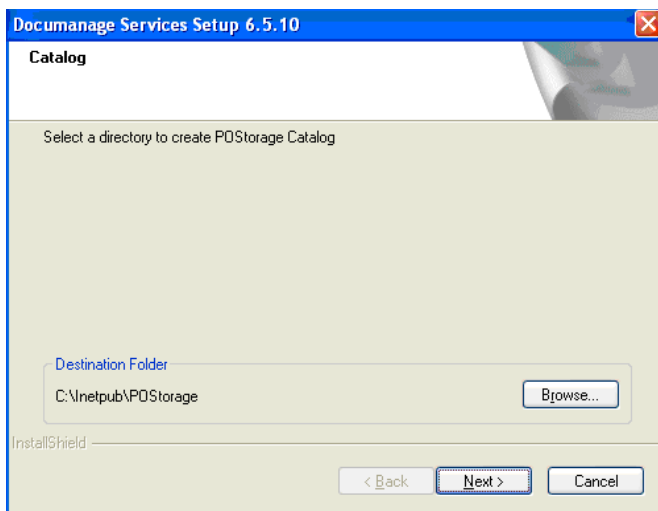
## Services

Installing the Server, Router and Administrative Tools

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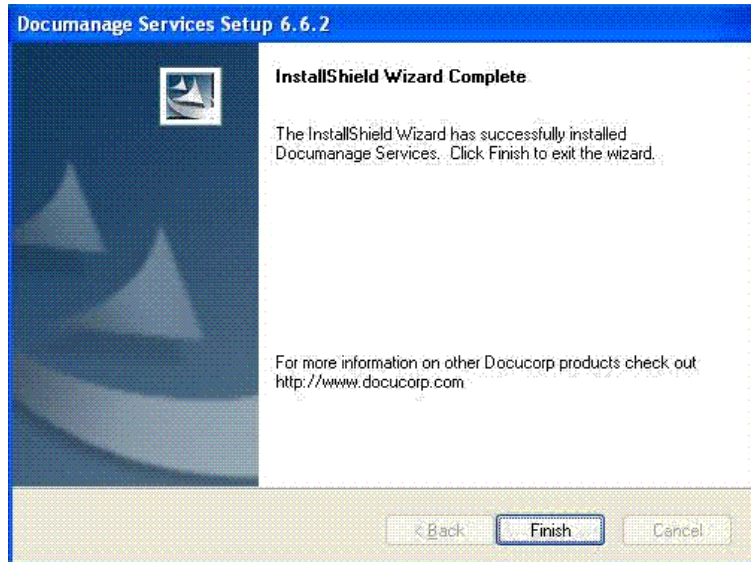
**NOTE:** The location you specify here maintains catalogs for the Microsoft Index Server. These catalogs enable full text search for documents.

---



- 16 Once you click Ok, you will see the ***InstallShield Wizard Complete*** dialog.

Click *Finish*.



- 17 Reboot your system and run the Database Updater if required.

## Services

Installing the Server, Router and Administrative Tools

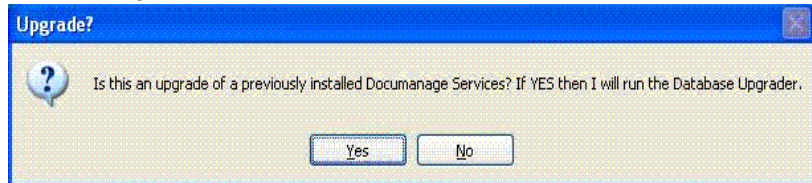
---

### Upgrading the Documanage Database

The Documanage Database Updater upgrades the tables in the Documanage database so that the database schema matches an upgraded installation of Documanage. If you had an earlier version of Documanage installed, you must use the Database Updater, which only runs under Windows.

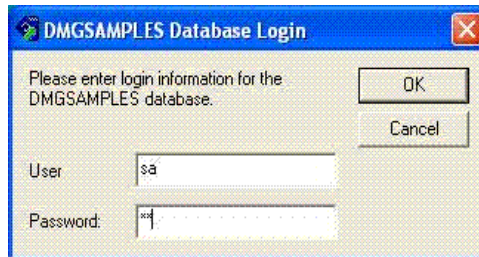
**1 Click *Next*.**

A message appears asking if this is an upgrade of a previously installed Documanage Service.



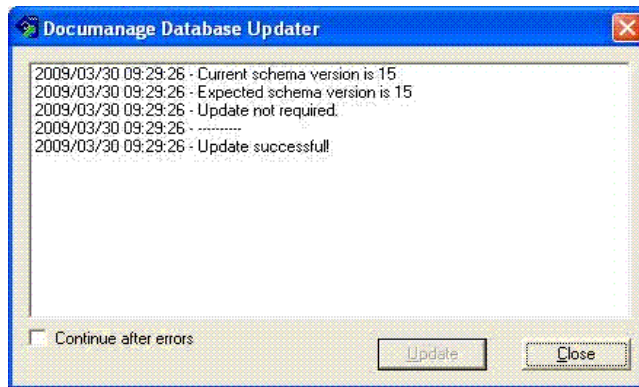
**2 Select *Yes* if you are upgrading an existing Documanage Service.**

You will be prompted for each Documanage database.



- 3 Enter the **User name** and **Password** for your databases in the **Documanage** system and click **OK**.

The *Documanage Database Updater* dialog appears.



- 4 Click **Update**.

The Documanage Database Updater dialog window lists messages from the Updater.

---

**CAUTION:** Do not select *Continue after errors* without the cooperation of Skywire Software customer support. Allowing the Database Updater to continue after an initial error can compromise its ability to resolve subsequent errors.

---

- ◆ When the update is complete, an *Update successful* message appears.
- ◆ If the database is already updated, an *Update not required message* appears and the Updater becomes unavailable.

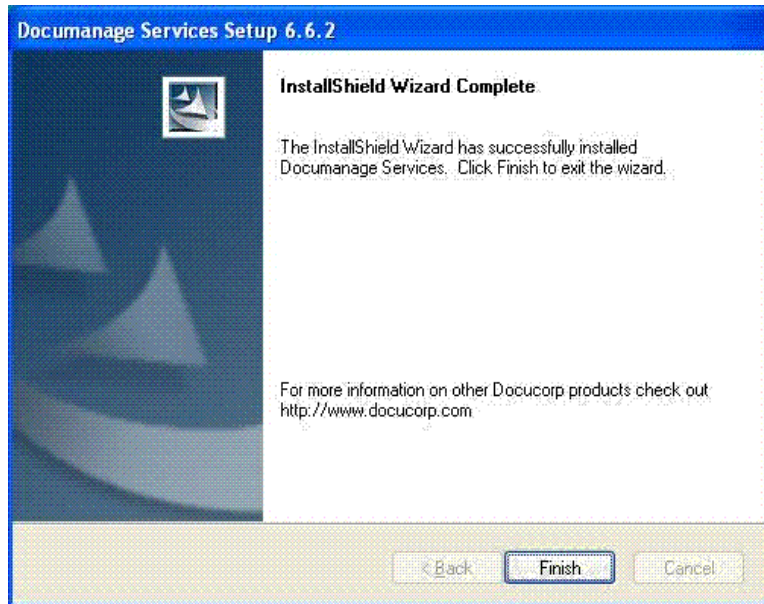
## Services

Installing the Server, Router and Administrative Tools

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**NOTE:** You can run the updater at any time from:  
Start | Programs | Documanager | Database Updater in the Start menu,  
or from: C:\Program Files\Docucorp  
International\Documanager\Updater.exe in Explorer. Click *Finish*.

---



5 Click *Finish*.

## Installing the Router and Server on a UNIX Compatible Operating System

The Documanage Router and Server files must be installed in the same directory on your UNIX compatible system. The Documanage system administrator and the operating system administrator should determine the name and location of this directory.

The installation files have .tar.gz extensions, indicating that they have been archived into a single directory and then compressed using the tar and gzip utilities respectively.

- 1 **Decompress and extract the installation files into their directory with one of the following commands:**  

```
gunzip -c <filename.tar.gz> | tar -xvf <filename.tar>
```

  - ◆ refer to “Installation files for UNIX operating systems” on page 22 for <filename.tar.gz>
  - ◆ These commands copy the files needed to run Documanage into the ./dmg subdir, as well as installing the Router and Server.
- 2 **After it is installed, edit the poffice.ini file with the desired local settings.**
- 3 **Set up your environment to start the router and server as daemons so that they support the DataDirect ODBC drivers.**
  - ◆ Type ./start\_dmgrouter to run the router configuration script
  - ◆ Type ./start\_dmgservice to run the server configuration script
- 4 **To start the Router and Server as foreground applications type:**
  - ◆ ./pomainservice
  - ◆ ./poserverservice

## Services

Separately Installing Administrative Tools on Windows

---

**5 To start the Router and Server as background applications type:**

- ◆ `./pomaindaemon`
- ◆ `./poserverdaemon`

## Separately Installing Administrative Tools on Windows

If you are not licensing the Windows Server, the same Documange Administrative applications that are available in the full Windows Services installer are also available in a separate Administrative installer.

**1 Launch DocumangeServices.exe or DocumangeAdmin.exe to run setup.**

The *Welcome to the InstallShield Wizard for Documange Administrator* dialog appears.

**2 Click Next.**

The *License Agreement* dialog appears.

**3 Click Yes to accept the Licensing Agreement.**

The *Choose Destination Location* dialog appears.

- 4 **Select the folder into which you want to install the Documanage Admin folder. Click *Next*.**
- 5 **Select the *Setup Type*. To install all Admin components, choose *Typical*. To pick individual applications to install, choose *Custom*. Click *Next*.**
- 6 **Select from among the components in the *Admin Tools* package:**
  - ◆ **Administrator**—The Administrator is the main tool for configuring a Documanage installation.
  - ◆ **Workflow Designer**—The Workflow Designer creates and modifies workflows.
  - ◆ **Service Controller**—The Service Controller is a Microsoft Management Console (MMC) module that remotely starts and stops Documanage Services.
  - ◆ **Document Migration Tools**—The Document Migration Tools move documents from one storage volume to another.
  - ◆ **Command-line Import Tool**—DMImport is a command line tool that imports documents into Documanage.
  - ◆ **Diagnostics Utility**—dmg\_dbscan is a cross-platform utility that scans the Documanage database by performing specified tests to provide required information or reports or check for data integrity.
- 7 **Click *Next*.**

The installer copies the files to your disk and adds menu items to your Start | Programs | Documanage menu.

## Full-text search on Windows

A full-text search compares every word in a document, instead of searching an abstract or a set of keywords associated with the document. Word processors and text editors, for example, contain full-text search functions that let you find a word or phrase anywhere in a document.

Full-text search is available to Documanage servers running on the Microsoft Windows Server operating system. It is implemented using Microsoft Indexing Service (formerly Index Server), a base service for operating systems since the introduction of Windows 2000. On Windows XP, open Help under the Start menu and search for the *Indexing Service*.

Full-text search supports Docucorp Compound Documents (.dcd) if you install the DCD IFilter using the Services installer. The IFilter extends Indexing Service so it can index DCD documents along with other supported file types. IFilters are available from other vendors for additional file types, including Adobe PDF. These filters are supported by their vendors and may be used with Documanage, but they are not supported by Skywire Software.

## Indexing Service Catalog

Documanage works with an Indexing Service catalog with the reserved name "POStorage." The installer creates this catalog when it sets up Documanage full-text search. Documanage storage volumes that are created and marked in the Administrator as "Indexed" are added as directories under this Indexing Service catalog. Once it has been set up, Indexing Service runs independently of Documanage, automatically indexing all documents in the listed directories in the background. Documanage Server interfaces to the Indexing Service and presents searches as users request them, dynamically combining the results of Documanage folder and document search criteria with the Indexing Service full-text results.

## Enabling Full-Text Search

After you install Microsoft Indexing Service, the following steps enable full-text search in Documanage. These steps configure it to index documents in the directories you have configured as "indexed" storage volumes in Documanage. Proceed as follows:

- 1 Use the Indexing Service management and control interface to create a new Catalog named "POStorage." Refer to the Microsoft documentation for details.**
- 2 In the Documanage Administrator, set the volumes you wish to full-text search as *Indexed* on the *Volumes* tab in the *Storage* dialog. Refer to the Documanage Administrator guide for details.**
- 3 Use the Indexing Service management interface to check whether the Indexing Service has indexed the documents in the directories you have configured in the indexed storage volumes in Documanage.**

---

**NOTE:** To enable full text search, the account that Documanage is run under must be in the Administrator group.

---

## Enabling Full Text Search with Documanage

Installing Documanage enables full-text search capability by default if the target server computer has Microsoft Indexing Service set up and the current user has Administrative privileges. Otherwise, full-text search is disabled. If the installation cannot set up full-text search, it can be enabled later by following the steps given in "Enabling Full-Text Search" on page 119.

## Services

Full-text search on Windows

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# ***Workstation and Application Program Interface***

This chapter describes how to install the Workstation and the Documange Application Program Interface. Currently, the Workstation application is only available for Windows.

## **In this chapter**

The information in this chapter helps you answer the following questions:

- How do you install the workstation application?
- How you install programming and Application Program Interface (API) software?

## Installing the Workstation

The Documange Workstation application is typically installed on machines other than those that run the Server(s), Router(s) and Administrator.

Use the following procedure to install the Documange Workstation.

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**NOTE:** Screen captures may differ in color and/or version numbers from what you are installing. Unless otherwise noted, the setup steps and product configuration remain the same.

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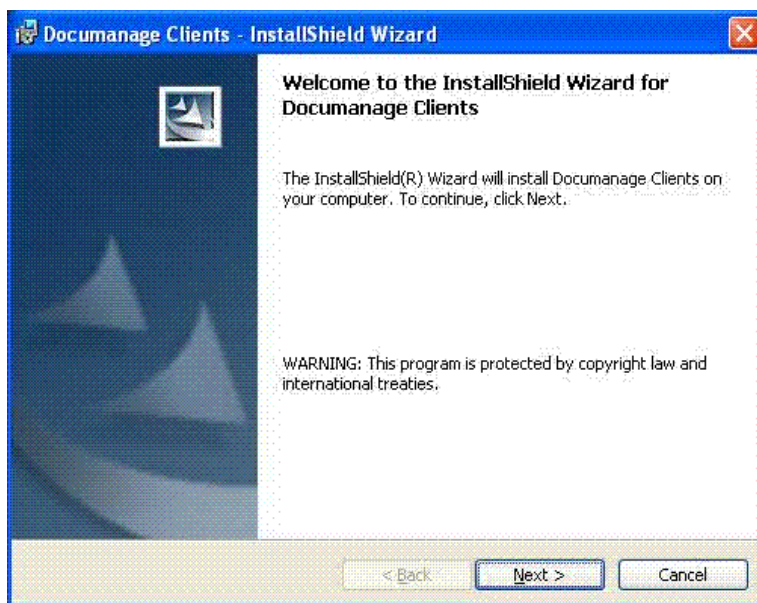
**NOTE:** Close all programs before running the Setup.

---

### To install the Documange Workstation

- 1 Double-click the **DocumangeClients.exe** installation file.

The *Welcome* dialog appears.



**NOTE:** If you are using a Microsoft Windows Installer that is earlier than version 1.2, the Documange Clients Installer may halt installation and proceed to update the Microsoft Windows Installer. You must re-start the Documange Clients Installer once the Microsoft Windows Installer is updated. Similarly, if the XML Parser on the machine is not version 3 service pack 2 (3SP2), the Documange Clients Installer halts installation and proceeds to install Microsoft XML Parser 3 SP2. You must re-start the Documange Clients Installer, once the XML Parser is installed.

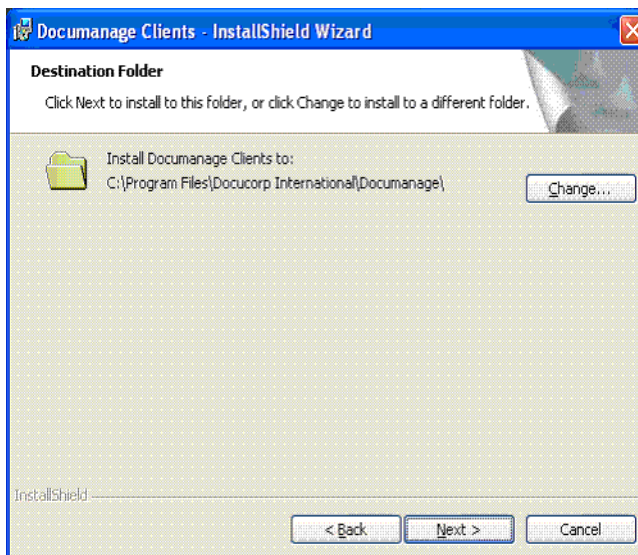
## Workstation and Application Program Interface

### Installing the Workstation

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#### 2 Click **Next**.

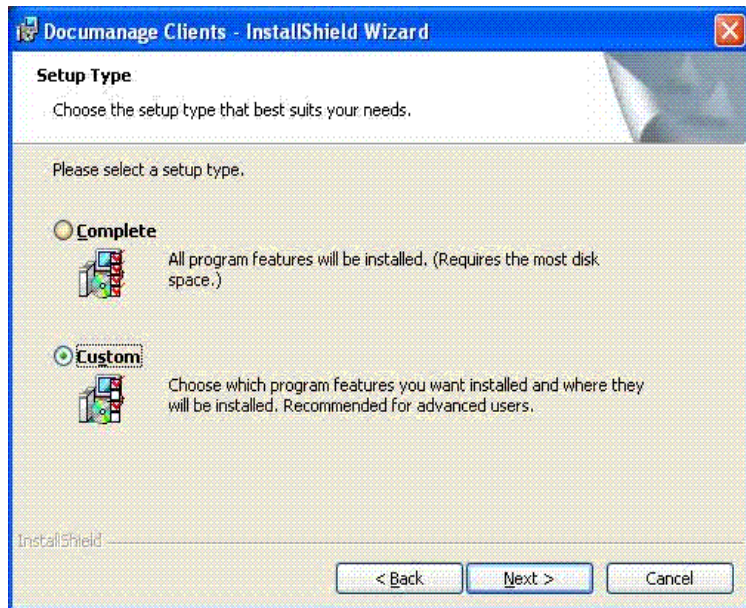
The *Destination Folder* dialog appears.



#### 3 Click **Next** to install Documanage in the default folder, or click **Change...** for the *Change Current Destination Folder* dialog. Use this

dialog to browse to an alternate folder into which you want to install Documanage.

The *Setup Type* dialog appears.



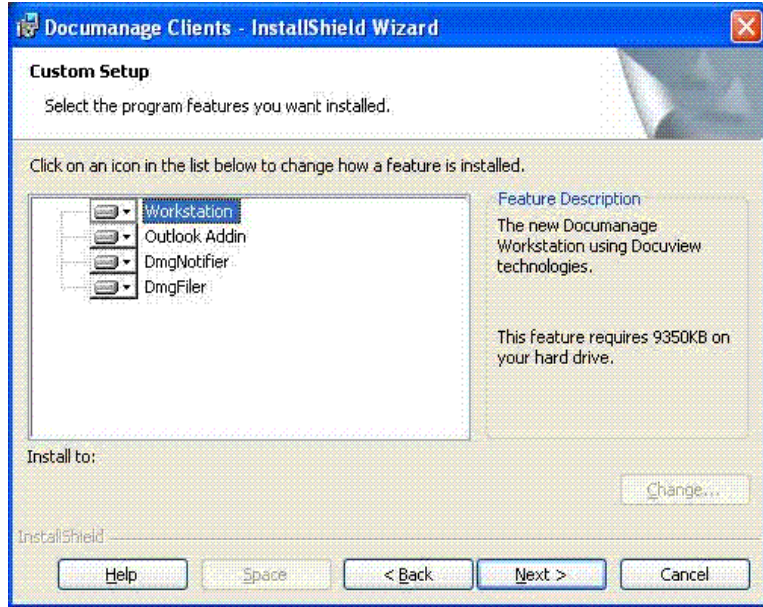
- 4 **Select *Complete* or select *Custom*. Click *Next*.**

If you have selected *Complete*, go to “Step 5” .

## Workstation and Application Program Interface

### Installing the Workstation

If you have selected *Custom*, the *Custom Setup* dialog appears.



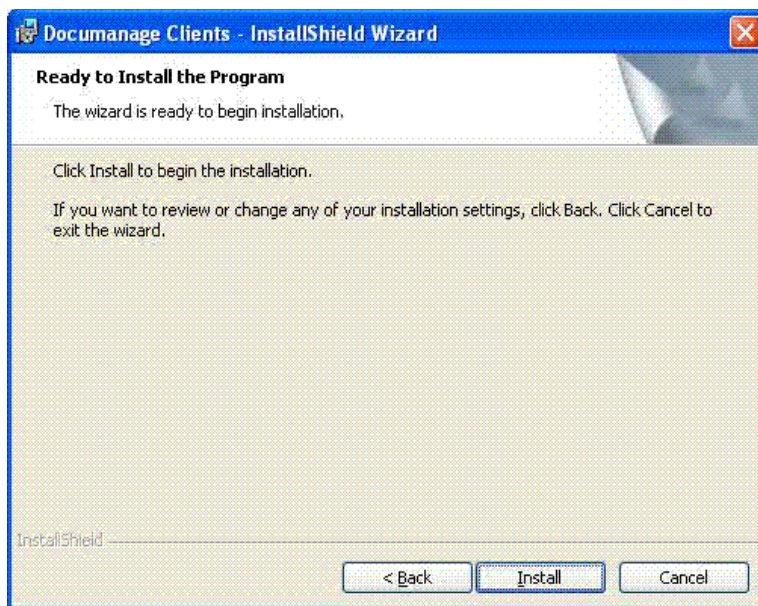
Click on one or more of the following icons for a menu that you can use to specify how a component is to be installed. If you are unsure about what to specify in a menu, click **Help** for the *Custom Setup Tips* dialog.

- ◆ **Workstation**—The Documanage Workstation client application, provides a user interface to the Documanage Server. The main part of the interface is the File Room, which organizes and provides access to Documanage components. These components include Cabinets, Favorite cabinets, Tasks, Viewer Windows, Active Projects, the Watched Folder, and set system and print options.
- ◆ **Outlook Addin**—The Outlook Addin allows users of Microsoft 2000 and 2002 to import email and email attachments into Documanage.

- ◆ **DmgNotifier**—The Documanage User Notification Utility lets you know when you have work pending in Documanage. It changes the color of an icon in the system tray depending on the urgency of the work pending for you in Documanage.
- ◆ **DmgFiler**—The Documanage Filer utility makes it simple to file documents directly into Documanage from any Windows application that can send files to a printer. Windows applications generate TIFF and PDF files using a print driver supplied with Documanage Filer. The Filer then opens a dialog that you use to send these files directly into the Documanage document store.

### 5 Click **Next**.

The Ready to Install the Program dialog appears.



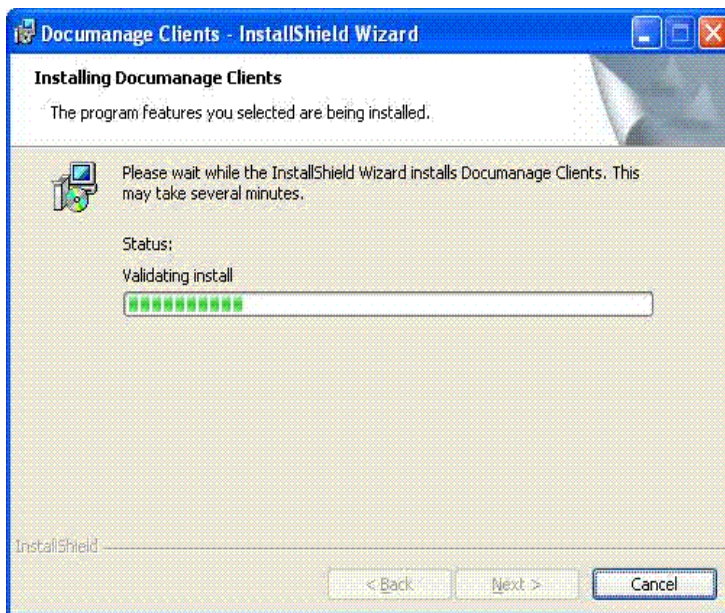
## Workstation and Application Program Interface

Installing the Workstation

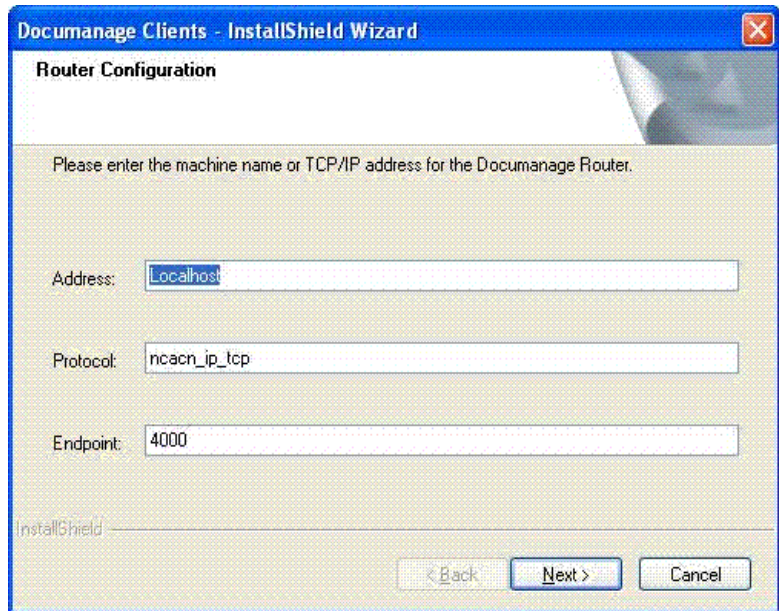
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### 6 Click **Install**.

The *Installing Documange Clients* dialog appears.



- 7 **Setup** installs the Documange client, and then the *Router Configuration* dialog appears.



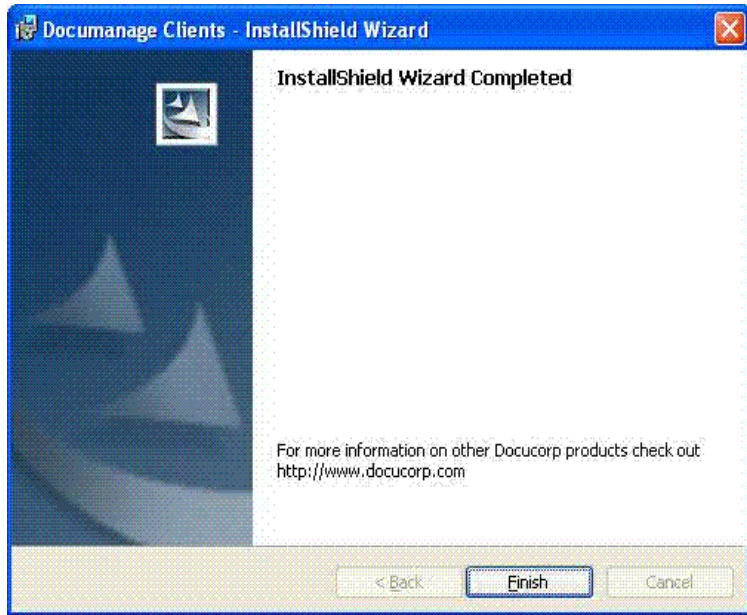
- ◆ **Address**—the TCP/IP address or the machine name where the Documange Router is installed.
- ◆ **Protocol**—the default TCP/IP network protocol. This value is selected automatically. Other support protocols include: NetBIOS over TCP, NetBIOS over IPX, NetBEUI, TCP/IP, Pipes, SPX.
- ◆ **Endpoint**—a TCP/IP network specific value. The default port number used by Documange is 4000.

## Workstation and Application Program Interface

### The Application Program Interface

---

- 8 The *InstallShield Wizard Completed* dialog appears.



- 9 Click *Finish*.

After your workstation reboots, setup will be complete.

## The Application Program Interface

The Workstation installer also installs the Documanage Application Programming Interface (DmgAPI). The DmgAPI provides programmers access to a full range of Documanage capabilities from many popular platforms and programming environments. This API is the preferred way of accessing Documanage programmatically, from any supported client configuration. The DmgAPI creates and manages communication between a

Documange client application (containing the DmgAPI instance) and the Documange Servers and Routers.

The Workstation installer also installs and registers the ActiveX controls available to Windows developers. The Documange Software Development Kit (SDK) includes these ActiveX Controls along with separately available documentation and files supplied in directories on the distribution media. The remainder of the SDK includes:

- ◆ the Documange Programmers Guide,
- ◆ the cross-platform DmgAPI libraries,
- ◆ the HTML-based DmgAPI Help system and the
- ◆ Windows Workflow Daemon application and sample code files.

Microsoft Windows developers should start by installing the Documange Workstation and then verifying its connectivity by logging it onto its target development Documange Server.

## Installing the Application Program Interface for UNIX

Install the cross-platform DmgAPI subroutine library to develop client software that is UNIX compatible. The DmgAPI library includes:

- ◆ Documange library for Linux/AIX/Solaris: libdmg\_api.so.
- ◆ HTML-based documentation for UNIX compatible systems:  
\\DmgAPI\\DmgAPIHelp.

## Workstation and Application Program Interface

Installing the Application Program Interface for UNIX

---

- ◆ Updated installation information for each release:  
    \DmgAPI\DmgAPI\_Install.

### Prerequisite software

Verify that the following prerequisite software has been installed:

#### Linux

All current fixes are required for each kernel release. The latest Linux kernel build announcements are available at: <<http://www.spinics.net/lists/announce-kernel/>>

No additional software is required:

- ◆ Free DCE/RPC for Linux is supplied in the libdcerpc.so.0.0.1 file packaged with your installation. It incorporates modifications that allow Documanage to run with the latest versions of Linux.
- ◆ ODBC and DCE libraries are also included as a part of your installation.

#### Solaris and AIX

- ◆ IBM Distributed Computing Environment Base Services 3.2 for UNIX, Part Number 29P4459

### Dmg\_API

The dmgs\_api consists of six header file and one shared object file.

#### Header Files:

- ◆ dmgs\_api.h

## Workstation and Application Program Interface

Installing the Application Program Interface for UNIX

---

- ◆ `dmg_api_error_codes.h`
- ◆ `dmg_api_props.h`
- ◆ `dmg_api_sizes.h`
- ◆ `dmg_api_types.h`
- ◆ `dmg_api_version.h`

### Shared Object File:

- ◆ `libdmg_api.so`

## Workstation and Application Program Interface

Installing the Application Program Interface for UNIX

---

# Configuring Documanage

This chapter describes how to configure Documanage after you install it.

---

## In this chapter

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

- How do you start the Documanage Router?
- How do you configure DSNs?
- How do you add Document Categories?

---

**NOTE:** Screen captures may differ from your product in colors and/or version numbers, etc. Unless otherwise noted, configuration steps for Documanage remain the same.

---

## Configuring Documanage for first time use

Once the Documanage database has been installed, you need to start the router, log in to the Administrator module, configure DSNs (set the password for each database), add Document Categories, and start the server.

- 1 **Start the Documanage Router.**
  - ◆ Go to Start | Control Panel | Administrative Tools and click *Services*.

## Configuring Documanage

Configuring Documanage for first time use

---

- ◆ Select the Documanage Router and click *Start*.

See Appendix C, “Using the Documanage Service Controller” in the Administrator’s Guide for information on setting up and adding the Router through the Service Controller.

---

**CAUTION:** The [EZPDSInfo] section of the Documanage poffice.ini file must contain a valid table owner name and authentication ID for the database used by the Documanage router and server. If it does not, the Configure DSN command in the DocuManage Administrator generates errors. The installer uses DMANAGE as the default value of the table owner name variable—DataSource, and DMG as the default value of the authentication ID variable—AuthID. The database in your installation may require different values. For more information about the contents of [EZPDSInfo], refer to Appendix B in the Administrator's Guide.

---

### 2 Open the Documanage Administrator module and login.

### 3 Configure DSNs

- ◆ Click the *Configure DSNs* button from the Documanage Administrator main dialog.
- ◆ Select the database for which you want to enter a password and click *Configure*.
- ◆ Enter the Login ID (user name), Password, and, if necessary, the ODBC Connect the server will use to login to the database. Click *OK*.

---

**NOTE:** Setting up a password at this point allows the server to run as a service.

---

- ◆ Click *Close* after configuring all DSNs.

#### 4 Add Document Categories.

---

**CAUTION:** You must add at least one Document Category before starting the Server.

---

- ◆ Click *Categories* on the Documanage Administrator dialog. The Document Categories dialog opens.
  - ◆ Click *New Type*, enter a name for a Document Category, and click *OK*. There is a 19 character limit.
  - ◆ Go to the *Storage* tab and click *Add*.
  - ◆ Select a Volume from the *Volume* drop down list.
  - ◆ Select a Type of document from the *Type* drop down list.
- 

**NOTE:** Permanent storage refers to the physical location of the document; Temporary storage refers to the area where checked-out documents reside.

---

- ◆ Click *OK*.

#### 5 Start the Server.

- ◆ Go to the Windows Control Panel (Start|Settings|Control Panel) and double click the Services icon.
  - ◆ Select the Documanage Server and click *Start*.
- 

**NOTE:** Refer to Appendix C “Using the Documanage Service Controller” in the Administrator’s Guide for information on setting up and adding the Server through the Service Controller.

---

## Configuring Documanage

Configuring Documanage for first time use

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# Appendix A: DmgSamples

The cabinets defined by DMGSamples and a brief description of each are as follows:

- ◆ **Amergen**—Sample Insurance company showing a single level structure - file types including .XLS, .DOC, .AFP, .JPG, and .TIF.
- ◆ **Amergen w/ Document Filter**—Cabinet filtering out the Document Category “POLICY”.
- ◆ **Archive**—Cabinet used to demonstrate Documaker RP.
- ◆ **CalXPower**—Sample Utility Company showing a single level structure. File types include .DOC, .XLS, .TIF, and .PDF. A custom label concatenating three columns with a delimiter of ‘-’ has been used.
- ◆ **CalXPower w/ Variable Filter**—Cabinet with a variable filter allowing a search on LastName.
- ◆ **Claim Properties. Completed Tasks**—Completed tasks of the workflows used in the DCIG by Claim cabinet.
- ◆ **Claim Properties. Overdue Tasks**—Overdue tasks of the workflows used in the DCIG by Claim Cabinet.
- ◆ **Claim Properties. Pending Tasks**—Pending Tasks of the workflows used in the DCIG by Claim.
- ◆ **Consolidated Amergen/Loth/CalX**—This consolidated cabinet combines all of the documents from the Amergen, Lothian, and CalXPower LOB tables where the folder values are the same.

## Appendix A: DmgSamples

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- ◆ **DCIG by Claim**—Sample Insurance Company showing a multi-level structure using four tables: Claim, Customer, Policy and Vehicle. This cabinet also has a workflow demonstrating a claims process. Customized labels are also used concatenating multiple columns in a database with different data types.
- ◆ **DCIG by Policy**—Cabinet using the same LOB tables from DCIG by Claim, allowing views of different multi-level structures using the same tables.
- ◆ **Documentation**—Docucorp's Documentation for Documange and Docusave Server/NT.
- ◆ **Lothian**—Sample Financial Company showing a single level structure. File types include Tiff, AFP, xls, doc, JPG and PDF.
- ◆ **Lothian w/ Authorities**—Cabinet showing authorities placed on a table not allowing clients to manipulate documents such as importing, exporting, annotating, checking-out etc. The settings are located in the Documange Administrator Authorities dialog.
- ◆ **Lothian w/ Order By DESC**—Cabinet using the order by feature. When clients open a cabinet a certain order to the folders can be applied.
- ◆ **Printer Resources**—Cabinet for exclusive use of storing printer resources. AFP Fonts, AFP FORMDEFS, AFP Overlays, AFP Page Segments, Metacode Fonts, Metacode FRMs, and Metacode IMGs are stored in this cabinet.
- ◆ **RPEX1**—Cabinet is used to test the functionality of Docupresentment.
- ◆ **Web Search**—Cabinet used to demonstrate the features of Docupresentment.

# ***Appendix B: Windows Authentication***

How you choose to run Documanage Router and Server services impacts how they authenticate users as they log on, and where their accounts and passwords must be defined. It also affects what network-based storage services the Documanage Server can access.

When running the Documanage Router and Server on the Microsoft Windows operating system, Windows authentication is usually the preferred mode of user management.

This appendix describes how Windows authentication works and what settings are required to obtain the authentication behavior desired under Documanage. The questions to ask before you set up router and server authentication include:

- ◆ Are your Documanage users regular users within your Windows domain?
- ◆ Are you using multiple Documanage servers?
- ◆ Are your Server and Router machines part of your users' domain or any domain at all?
- ◆ How is your document storage configured?

### Terminology

To simplify the explanations the following terminology is used:

- ◆ **Server machine:** The computer on which the router/server processes are run.
- ◆ **Server domain:** The domain of which the server machine is a member.
- ◆ **Domain controller:** Either a Windows NT domain controller or Active Directory Server, whichever is appropriate for the network in question.
- ◆ **Group machine:** A machine running the Security Accounts Manager (SAM) which defines the LoginGroup. This is defined by the `Domain=` INI file entry, for which there are two choices:
  - ◆ **\\MachineName** (default) uses the SAM on the named machine. The default `MachineName` is the server machine.
  - ◆ **DomainName** uses the SAM on any available domain controller for the domain.
- ◆ **Service account:** The user account under which the router/server processes are run; it is a system account or a named account. A system account is an unnamed system identity defined by the operating system. A named account may be: (1) a local account defined on the server machine, (2) a server domain account defined on the server machine's domain, or (3) a foreign domain account defined on a domain other than the server machine's domain.
- ◆ **Login Account:** The user `domain\account` submitted by the client program to log into the server.

## Group Settings

The Router and Server Services are configured to use a particular group to define the set of users who may access the Documanage system. This group may be a local group on the server machine or a domain-level group on the servers or another trusted domain. This group is configured by two optional settings in the [PowerOfficeRouter] section of the POFFICE.INI configuration file:

Setting	Description
LoginGroup=<groupName>	groupName is the name of a group defined in the scope of the domain or machine named in the Domain= configuration key. The default group name is Users.
Domain=<domainName> \\<machineName>	Domain= defines the security context of the LoginGroup= key value. The local (server) machine name is the default. If a domainName is specified, Documanage servers will locate a domain controller for the domain and use it to determine the LoginGroup membership. If a machineName is specified, that machine is contacted and LoginGroup must be defined locally on that machine. If machineName is a domain controller or Active Directory Server, it is equivalent to specifying the domainName for that domain, but explicitly names the controller/server to be used.

### General Requirements

- ◆ Each user login account must have the user right on the server machine to "Access this computer from network."
- ◆ If run under System Account, all file system storage volumes must be local to the server machine. This does not apply to BLOB and VLAM storage.

### Server Services Configurations

The table shown here lists the combined effects of the domain key settings and the mode/authority in which the servers are run. It assumes that the server machines are members of a domain. If the server machines are configured as Workgroup machines, this table does not apply.

## Appendix B: Windows Authentication

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INI File domain=...	Local Account (Notes 1, 2, 3)	System Account	Server domain Account (Notes 1,3)	Foreign Domain Account (Notes 1,3)
not specified or set to the local machine name as in \\localmachine	Works. Users can be defined on the local machine or in any trusted domain.	Works. (Does not require note 2)	Works	Works
Server domain name as in Domain=thisdomain or domain controller machine name for that domain as in Domain=\\thiscontroller	Works. Users can be defined in any trusted domain.	Works	Works	Works
Another domain name or a domain controller machine name for another domain (other than the server's domain.)	The group domain must have a duplicate of the services account (same password) to allow access to the group list.	Works. The server machine's domain and the group domain must have a trust relationship.	Works. The server domain and the group domain must have a trust relationship.	Works
Another machine name which is not a domain controller (regardless of domain boundaries) as in Domain=\\bobsdesktop	The group machine must have a duplicate of the services account (same password) to allow access to the group list.	Unworkable. The server cannot access the group machine to determine group membership.	The services account must have access to the named machine to determine group membership.	Works

### Notes

- 1 The account (local or domain) under which the services are run must be granted the user right to "Log On As A Service" on the server machine.**
- 2 When the services are run under a local account, domain users can be included directly or via a group only if the local account also exists on the user's domain and has the same password as the local definition. This is required for the server to contact the domain to determine the user's full name. If this is missing, the server log will record an error 1326 trying to get information about the user from their domain.**
- 3 If remote (networked file system) storage volumes are configured, the account under which the services run must have access to the network shares. For a Local Account, this is true only if the Local Account also exists with the same password on the share provider (or its domain).**
- 4 To process a login of a domain account, the services account must be able to authenticate the login credentials and query the domain controller of the user for the login account full name.**

### Login Errors and their causes:

#### 2081

- 1 The login domain\user password combination could not be authenticated because it does not exist.
- 2 The login domain\user does not have the right on the server machine to "Access This Computer From Network."

#### 2088

- 1 The INI file specifies a Domain>LoginGroup name that does not exist.
- 2 The user logging in is not a member of the Domain>LoginGroup.
- 3 The user logging in is a domain user and the server is running under a local account which does not also exist (with the same password) as a domain account in the user's domain, enabling the server to reach the domain to get user information.
- 4 The user logging in is a domain user and the server is running under a