

IBM ImagePlus
VisualInfo for AS/400



Planning and Installation Guide

Version 4 Release 1

IBM ImagePlus
VisualInfo for AS/400



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Note!

Before using this information and the product it supports, be sure to read the general information under "Notices" on page iii.

First Edition (September 1997)

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About This Book

This book provides site planning and installation personnel with information on preparing for and installing IBM ImagePlus VisualInfo for AS/400 (VisualInfo for AS/400). It includes an overview of hardware and software components for the product and contains specific information for installing this version.

Who Should Use This Book

Use this book if you are responsible for planning, installing, or configuring the VisualInfo for AS/400 system for your enterprise.

If you are a *systems analyst* or *systems planner* who plans to install VisualInfo for AS/400, this book helps you understand how the product fits into your operation, evaluate your workload, estimate the system you need, and design the interfaces to your current business applications.

If you are an *administrator* or a *supervisor* responsible for document processing, this book helps you understand how to analyze your current working environment, as well as develop the organization of document movement and processing workflow used with an image processing application.

If you are an *applications programmer* who plans to install and customize VisualInfo for AS/400 on your system, this book explains the scope of the work and tells where you can get additional information. If you are designing and developing an image processing application, it describes the capabilities of the components. Information on customizing helps you understand how to tailor the components to best fit your application requirements.

Skills You Need

Before beginning installation, you should be trained to install and operate VisualInfo for AS/400. See your IBM representative for a list of VisualInfo for AS/400 training classes.

You should have experience in installing and operating the Application System/400 (AS/400) system, IBM Token-Ring Network, and IBM 3995 Optical Library Dataserver. You should also know how to install software on Windows platforms.

To design and install a custom system, you need to be familiar with the following:

- System Network Architecture (SNA) advanced program-to-program communication (APPC) or Advanced Peer-to-Peer Networking (APPN)
- System operation and network administration

See “Where to Find More Information” on page vi for books containing additional installation and configuration instructions for the Workfolder Application Facility feature, and see “Bibliography” on page 37 for books on installing related products.

How to Use This Book

If you are installing VisuallInfo for AS/400 for the first time, you should read this book in its entirety.

If you are migrating a previous version of Workfolder Application Facility to VisuallInfo for AS/400 or considering using both VisuallInfo for AS/400 and Workfolder Application Facility together, see Chapter 1, “Introducing VisuallInfo for AS/400” on page 1. You should also review the *IBM ImagePlus Workfolder Application Facility for AS/400: Planning and Installation Guide* for migration instructions, as well as this book and both system administration books for important coexistence considerations and limitations.

This book is also available in softcopy format. See “Where to Find More Information” for details.

Where to Find More Information

The following IBM documents contain information that you might find helpful when using VisuallInfo for AS/400.

For a list of other related publications, see “Bibliography” on page 37. Request copies of IBM publications from your IBM representative or from the IBM branch office serving your area.

IBM ImagePlus VisuallInfo for AS/400

When you order VisuallInfo for AS/400, you receive the following printed publications as part of the VisuallInfo for AS/400 license.

- *IBM ImagePlus VisuallInfo: Client for Windows User's Guide*, SC31-9052
- *IBM ImagePlus VisuallInfo for AS/400: Licensing Information*, GC34-4589
- *IBM ImagePlus VisuallInfo for AS/400: Planning and Installation Guide*, GC34-4585
- *IBM ImagePlus VisuallInfo for AS/400: System Administration Guide*, GC34-4583

The remaining books are shipped in softcopy format only.

- *IBM ImagePlus VisuallInfo: Messages and Codes*, SC31-9065
- *IBM ImagePlus VisuallInfo for AS/400: Application Programming Guide and Reference*, SC34-4586

IBM ImagePlus Workfolder Application Facility for AS/400

When you order the Workfolder Application Facility feature of VisuallInfo for AS/400, you also receive the following printed publications.

- *IBM ImagePlus Workfolder Application Facility for AS/400: Planning and Installation Guide*, GC34-4624
- *IBM ImagePlus Workfolder Application Facility for AS/400: System Administration Guide*, GC34-4625

The remaining books are shipped in softcopy format only.

- *IBM ImagePlus Workfolder Application Facility for AS/400: Designing a Work Process*, SC34-4588
- *IBM ImagePlus Workfolder Application Facility for AS/400: Programming Interfaces Guide*, SC34-4590
- *IBM ImagePlus Workfolder Application Facility for AS/400: User's Guide*, SC34-4584
- *IBM ImagePlus Workfolder Application Facility for AS/400: User's Guide for the Work Management Builder*, SC34-4587

About the Softcopy Document Library

In addition to the printed books you receive as part of the VisualInfo for AS/400 product, the entire document library is available in softcopy. Shipped on a separate document tape or CD-ROM, the library includes books for the Workfolder Application Facility feature. You can also purchase printed copies of any book in the library.

The library is available in the following formats:

- Portable document format (PDF)
- Hypertext markup language (HTML)

Before you can view or print PDF and HTML documents, follow the installation instructions in either the *IBM ImagePlus VisualInfo for AS/400: Planning and Installation Guide* or *IBM ImagePlus Workfolder Application Facility for AS/400: Planning and Installation Guide*.

PDF Files

Using PDF files, you can easily view documents online, as well as select one or more pages that you want to print.

To view PDF documents, you must have a Web browser and the Adobe Acrobat Reader. If you do not already have this tool, you can obtain it free by following the instructions for download from the Adobe home page:

<http://www.adobe.com/prodindex/acrobat/readstep.html>

A variety of national language readers are also available.

Using the Adobe Acrobat Reader, you can do the following:

- View documents that resemble printed pages.
- Easily navigate through PDF books as you would a hardcopy document.
- Use the text search capability by selecting **Find** from the **Tools** pull-down menu.
- Easily print a single page, a range of pages, or an entire document.
- Customize page size, graphics, fonts, and font sizes.

To view or print books from PDF files using the Adobe Acrobat Reader, follow these steps.

1. Start the Adobe Acrobat Reader.
2. Select **Open** from the **File** pull-down menu.
3. Select the location where you installed the document library.

4. Select the book you want to view.

HTML Files

Using HTML files, you can use a Web browser of your choice to view and print HTML books. These resemble printed books yet provide convenient HTML links to help you navigate through the information.

To view or print books from HTML files, follow these steps.

1. Start your Web browser.
2. Select the **Open** or **Open file** choice (usually from the **File** pull-down menu).
3. Select the location where you installed the document library.
4. Select the book you want to view.

BookManager Files

BookManager files for the VisualInfo for AS/400 document library will be available in the first half of 1998 on CD-ROM as part of the AS/400 softcopy collection kit. To view or print books using BookManager, refer to the books that accompany your softcopy collection kit.

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Chapter 1. Introducing VisuallInfo for AS/400

In this section you will learn about IBM ImagePlus VisuallInfo for AS/400 (VisuallInfo for AS/400) and how to plan for and make configuration decisions for your enterprise. This section describes VisuallInfo for AS/400 product components and how they work together to provide you with a document management solution that you can scale to meet the needs of your enterprise.

Also available as an optional feature of VisuallInfo for AS/400 is IBM ImagePlus Workfolder Application Facility for AS/400 (Workfolder Application Facility). For more information, see “Choosing an Environment for Your System” on page 5.

VisuallInfo for AS/400 is a client/server system for capturing and managing documents on the AS/400 platform. Using VisuallInfo for AS/400, your enterprise can capture, store, and manage objects on the AS/400 and can archive these to an optical data server.

In an office, documents are typically stored in file cabinets. These file cabinets typically contain folders, which contain various types of the documents. Depending on where the file cabinets reside, it could be time-consuming or difficult to retrieve and file these documents again. Using VisuallInfo for AS/400, you can electronically store documents in an *index class*, which is similar to an actual file cabinet. An index class can store documents, as well as folders. The AS/400 can now provide management for your file cabinets and indexed folders.

Planning Your VisuallInfo for AS/400 Solution

To effectively plan for your VisuallInfo for AS/400 solution, you need to analyze your current information management requirements. After gathering data about the current system and outlining requirements for your solution, you can design a VisuallInfo implementation that meets your enterprise’s specific needs.

The considerations in “Choosing an Environment for Your System” on page 5 can help you begin to plan how to implement your VisuallInfo for AS/400 solution and make critical decisions about that system. You will want to work with your IBM sales representative or business partner throughout the planning process.

Analyzing Your Current Environment

Here are some considerations you will need to determine how your enterprise manages information in the current environment.

- Average size of objects when stored electronically
- Orientation of each object (landscape or portrait)
- Number of objects currently stored on your server
- Number of objects that will be stored
- How objects and related information are currently indexed
- Information that will be useful for existing applications that is already contained in the objects

- Business processes that use this information
- Active life of an object
- How often your enterprise will need to refresh the objects
- How long your enterprise will need to retain objects once they are no longer active
- Who will use the objects
- Number of people who will need to have access to the objects
- Where these people are located
- Tasks for which these objects will be used
- Destination of the objects
- Number of locations that will need to store information about the objects
- Number of additional objects your enterprise will need to store daily
- Amount of information about the objects that will need to be updated daily
- How often the same objects or information about them will be accessed

Knowing this information in advance will help you make such decisions about your VisuallInfo for AS/400 system—such as how many servers your enterprise will need, their size, where they will be located, and the number of clients or users that will need access to these servers.

Choosing a Configuration for Your VisuallInfo for AS/400 System

Before installing a VisuallInfo for AS/400 system, you must understand and determine which VisuallInfo for AS/400 components will best meet your enterprise's needs. Table 1 describes the components that comprise the VisuallInfo for AS/400 product. You can use a combination of these to build your VisuallInfo for AS/400 system.

Component	Description
VisuallInfo for AS/400 Library Server	<ul style="list-style-type: none"> • Manages library data • Maintains index information • Controls access to objects stored in object servers
VisuallInfo for AS/400 Object Server (optional)	<ul style="list-style-type: none"> • Contains multimedia objects stored in the library • Controls storage devices
VisuallInfo for AS/400 client, including application programming interfaces (APIs)	<ul style="list-style-type: none"> • Lets users access information stored on the library and object server • Supports Visual Basic • Provides high-level APIs, which enable development of image applications on Windows 95 and Windows NT workstations or integration with applications running in those environments
Optical systems (optional)	Archives objects from the VisuallInfo for AS/400 object server

Library Server

The VisuallInfo for AS/400 library server is the AS/400 on which your library services application is installed. You can have only one library server. The *library* is a database that manages document folders and their attributes based on requested tasks. The

library server maintains indexing information and manages storage of VisuallInfo for AS/400 objects. Refer to the *IBM ImagePlus VisuallInfo for AS/400: System Administration Guide* for information about defining your library server.

Object Server

A VisuallInfo for AS/400 object server is a repository for objects stored in the system. Users store and retrieve objects in the object server through requests that the object server routes. The object server stores objects based on storage management definitions that you define through the VisuallInfo for AS/400 library server, object server, and object directory profiles.

When you install VisuallInfo for AS/400, you are installing a combination library server and object server. VisuallInfo for AS/400 supports one library server with one or more object servers. If you determine that you need the support of a second object server, you must install the VisuallInfo for AS/400 secondary processor on AS/400 system servers other than the library server. See Appendix A, "Configuring a Stand-Alone Object Server" on page 35 and refer to the *IBM ImagePlus VisuallInfo for AS/400: System Administration Guide* for information about defining an object server.

Client

You can install the VisuallInfo for AS/400 client on a Windows 95 or Windows NT workstation. The client application lets users request access to objects stored on the VisuallInfo for AS/400 object server. It can also display item information stored in the VisuallInfo for AS/400 library server.

To be able to use the VisuallInfo for AS/400 client, you must also install Client Access/400 on the client workstation. Client Access/400 is the vehicle used to actually store and retrieve objects to or from the AS/400 object server.

To be able to communicate with AS/400 servers, you must also configure a logical unit (LU) 6.2 communications link for the client that connects it with the AS/400 library server.

Optical System

An optical storage device is an optional component in your VisuallInfo for AS/400 system. You can use optical storage to replace other types of storage media so you can archive documents. You can move documents you do not currently need for processing from DASD storage to optical storage. When you need them again, they can be moved back to DASD from optical. The advantage of using optical storage is that you can store large amounts of information in less space for less cost. You can attach optical storage through a local area network (*LAN-attached*) or directly to an AS/400 server (*direct-attached*).

Chapter 2. Planning and Designing a VisuallInfo for AS/400 System

Before installing your VisuallInfo for AS/400 system, you must decide which VisuallInfo for AS/400 components to install, based on the following:

- Hardware
- Communication protocols
- Licensing considerations (compliance monitoring)
- Environment
- System design

For example, you might decide to use more than one VisuallInfo for AS/400 object server because your documents require a large amount of storage. You might decide that you want to archive your documents from your object server to an optical system. You might have clients on Windows NT and other clients on Windows 95.

Planning for Hardware Components

You can define one AS/400 to perform both library and object server functions. Consider the following as you choose a library server, object server, or both.

AS/400 space

Space for the program files and your documents for the near future. The number of documents and space required can help you determine whether you might need a second object server. If more than one of your offsite locations stores and retrieves documents, you might also want to consider having an object server at each site.

Type of AS/400

Systems with more memory and processing power are better able to multitask or run several VisuallInfo for AS/400 processes, such as background and interactive processes executing concurrently.

Optical system

You can attach an optical system to the AS/400 as either a direct-attached or LAN-attached optical system. You can attach the optical system directly to the AS/400 library or object server. VisuallInfo for AS/400 supports optical devices that offer erasable and write once, read many (WORM) optical technology, as well as multifunction optical devices. Multifunction devices support both erasable and WORM disks in the same library. VisuallInfo for AS/400 supports erasable volumes as WORM.

Consider the following when planning for an optical system:

Availability of space on your AS/400

If space is limited, you might want to consider archiving documents to optical and removing them from DASD—in this case, the object server.

Document retention time

If you access documents infrequently but need to maintain them for a long period of time, you might want to archive them to optical and remove them from DASD.

Potential backup and recovery media

If you store documents to optical while working with them on DASD, you can recover them from optical in the event of system failure.

Workstation client

The number of workstations is based on the number of concurrent users.

Refer to the *IBM ImagePlus VisuallInfo for AS/400: System Administration Guide* for more information about storage management and optical storage.

Planning Communications for Your System

Your VisuallInfo for AS/400 system uses SNA communications for the physical connection between your workstations and AS/400 servers. VisuallInfo for AS/400 also requires use of a communications product that implements CPI-C, which lets you assign AS/400 drives to the workstation. It is recommended that you use Client Access/400 with a NetSoft Router (NS/Router) configured for APPC communications.

See “Configuring VisuallInfo for AS/400 Communications” on page 29 for more information.

Gathering the Needed Communication Information

You need to know the following information for each of the servers and clients in your configuration:

- Unique, fully qualified name of your network
- Transaction program name for your library server

Choosing an Environment for Your System

Both VisuallInfo for AS/400 and Workfolder Application Facility share the same document management system. While there is some compatibility between the two interfaces, differences and limitations do exist. As you design your system, you must determine which of the following environments will best suit your enterprise’s needs:

- Only VisuallInfo for AS/400
- Only Workfolder Application Facility
- Both VisuallInfo for AS/400 and Workfolder Application Facility

To more easily manage your system, it is recommended that you use either one or the other exclusively. If you determine you want to use both, you must first understand how the two coexist. For coexistence considerations and limitations, refer to the *IBM ImagePlus VisuallInfo for AS/400: System Administration Guide* and *IBM ImagePlus Workfolder Application Facility for AS/400: System Administration Guide*.

“About VisuallInfo for AS/400” on page 6 and “About Workfolder Application Facility” on page 6 describe each environment and its advantages in more detail to help you further evaluate and decide on the specific environment your enterprise will want to use.

About VisuallInfo for AS/400

VisuallInfo for AS/400 is a client/server application. Its workstation client drives all of its functions, and the AS/400 library server manages all processing. VisuallInfo for AS/400 ships with a client and its common application programming interfaces (CAPIs) that let you design your own customized client.

VisuallInfo for AS/400 offers a complete object management system through its client/server architecture. The VisuallInfo for AS/400 client provides a graphical user interface (GUI) that lets you bring documents into the system view so you can work with, store, and retrieve them.

With the Windows NT and 95 client, the basic flow of documents and information is simple. To store a document in the system, you can import it from a directory or capture it by scanning its pages. You can then index the document with information that later helps you identify and retrieve it. At that point, you can electronically route it to other users, who can do the following:

- Organize documents into electronic folders
- Retrieve groups of related documents and folders
- Send a document or folder to other users for additional processing, using ad-hoc routing
- Add a note to a document or folder
- Modify a document
- Print a document on the workstation

If your enterprise does not already use Workfolder Application Facility and the above functions satisfy your enterprise's requirements, you can install only VisuallInfo for AS/400 without installing the Workfolder Application Facility feature.

If your enterprise is already using Workfolder Application Facility and the above functions satisfy your enterprise's requirements, you can migrate to VisuallInfo for AS/400 without installing the Workfolder Application Facility feature. Refer to the *IBM ImagePlus Workfolder Application Facility for AS/400: Planning and Installation Guide* for migration instructions.

About Workfolder Application Facility

Because Workfolder Application Facility is a separately orderable feature of VisuallInfo for AS/400, you must install VisuallInfo for AS/400 on your system before you can install the Workfolder Application Facility feature.

As the host server, Workfolder Application Facility behaves a bit differently from the VisuallInfo for AS/400 client/server application. Its client is the separately orderable IBM ImagePlus Workstation Program, which you start from Workfolder Application Facility. Functions on the server drive the client. Refer to the *IBM ImagePlus Workfolder Application Facility for AS/400: Planning and Installation Guide* for details on the ImagePlus Workstation Program client.

Workfolder Application Facility offers an object management system, which is driven by the AS/400 server. From AS/400 server menus and panels, the user can import or

capture a document by scanning its pages—using fax, simple scan, or high-speed scan through Workfolder Application Facility. Refer to the ImagePlus Workstation Program books to learn more about the different types of scanning.

You can then electronically route the document to other users. In addition to the functions described in “About VisuallInfo for AS/400” on page 6, other users can then do the following:

- Print from host
- Fax from host
- Work with form overlays
- Take advantage of such automated work management capabilities as collection points, decision points, and routing

In short, Workfolder Application Facility offers advanced scanning capabilities, work management from the server, forms handling, host faxing, and host printing.

If your enterprise must have the above-described functions, you will need to install VisuallInfo for AS/400, the Workfolder Application Facility feature, and ImagePlus Workstation Program.

Combined Environment

If you plan to work in a combined environment—using VisuallInfo for AS/400 and Workfolder Application Facility together—it is essential that you review and become familiar with some very important coexistence considerations and limitations. If a combined environment suits your enterprise’s needs, it is recommended that you use Workfolder Application Facility for all input processing, such as scanning and importing, and use VisuallInfo for AS/400 for all document management, such as indexing, searching, and displaying.

Table 2 lists terms in VisuallInfo for AS/400 and Workfolder Application Facility that have the same meaning.

<i>Table 2. VisuallInfo for AS/400 and Workfolder Application Facility Terms</i>	
VisuallInfo for AS/400	Workfolder Application Facility
Index class	File cabinet
Folder item	Case
Document item	Document
Library server	Primary server
Object server	Secondary server
Collection	Document type

Coexistence Between VisuallInfo for AS/400 and Workfolder Application Facility

IBM ImagePlus VisuallInfo for AS/400 (VisuallInfo for AS/400) and its ImagePlus Workfolder Application Facility for AS/400 (Workfolder Application Facility) feature provide different interfaces to the same document management system. If you plan to use both interfaces as a single image solution to access the same VisuallInfo for AS/400 system, you need to be aware of some of the considerations, conceptual differences, and limitations between the two interfaces before beginning to use them together. In addition to information in “Choosing an Environment for Your System” on page 5, you should review specific coexistence topics in the *IBM ImagePlus VisuallInfo for AS/400: System Administration Guide*.

Planning for Compliance Monitoring

VisuallInfo for AS/400 implements a user-based pricing structure, where license entitlement is based on the number of concurrent users authorized to access the product. A *concurrent user* is defined as any user, program, or job accessing VisuallInfo for AS/400 or Workfolder Application Facility programs or databases. The following are examples:

- If a single job processes requests for multiple users, each user is considered to be a concurrent user.
- If a single user ID is logged on to multiple VisuallInfo for AS/400 sessions, each session is considered to be a concurrent user.

VisuallInfo for AS/400 provides a facility for monitoring compliance with license entitlement, and compliance is enforced independently on each processor.

System Task Considerations

You will also need to consider and plan for the following when designing your VisuallInfo for AS/400 system:

- Security
- Backup and recovery
- Storage management
- Organizing and defining your database

Defining Security Levels

Based on security levels that you define within the VisuallInfo for AS/400 environment, you can enable access to the following:

- VisuallInfo for AS/400 itself
- Documents
- Functions

Access to VisuallInfo for AS/400

When you install it, VisuallInfo for AS/400 creates a default system administrator user ID and default group profile, both of which have *ALL authority to the objects in each VisuallInfo for AS/400 library. The installation program installs all VisuallInfo for AS/400

libraries with *PUBLIC *USE access and *PUBLIC *EXCLUDE on a subset of program objects in the program library. Objects with *PUBLIC *EXCLUDE are functions having commands that no one outside VisuallInfo for AS/400 should execute.

You can assign each user working in the VisuallInfo for AS/400 environment to the group profile. If you have your own security access procedure, be sure that your users have *ALL authority to VisuallInfo for AS/400 objects. See Chapter 3, “Installing and Customizing VisuallInfo for AS/400” on page 12 for more details about user IDs that the installation program creates.

Access to Documents

When you install VisuallInfo for AS/400, the installation program creates a router user ID and associates it with the group profile. Users can sign on to the router with this user ID so that the same user ID owns all objects in the object directories. However, if you plan to maintain a large number of objects on DASD, you might want to consider using more than one router ID to avoid reaching AS/400 ownership limits.

If you create your object directories using the VisuallInfo for AS/400 object directory profile, the user who creates the profile becomes the owner of the object directory and the group profile entered on the panel will have *ALL authority to the object directory.

See Chapter 3, “Installing and Customizing VisuallInfo for AS/400” on page 12 for more information about the router ID that the installation program creates and to the *IBM ImagePlus VisuallInfo for AS/400: System Administration Guide* for details on creating object directories.

Access to Functions

Each VisuallInfo for AS/400 user must have a VisuallInfo for AS/400 user profile. Each user profile is assigned a privilege set. A *user privilege set* defines the functions that a user is allowed to perform. Through the privilege set profile, the system administrator defines the functions that each user is allowed to perform. Refer to the *IBM ImagePlus VisuallInfo for AS/400: System Administration Guide* for details on creating user profiles and assigning privilege sets.

Backup and Recovery

When planning your backup and recovery strategy, you need to consider the following parts, which are integral to your VisuallInfo for AS/400 system:

- Documents
- VisuallInfo for AS/400 files that manage document processing
- Any custom objects you support

As you plan your recovery strategy, consider that backups of these objects must remain synchronized to ensure that you can successfully recover your system in the event of failure. For detailed information on AS/400 backup and recovery, refer to the *IBM AS/400 Programming: Backup and Recovery Guide*.

Storage Management

VisuallInfo for AS/400 provides distributed storage capabilities using AS/400 object servers to help you manage your DASD storage space. Using VisuallInfo for AS/400 profiles, you can specify the object server on which a document is to be stored when it is entered into the system.

You can store documents on the following media:

- Combined library and object server
- One or more stand-alone object servers
- Optical system

Refer to the *IBM ImagePlus VisuallInfo for AS/400: System Administration Guide* for more information about storage management systems.

Organizing and Defining Your Database

Once you have installed VisuallInfo for AS/400, you must define your environment by defining the profiles that comprise your VisuallInfo for AS/400 environment. Refer to the *IBM ImagePlus VisuallInfo for AS/400: System Administration Guide* for more detail about the profiles that define your environment:

- User profiles
- Privilege sets
- Key fields
- Index classes
- Workbaskets
- Collections
- Servers
- Object directories
- Storage classes
- Optical systems

Designing Your System

To design your VisuallInfo for AS/400 system, create a map of what you plan to use—servers, workstations, and optical systems—and define how to connect them with communication links.

Follow these steps to design your system:

1. Determine the number of locations in your enterprise that will need to use your system.
2. Determine the number, type, and locations of library servers in your system. Work closely with your IBM representative to determine the following:
 - Size of your library servers
 - Number of object servers you need
 - Size of the optical system, if you decide to use one

Consider also the following:

- Capacity
 - Frequency of access
 - Response requirements
 - Client locations
3. Determine the number, type and locations of each workstation in your system. Determine the number of clients based on business needs, such as the number of users who need simultaneous access to your system at any given time.
 4. Define a device for each workstation on the AS/400 server. You can do this by setting the AUTOCONFIG parameter on your AS/400 so that the device is automatically configured the first time the user logs on to the AS/400. For your records, record the device name for each workstation.

Chapter 3. Installing and Customizing VisualInfo for AS/400

This section explains what you need to do before beginning installation, details the hardware and software requirements, and provides step-by-step instructions for installing and customizing VisualInfo for AS/400.

Before You Begin

Review this chapter and complete the following tasks before you begin installation:

- Install at least the required version of the AS/400 operating system and have applied the latest PTFs. (See “Hardware and Software Prerequisites” on page 13.)
- Determine whether you need to install additional object server (secondary) processors. The product can run on one or more AS/400 processors.
- Read and understand the information in “Coexistence Between VisualInfo for AS/400 and Workfolder Application Facility” on page 8 and Appendix A, “Configuring a Stand-Alone Object Server” on page 35 if you plan to use both VisualInfo for AS/400 and the Workfolder Application Facility feature together or run the product on a secondary processor.
- Determine which one of the following environments you plan to install, as described in “Choosing an Environment for Your System” on page 5. Your choice determines which book you should use for installation, as shown in Table 3. The installation and migration instructions in the *IBM ImagePlus Workfolder Application Facility for AS/400: Planning and Installation Guide* contain additional steps that are unique for Workfolder Application Facility.

Environment You Want to Use	Conditions	Instructions
Only VisualInfo for AS/400	You do not already have a previous version of Workfolder Application Facility installed and do not plan to install this version of it.	This is considered a new installation. Use the <i>IBM ImagePlus VisualInfo for AS/400: Planning and Installation Guide</i> .
	You already have a previous version of Workfolder Application Facility installed but do not plan to install this version of it.	You are <i>migrating</i> to VisualInfo for AS/400. See “How to Use This Book” on page vi before proceeding and then follow the migration instructions in the <i>IBM ImagePlus Workfolder Application Facility for AS/400: Planning and Installation Guide</i> .

Environment You Want to Use	Conditions	Instructions
Workfolder Application Facility, or combined environment	You do not already have a previous version of Workfolder Application Facility installed but plan to install and use this version of it.	See "How to Use This Book" on page vi before proceeding and then follow the installation instructions in the <i>IBM ImagePlus Workfolder Application Facility for AS/400: Planning and Installation Guide</i> .
	You already have a previous version of Workfolder Application Facility installed and plan to use this version of it.	You must first <i>migrate</i> to VisualInfo for AS/400 and then install the new version of Workfolder Application Facility. See "How to Use This Book" on page vi before proceeding and then follow the migration instructions in the <i>IBM ImagePlus Workfolder Application Facility for AS/400: Planning and Installation Guide</i> .

From this point forward, instructions in this book apply if you are installing only VisualInfo for AS/400 and do not already have a previous version of Workfolder Application Facility for AS/400. If you plan to install any other environment, use the instructions in the *IBM ImagePlus Workfolder Application Facility for AS/400: Planning and Installation Guide* instead.

Hardware and Software Prerequisites

The information in this section describes the required and optional hardware and software you need to install and run VisualInfo for AS/400.

VisualInfo for AS/400 Client

Hardware	Minimum	Recommended
CPU	80486DX 20MHz	Pentium 60MHz
RAM	16MB	32MB
Disk space	160MB	512MB
LAN adapter	Yes	Yes
Display adapter	Yes	Yes
Mouse	Yes	Yes

Peripherals	Minimum
Graphic displays	<ul style="list-style-type: none"> Windows-supported displays (SVGA, VGA) Cornerstone ImageAccel or ImageAccel2
Printers	Windows-supported APA printers
Scanners	Scanners that VisuallInfo for AS/400 supports

Software	Minimum
Operating system	Windows NT V4.0 or Windows 95
Communications	<ul style="list-style-type: none"> APPC implementing CPI-C Level 1.2 AS/400 network drive support Client Access/400 can provide these communication requirements.
Client	VisuallInfo for AS/400 Client for Windows

VisuallInfo for AS/400 Server

Hardware	Minimum
CPU	AS/400 9402-200
Processor	2090

Software	Minimum
Operating system	OS/400 V3R1 or higher and Client Access/400
Optical (optional)	<ul style="list-style-type: none"> Direct-attached 3995: IBM Optical Library Dataserver Support/400 for OS/400 V3R6 or lower LAN-attached 3995: None

Installation Media

Be sure you have all the needed installation tapes. Table 9 on page 15 shows which tapes you need based on what you plan to install. Tapes are listed in the order in which they are processed during installation.

If you ordered VisuallInfo for AS/400 on CD-ROM, you receive two CD-ROMs: one with the product software and another with the product document library. Although the instructions in this section are based on tape installation, CD-ROM installation varies only slightly. For example, the installation program does not prompt you to load or unload tapes. Be sure to follow these instructions closely for some media-specific differences.

To install this environment	You need these tapes
VisuallInfo for AS/400 on a library server (primary processor)	<ul style="list-style-type: none"> • IAMTAP • PRM124 • PRIMP1 • DOCTAP
VisuallInfo for AS/400 on an object server (secondary processor)	<ul style="list-style-type: none"> • IAMTAP • SEC124 • SECDP1 • DOCTAP

- IAMTAP** Starts the installation program
- PRM124** MRI (machine-readable information) tape for VisuallInfo for AS/400
- SEC124** MRI tape for VisuallInfo for AS/400 secondary processor
- PRIMP1** Program (PGM) tape for VisuallInfo for AS/400 server primary application
- SECDP1** Program tape for VisuallInfo for AS/400 server secondary application
- DOCTAP** Document tape that contains the entire softcopy product document library

If you have completed all prerequisite steps and have the installation tapes you need, you are ready to install and customize the VisuallInfo for AS/400 product.

Installing the Product

Be sure you have first read “System Task Considerations” on page 8, Chapter 1, “Introducing VisuallInfo for AS/400” on page 1, and Chapter 2, “Planning and Designing a VisuallInfo for AS/400 System” on page 4 before starting installation.

1. Sign on to the AS/400 system as QSECOFR. You see the AS/400 main menu. If the AS/400 is being used for other applications during installation, you might also receive messages from these applications.
2. Set QALWOBJRST to ALWPGMADP. You must restore this to its original value after installation, so be sure to record that value now on your installation checklist.
3. Load the media (tape, cartridge, or CD-ROM) that contains the software.

If you have tape, mount the VisuallInfo for AS/400 installation tape, IAMTAP, on the AS/400 system and follow standard loading procedures presented in the *AS/400 System Operations: Operator's Guide*.

4. Based on your media, type the following on an AS/400 command line and press Enter.

Tape: LODRUN

CD-ROM: LODRUN OPT01 DIR(/)

If your tape device is not the default (TAP01), type LODRUN *tape device* (where *tape device* is the name of your tape device) and press Enter.

The installation program restores the required objects, and you see the Display Program Messages panel shown in Figure 1 on page 16.

```

                DISPLAY PROGRAM MESSAGES

JOB nnnnnn/QSECOFR/DSP01 STARTED ON mm/dd/yy AT hh:mm:ss IN SUBSYSTEM QCTL I
LOAD TAPE FOR LANGUAGE FEATURE (C G).

TYPE REPLY, PRESS ENTER.
REPLY . . . _____

F3=Exit   F12=Cancel

```

Figure 1. Display Program Messages panel

5. If you have tape, load the appropriate MRI tape when prompted for your language feature. The MRI tape for the primary processor is PRM1xx, where xx is the last 2 digits of your language feature code. For the secondary processor, the MRI tape is SEC1xx.
6. Type **G** and press Enter to continue installation. You see the IBM logo panel shown in Figure 2.

```

===== (R)
=====
      ===  ===  ===  =====
      ===  =====
      ===  =====
      ===  =====
=====
=====

(R) IBM is a Registered Trademark of International Business Machines Corp.

      IBM VisualInfo for AS/400
      Version 4 Release 1 Modification 0

      Licensed Materials - Property of IBM
      5733-A18 (C) Copyright IBM Corp. 1990, 1997
      All Rights Reserved.
      US Government Users Restricted Rights
      - Use, duplication or disclosure restricted
      by GSA ADP Schedule Contract with IBM Corp.

      Press Enter to continue.

```

Figure 2. IBM logo panel

7. Press Enter. You see the VisualInfo for AS/400 Installation and Migration menu shown in Figure 3 on page 17.

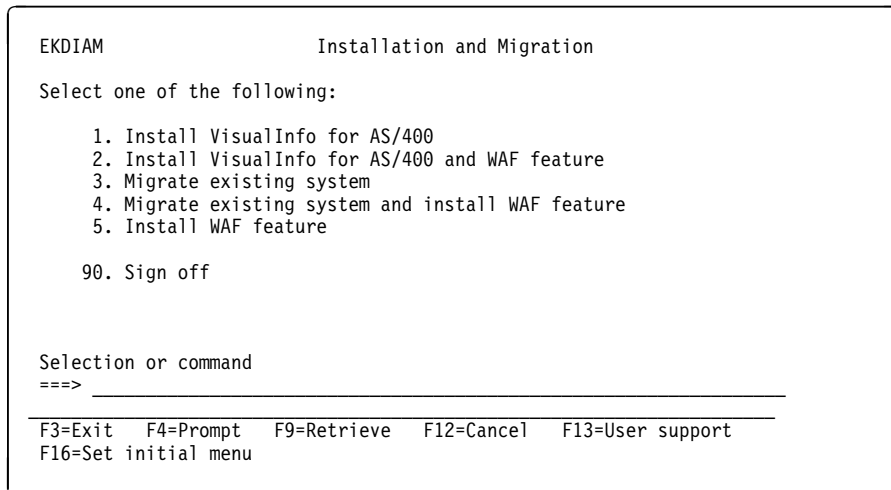


Figure 3. Installation and Migration menu

8. Select one of the following:

Install VisualInfo for AS/400

To install the needed components for the VisualInfo for AS/400 server application

Install VisualInfo for AS/400 and WAF feature

To install the needed components for the VisualInfo for AS/400 server application and the Workfolder Application Facility feature

Migrate the existing system

To migrate an existing system to the VisualInfo for AS/400 server application

Migrate the existing system and install WAF feature

To migrate an existing system to the VisualInfo for AS/400 server application and install the Workfolder Application Facility feature

Install WAF feature

To install the Workfolder Application Facility feature over VisualInfo for AS/400, which requires that you first install VisualInfo for AS/400

Your selection determines which panel you see next.

This book covers only option 1. For other options, as described in Table 3 on page 12, refer to the *IBM ImagePlus Workfolder Application Facility for AS/400: Planning and Installation Guide*.

- If you select option 1 to install on a primary processor, you see the Installation Parameter Panel for Primary Machine shown in Figure 4 on page 18.

```

EKDIAM01          VisualInfo for AS/400
                  Installation Parameter Panel
                  For Primary Machine

Type information, press Enter.
File library name . . . . . EKDLIBFIL
Panel library name. . . . . EKDLIBTXT
GPL library name. . . . . EKDGPL
Program library name. . . . . EKDLIB

Tape device . . . . . TAP01

F1=Help          F3=Exit          12=Cancel

```

Figure 4. Installation Parameter Panel for Primary Machine

- If you select option 1 to install on a secondary processor, you see the Installation Parameter Panel for Secondary Machine shown in Figure 5.

```

EKDIAM01          VisualInfo for AS/400
                  Installation Parameter Panel
                  For Secondary Machine

Type information, press Enter.
File library name . . . . . EKDLIBFIL
Panel library name. . . . . EKDLIBTXT
GPL library name. . . . . EKDGPL
Program library name. . . . . EKDLIB

Tape device . . . . . TAP01

Primary remote location . . . . . _____
Primary file library. . . . . _____

F1=Help          F3=Exit          12=Cancel

```

Figure 5. Installation Parameter Panel for Secondary Machine

9. Verify the File library name. If you receive an error, type the 1- to 10-character name of the file library in the **File library** field. The suggested name is EKDLIBFIL. This library contains the objects and source code for files used in VisualInfo for AS/400. This parameter is required.
10. Verify the Panel library name. If you receive an error, enter the 1- to 10-character name of the panel library in the **Panel library** field. The suggested name is EKDLIBTXT. This library contains the objects and source code for the panels, help panels, and menus used in VisualInfo for AS/400.

11. Verify the GPL library name. If you receive an error, type the 1- to 10-character name of the GPL library in the **GPL library** field. The suggested name is EKDGPL. This library is the general purpose library for VisuallInfo for AS/400. This parameter is required.
12. Verify the Program library name. If you receive an error, enter the 1- to 10-character name of the program library in the **Program library** field. The suggested name is EKDLIB. This library contains the program objects for VisuallInfo for AS/400. This parameter is required.
13. If you have tape, the Device parameter defaults to TAP01. Verify that the device name is correct. If not, in the **Tape device** field, enter the 1- to 10-character name of the tape device where the VisuallInfo for AS/400 tape is loaded. If you are installing a primary processor, proceed to 16.
14. If you are installing on a secondary processor, type the 1- to 10-character **Primary remote location** field on the Installation Parameter Panel for Secondary Machine. You must use the name that is defined to the token-ring network for the primary AS/400 system. The correct entry is required because the entry cannot be verified if the primary system is not actively attached to the secondary machine. To determine the primary remote location name, follow these steps:
 - a. Sign on to your primary AS/400 processor.
 - b. Type DSPNETA on the AS/400 command line and press Enter. The **Current System Name** field contains the primary remote location name.
 - c. Log off the primary AS/400 processor and continue with the secondary installation.
15. If you are installing on a secondary processor, type the 1- to 10-character **Primary file library** field on the Installation Parameter Panel for Secondary Machine. This is the VisuallInfo for AS/400 file library on the primary machine. Be sure this value is correct, or full validation might not be possible. This field is required.
16. For future reference, you should record each library you selected on your installation log sheet for VisuallInfo for AS/400.
17. Press Enter to start installation.

If you are installing on a secondary processor and the installation program cannot connect to the primary processor, you receive a warning message that the entries cannot be verified before installation continues.

You see the System Prefix Selection Panel shown in Figure 6 on page 20 if the QVIADMIN user ID already exists on your AS/400 system.

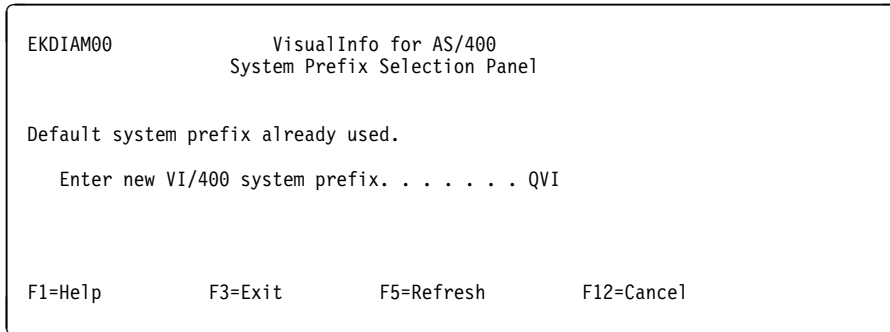


Figure 6. System Prefix Selection Panel

When you see this panel, enter the new system prefix you want to use. This 1- to 3-character prefix must be unique: It cannot be QVI or any prefix you created previously on the system.

Installation has begun when you see the Informational Message Panel shown in Figure 7. Additional messages appear occasionally to indicate how installation is progressing.

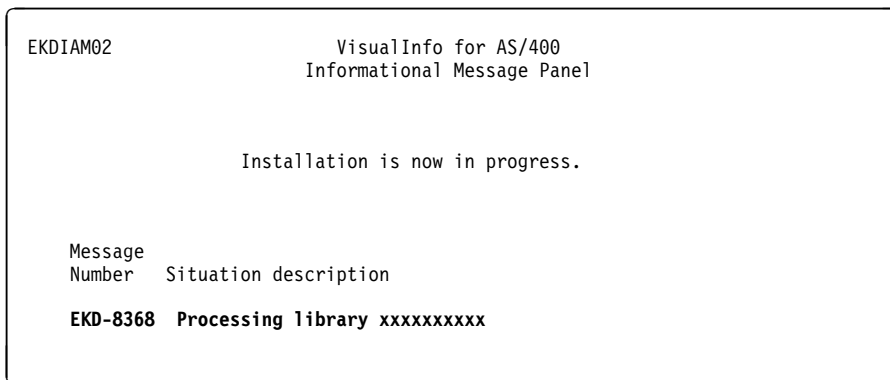


Figure 7. Information Message Panel

If you have tape, when the MRI tape has completed, the installation program prompts you to insert the program (PGM) tape, as shown in Figure 8 on page 21.

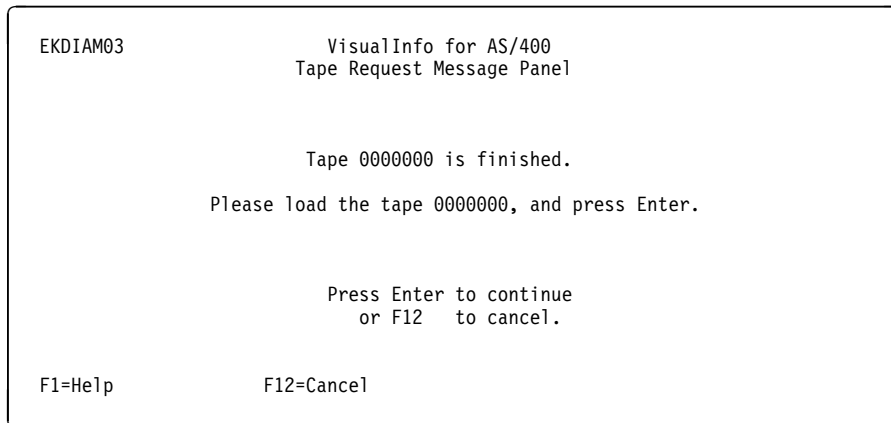


Figure 8. Tape Request Message Panel

This panel appears each time a new tape is needed to continue installation. When you see it, follow these steps:

1. Unload the current tape from the tape drive.
2. Load the next tape into the tape drive. You must load tapes in the order specified in Table 9 on page 15.

When VisualInfo for AS/400 has been installed, the **EKD-8303 System restored. Now initializing system** message appears on the Informational Message Panel. The installation program begins creating default user profiles and assigns authorities to them.

When installation has completed successfully, you see the Compliance Monitor Configuration panel shown in Figure 9 on page 22.

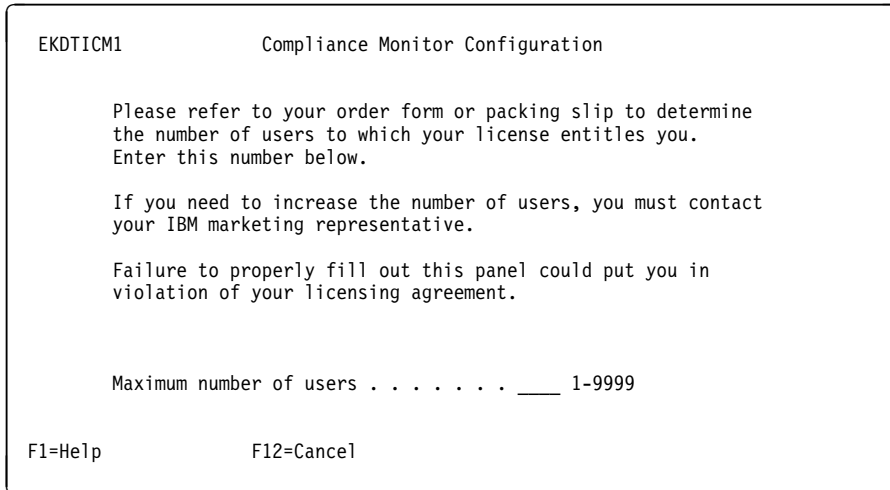


Figure 9. Compliance Monitor Configuration Panel

When you see this panel, enter the maximum number of concurrent users allowed on your VisualInfo for AS/400 by your license agreement and press Enter. You see the Successful Completion Panel shown in Figure 10.

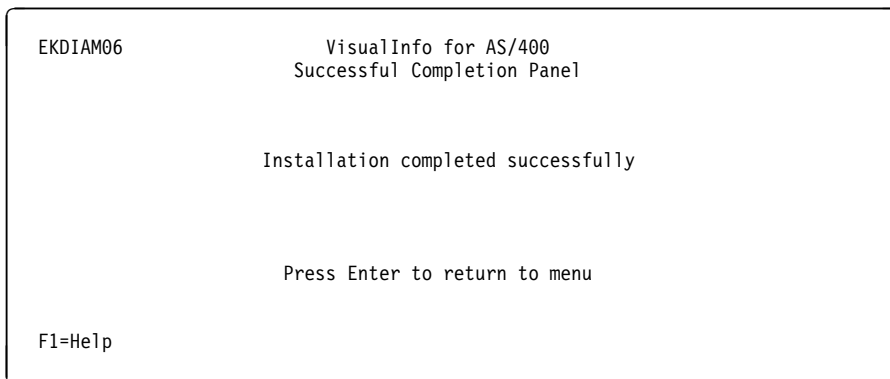


Figure 10. Successful Completion Panel (EKDIAM06)

When you see this panel, unload the tape from the tape drive.

During installation, the installation program creates the following set of profiles:

- System administrator (xxxADMIN)
- Client Access/400 router user ID (xxxROUTE)
- Group (xxxGROUP)
- Output queue (xxxOUTQ)
- Job description (xxxJOB)

In these profile names, xxx represents a 3-character system prefix. The first prefix is QVI in VisualInfo for AS/400. Other than this, the prefix you assigned is used.

The password for the default system administrator is *NONE. QSECOFR must assign a password before the system administrator can sign on. Authority for the default system administrator and group profile is set to *ALL for all product objects and libraries.

Correcting Installation Errors

During the installation process, the installation program checks for certain conditions in the libraries that have been specified for installation. If it encounters an error that requires that the installation process be cancelled, the Problem Determination Panel shown in Figure 11 is displayed. You can display additional Help information by pressing F1.

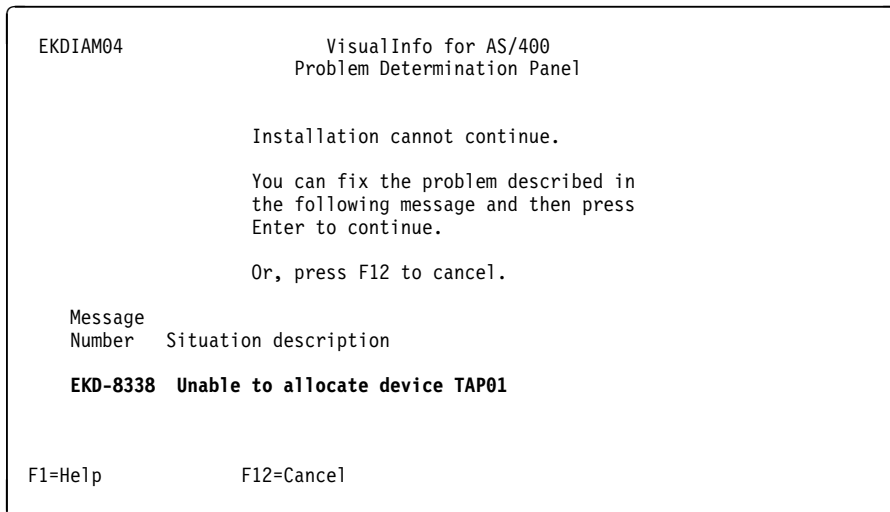


Figure 11. Problem Determination Panel (EKDIAM04)

When you see this panel, you can display the job log by pressing first F1 and then F10. Correct the problem and press Enter to continue installation. If you cannot correct the problem or decide not to continue installation, press F12 to cancel installation. You see the Cancellation Confirm Panel shown in Figure 12 on page 24 any time you cancel installation.

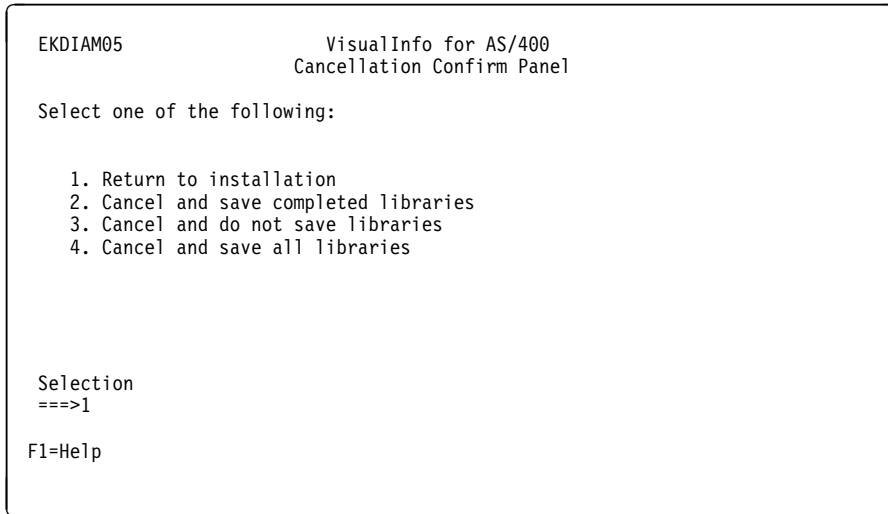


Figure 12. Cancellation Confirm Panel (EKDIAM05)

Selection options are arranged in order, from the one with the least possible consequences to the one with the most, with the following results:

Return to installation

You return to the panel prior to when you pressed F12.

Cancel and save completed libraries

The installation program deletes the library that was in error. All other libraries remain and are unchanged, and installation ends. You can open the job log to determine which libraries were restored.

Cancel and do not save libraries

The installation program deletes all new library names, if found, that you entered on the Installation Parameter Panel (EKDIAM01). Shared libraries remain and are unchanged. It also deletes the default profiles, and installation ends.

Cancel and save all libraries

Installation ends immediately, and all libraries remain and are unchanged. You might need to manually delete any libraries found to be in error.

Restarting Installation

Once installation has completed, here is how you can access the installation menu again.

1. Be sure that the library `EKDIAMcode`—where `code` is the language feature code you installed—is in your library list by following these steps:
 - a. Type **DSPLIBL** on an AS/400 command line and press Enter. You see the Display Library List panel. If library `EKDIAMcode` is in your library list, press F3 to exit and proceed to 2 on page 25. If not, press F3 to exit and continue.

- b. Type **ADDLIBLE EKDIAM***code* and press Enter.
2. On the AS/400 command line, type **G0 EKDIAM**.

Customizing on a Library or Object Server

For information on customizing VisuallInfo for AS/400 on an object server, see Appendix A, “Configuring a Stand-Alone Object Server” on page 35. If you do not plan to customize VisuallInfo for AS/400 at this point, proceed to “Assigning Authorities” on page 27.

About AS/400 User Profiles and VisuallInfo for AS/400

All users accessing VisuallInfo for AS/400 must have authority to VisuallInfo for AS/400 libraries. The installation program created the following items. Default names apply if this is your first installation.

- A default group profile at the start of installation (QVIGROUP)
- A default job description (QVIJOB)
- A default system administrator user ID with the authorities needed to perform VisuallInfo for AS/400 administrative tasks (QVIADMIN)

If you were prompted for a 3-character prefix at the beginning of installation, the default profile and system administrator would be *xxx*GROUP, *xxx*ADMIN, and *xxx*JOB—where *xxx* represents the 3-character prefix you entered. These profiles were created in the EKDGPL library.

VisuallInfo for AS/400 can create objects on the AS/400 such as data queues, data areas, folders, or files. The installation program creates the user ID QVIOWNER during installation. This user ID owns VisuallInfo for AS/400 objects installed on the AS/400, as well as those that VisuallInfo for AS/400 creates interactively. Because it has minimal authorities, your application should not use it.

Passwords for user IDs that the installation program creates are set to *NONE. While signed on the system with QSECOFR authority, you must assign a password to the default system administrator user ID so that you can use it to define your VisuallInfo for AS/400 profiles. Because QSECOFR is not defined to the VisuallInfo for AS/400 as an authorized user, you must use the default system administrator user ID to set up your initial profiles.

You must create all user profiles that will be used to perform VisuallInfo for AS/400 functions with the characteristics provided in Table 10.

<i>Table 10 (Page 1 of 2). Characteristics Needed for VisuallInfo for AS/400 Users</i>		
Parameters	Characteristic	Value
User class	Users	*USER (minimum)
	System administrator	*SYSOPR (minimum)

Table 10 (Page 2 of 2). Characteristics Needed for VisuallInfo for AS/400 Users

Parameters	Characteristic	Value
Special authority	Users	*JOBCTL
	System administrator	*JOBCTL *SAVSYS *SECADM *SPLCTL
Initial program to call		EKDLOGNP
	Library	EKDLIB
Job description	Defines the user's VisuallInfo for AS/400 library list as follows. These are the default library names. Use the names as you defined them when installation started.	
	File library	EKDLIBFIL
	Panel library	EKDLIBTXT
	Program library	EKDLIB
	General-purpose library	EKDGPL
	General-purpose system library	QGPL QTEMP QOPTICAL (optional) QSYS2 (optional) If you have optical, see Chapter 5, "Planning for Optical Storage" on page 32.
Initial menu	Optional field; necessary only for the system administrator. If you want your initial menu to be a VisuallInfo for AS/400 so you can perform administrative functions menu when you sign on to the AS/400, here is what it should be:	
	Menu	VI
	Library	EKDLIBTXT (panel library)
System directory	All users working with VisuallInfo for AS/400 must have an entry in the AS/400 system directory. Use the ADDDIRE command to add users to this directory. Refer to the AS/400 system manuals for instructions on using this command.	

Completing Installation

Once you perform the following activities, installation is complete:

- Assign authorities
- Configure background processing
- Start and use the product
- Create profiles
- Restore the softcopy product document library

When you complete these steps, be sure to reset QALWOBJRST on your AS/400 system to the value you had originally set it to before beginning installation.

Assigning Authorities

Assigning authorities involves an AS/400 GRTOBJAUT (Grant Object Authority) command. For every library installed, type the following commands for each user profile or group profile not previously defined in VisuallInfo for AS/400, where **library** is the name of the library installed and **profile** is the name of the group profile or user profile.

```
GRTOBJAUT OBJ(library/*ALL) OBJTYPE(*ALL) USER(profile) AUT(*ALL)
GRTOBJAUT OBJ(QSYS/library) OBJTYPE(*LIB) USER(profile) AUT(*ALL)
GRTOBJAUT OBJ(QGPL/EKD*) OBJTYPE(*ALL) USER(profile) AUT(*ALL)
```

Configuring Background Processing

VisuallInfo for AS/400 uses the job queue QBATCH in subsystem QBATCH to submit all requests to be run in batch mode. Some of these requests require more than one job to be executed concurrently.

To run these processes successfully, the maximum number of jobs in subsystem QBATCH must be greater than 1 and the number of active jobs in job queue QBATCH must also be greater than 1.

As a general recommendation for setting the maximum jobs in the subsystem and the job queue, use the following formula: $n = \text{number of system service processes to be used,} + \text{the number of interactive retrieve jobs to be run,} + 2$. For example, if optical distribution, optical store, and delete processes are to be used, and one interactive retrieve from LAN-attached 3995 is required, the n value is 6 (4 processes + 2).

To verify the subsystem QBATCH, type DSPSBSD *LIBL/QBATCH on an AS/400 command line, and press Enter. Select option 1 and press Enter. Verify that the **Maximum jobs in subsystem** field contains a value greater than 1 or *NOMAX.

If the maximum jobs in the QBATCH subsystem is not greater than one or equal to *NOMAX, update the value by typing CHGSBSD *LIBL/QBATCH MAXJOBS(n) on an AS/400 command line and press Enter, where n is the maximum number of jobs in the subsystem.

To verify the QBATCH job queue, select option 6 on the Display Subsystem Description panel and press Enter. Verify that there is a queue entry QBATCH with a Max active value of greater than 1 or *NOMAX.

To update the job queue QBATCH, type CHGJOBQE SBSD(*LIBL/QBATCH) JOBQ(*LIBL/QBATCH) MAXACT(n) on the AS/400 command line and press Enter, where n is the number of jobs that can run concurrently in the job queue.

Starting and Using VisuallInfo for AS/400

To begin working with VisuallInfo for AS/400, follow these steps:

1. From the Installation and Migration menu, select 90 to sign off and press Enter. VisuallInfo for AS/400 prints the job log to a spool file for history tracking. This might take awhile to print based on the AS/400 processor and size of the job log. To bypass this function type SIGNOFF from the AS/400 command line.

2. Sign on to the AS/400 system as the system administrator that was created during installation.
3. Create the application profiles, as described in “Creating Profiles.”

Creating Profiles

To use VisuallInfo for AS/400, you must customize system and application profiles for your environment. For instructions on creating these profiles and the order in which you should create them, refer to the *IBM ImagePlus VisuallInfo for AS/400: System Administration Guide*.

See Chapter 5, “Planning for Optical Storage” on page 32 for an explanation of the optical system and storage class profiles.

Restoring the Softcopy Product Document Library

Shipped on a separate document tape or CD-ROM with the product, the entire product library is available in softcopy format. So that you and your users can access and use the books in the library, follow these steps. You must first manually restore the library from the shipped media. Follow these steps.

1. Sign on to the AS/400 system.
2. Load the media (tape, cartridge, or CD-ROM) that contains the product library. If you have tape, mount the VisuallInfo for AS/400 document tape, DOCTAP, on the AS/400 system and follow standard loading procedures presented in the *AS/400 System Operations: Operator's Guide*.
3. Use the RSTDLO command to manually restore the product document library from the VIBOOKS folder.
4. From each client workstation, assign a drive that corresponds to the VIBOOKS folder on the AS/400 that contains the product document library.

Once you have done this, you can access any book in the VisuallInfo for AS/400 library. See “Where to Find More Information” on page vi for specific instructions for viewing or printing any book in the product library.

Chapter 4. Installing the VisuallInfo for AS/400 Client

VisuallInfo for AS/400 includes a toolkit for the workstation APIs that you can use to develop a custom application. It also includes a client application that provides a graphical user interface (GUI) to VisuallInfo for AS/400 and high-level application programming interfaces (APIs) that you can use from Visual Basic or other application development environments. For more information about these APIs, refer to the *IBM ImagePlus VisuallInfo for AS/400: Application Programming Guide and Reference*.

Complete these tasks to properly install and configure the VisuallInfo for AS/400 client:

- Installing the client
- Configuring communications for VisuallInfo for AS/400
- Verifying installation and configuration

Installing the Client

During installation of VisuallInfo for AS/400, the VICLIENT folder is created to store the client software. Follow these steps to install the client.

1. Start Client Access/400.
2. Assign a workstation drive to the VICLIENT folder under the QDLS file system on the AS/400 that contains the VisuallInfo for AS/400 Client for Windows.
3. Run SETUP.EXE from the **Start** menu or from the Windows NT or 95 Explorer.
4. Follow the installation prompts and select the options you want to install on your workstation. When the **Type of Installation** window opens, select **Standard Client**.

Configuring VisuallInfo for AS/400 Communications

To use VisuallInfo for AS/400, you must install and configure a communications product that implements APPC and the common programming interface for communications (CPI-C). CPI-C lets you assign a workstation drive to an object directory on the AS/400. It is recommended that you use Client Access/400.

After installing one of these products, you might need to update the *network file table*, FRNOLINT.TBL. Residing on a client workstation, this ASCII file contains entries that identify one or more VisuallInfo for AS/400 servers to which a client can connect. The client application uses the **Ip2ListServers** API to access this table and display a list of servers during logon to control the connection to the server.

Here is an example of an entry in a network table, followed by a description of each parameter:

```
SERVER: AS400DS1 REMOTE APPC
LU_NAME = USIBMNR.AS400DS1
TP      = EKDCS01P.EKDLIB
MODE    = QPCSUPP
SERVER_TYPE = FRNLS400
```

AS400DS1

Name of the VisuallInfo for AS/400 server that is shown during logon of the VisuallInfo for AS/400 client.

USIBMNR.AS400DS1

Fully qualified logical unit (LU) name. You must configure this location as a partner LU name in the CPI-C section of your communication product.

EKDCS01P.EKDLIB

Transaction program (TP) name to be run. EKDCS01P is the name of the program that starts the VisuallInfo for AS/400 server interface. EKDLIB is the name of the AS/400 library where this program is stored.

QPCSUPP

Mode name to be used. If Client Access/400 is installed, this mode name is available on both the workstation and on the AS/400. As an alternative, **#INTER** is a default that is generally available. The mode name controls performance characteristics of the APPC session and application on the AS/400.

FRNLS400

Name of the VisuallInfo for AS/400 library server. You must enter this line exactly as shown. There is no configuration for an object server.

To allow many users to share the network table, define the environment variable *VI400_CONFIG_PATH* on each workstation in the Registry on Windows NT and in AUTOEXEC.BAT on Windows 95.

In addition to configuring the network table, you must configure the partner LU name as described above and define a connection to that server in Client Access/400. The VisuallInfo for AS/400 system administrator defines application profiles on the AS/400. In the server profile are one or more **Server ID** letters. You must use each as a drive letter on the workstation, assigning the appropriate object directory on the AS/400 to that drive letter. Every client workstation must use these drive letters.

Verifying Installation and Configuration

After installing the VisuallInfo for AS/400 client, you can run the VI400VFY program, shipped with VisuallInfo for AS/400, to verify proper configuration. To do this, you must use a user ID such as QVIADMIN that has already been defined in the VisuallInfo for AS/400 profile.

After prompting you for a user ID, password, and system name, VI400VFY logs on to the VisuallInfo for AS/400 server, creates an item and object, deletes the item and object, and logs off. It records any errors in VI400.LOG. By running this program, you can verify configuration of APPC, Client Access/400, the network table, access to the

VisualInfo for AS/400 shared folder, and that the specified user has been defined to VisualInfo for AS/400 with sufficient authority to perform these operations.

You can also use the sample VI400VFY.CPP program, shipped with VisualInfo for AS/400 in the AS/400 folder, as a template for creating your own verification programs.

Chapter 5. Planning for Optical Storage

This chapter explains how to customize VisuallInfo for AS/400 for use with IBM 3995 Optical libraries.

Before You Begin

Except for LAN model A23, only specially trained professional hardware service personnel should install the 3995 Optical Library Dataservers. Refer to the manuals that accompanied your optical equipment for more information about installation and configuration. See Table 11.

Table 11. Books Available for IBM 3995 Optical Libraries

Optical Equipment	Direct-attached	LAN-attached	Relevant Publications
For OS/400 V3R1 or V3R2	√		<i>IBM AS/400 Optical Library Dataserver Support/400 User's Guide and Reference</i>
For OS/400 V3R6 or later	√		<i>OS/400 Optical Support</i>
C2x and C4x models		√	<ul style="list-style-type: none">• <i>IBM 3995 Optical Library Dataserver Products: Introduction and Planning Guide for C-Series Models</i>• <i>IBM 3995 Optical Library Dataserver Products: Operator's Guide for C-Series Models</i>
A23 model		√	<i>IBM 3995 Optical Library Dataserver Products: Model A23 Guide to Operations</i>
All other models	√	√	<i>IBM 3995 Optical Library Dataserver Products: Introduction and Planning Guide</i>
		√	<i>IBM 3995 Optical Library Dataserver Products: User's Guide for Models 123, 122, 121, 113, 112, 111, 023, 022, 021</i>

Completing Setup for Use with VisuallInfo for AS/400

Once you have the 3995 installed and communicating with the AS/400, perform these tasks to complete setup, as described in this section:

1. Customize VisuallInfo for AS/400 for the 3995 Optical Library Dataserver
2. Add and initialize the optical cartridges for the 3995
3. Set up LAN-attached optical for direct retrieval (optional)
4. Address direct-attached performance considerations (optional)
5. Verify that you can store documents to optical storage

Customizing VisuallInfo for AS/400 for the 3995 Optical Library Dataserver

To customize VisuallInfo for AS/400 to access a 3995 Optical Library Dataserver, the system administrator must define the optical system in the following VisuallInfo for AS/400 profiles.

Optical system profile	Defines the optical configuration
Storage class profile	Defines how to store the object
Collection profile	Associates an object to a specific storage class

Refer to the *IBM ImagePlus VisuallInfo for AS/400: System Administration Guide* for information about profile maintenance.

Once the system administrator has defined the optical system to VisuallInfo for AS/400, verify that VisuallInfo for AS/400 users have the following:

- Access to the optical library to store and retrieve documents
- Authority to the Optical Library Dataserver Support/400

Refer to the *IBM AS/400 Optical Library Dataserver Support/400 User's Guide and Reference* for details on granting authority to access data on the 3995 and also if you have a non-English version of OS/400 on your AS/400 system.

Adding and Initializing Optical Cartridges

Based on the information you specified in the VisuallInfo for AS/400 Storage class profile, you are now ready to initialize optical cartridges in your 3995. You must also create the first optical directory and subdirectory, as defined in each storage class profile. VisuallInfo for AS/400 automatically creates subsequent directories and subdirectories. For instructions on completing these steps, refer to the manuals that accompanied your optical equipment. See Table 11 on page 32.

Setting up Windows NT Workstations for Direct Display from Optical

To display and print documents directly from optical without copying them to AS/400 DASD, enter NET USE H:\\IBM3995\\ALIAS on each Windows NT workstation from a command prompt, where *H* represents the specific optical system ID you defined in the VisuallInfo for AS/400 optical system ID profile for the LAN-attached 3995. As used in this command, IBM3995 is the computer name.

Addressing Direct-Attached Performance Considerations

Users of both VisuallInfo for AS/400 and direct-attached 3995 optical can improve performance by electing not to copy file attributes. These attributes are written to optical for each document stored on direct-attached 3995. However, optical store and optical retrieve functions in VisuallInfo for AS/400 do not use these file attributes, so you can specify that you do not want the attributes copied to optical. To do this, refer to the manuals that accompanied your optical equipment. See Table 11 on page 32.

Verifying Document Storage to Optical

You can perform an optical storage verification test by scanning test documents using VisuallInfo for AS/400 and storing them on the optical subsystem using VisuallInfo for AS/400 storage management. Before beginning this test, be sure that you have formatted several optical platters.

Follow these steps to run the test. Refer to the *IBM ImagePlus VisuallInfo: Client for Windows User's Guide* for information about scanning and to the *IBM ImagePlus VisuallInfo for AS/400: System Administration Guide* for more information about the collection profile.

1. Sign on to the AS/400 system with a valid VisuallInfo for AS/400 user profile. Scan the test data. Make sure the collection profile for the index class to be used for the test documents to be scanned indicates that **Store on optical** is set to Yes, optical storage method is set to 2, and storage class/optical system ID points to your 3995.
2. Verify that your storage class or optical system is set to store to the library or libraries you want to test.
3. Start the VisuallInfo for AS/400 optical store processor to perform the store operation to the 3995 Dataserver. The store processor remains active as long as store request records exist, before going into the delay wait state.
4. Verify that all store requests have been processed. Look at the EKD0080 error file on the server to be sure no errors caused the 3995 to go into the delay wait state.
 - a. On the dynamic console, select **Volume operations** menu.
 - b. Select the desired volume, folder, and subdirectory to list all stored documents.
5. To verify that storage was successful to the optical platter, perform the steps necessary for your type of optical. For more information, refer to the manuals that accompanied your optical equipment. See Table 11 on page 32.

Appendix A. Configuring a Stand-Alone Object Server

At this point in the installation process, you should have completed the following tasks:

- Install the VisuallInfo for AS/400 library (primary) server.
- Install the VisuallInfo for AS/400 object (secondary) server.

If you have completed these tasks, you are ready to configure VisuallInfo for AS/400 as a stand-alone object server.

Before You Begin

If you already have user profiles on the AS/400 system, you do not have to create new user or group profiles. However, previously existing users must be authorized to access the panel, file, and program libraries (specified on the Primary Processor Installation panel), and these libraries must exist in the users' library lists. You can authorize access to libraries by using the GRTOBJAUT command from an AS/400 command line. Each user must be enrolled in the system directory using the ADDDIRE command.

If users do not have the appropriate authorities, change their user profiles using the CHGUSRPRF AS/400 command. See *IBM ImagePlus Workfolder Application Facility for AS/400: System Administration Guide* for details on user profiles. They should also have access to any object directories and subdirectories created. If they do not, use the appropriate AS/400 command to allow access to the restored and newly created directories and subdirectories.

Considerations for a Secondary AS/400 Processor

Before installing VisuallInfo for AS/400 on a secondary AS/400 processor, be sure the following prerequisites have been satisfied:

1. On the primary AS/400 processor, you must make sure the secondary AS/400 processor is authorized to the VisuallInfo for AS/400 file library on the primary processor for DDM file manipulations. Assigning authorities involves using an AS/400 GRTOBJAUT (Grant Object Authority) command. To grant authorization to the file library, log on the primary AS/400 processor as the security officer and enter the following commands on an AS/400 command line:

```
GRTOBJAUT OBJ(library/*ALL) OBJTYPE(*ALL) USER(profile) AUT(*ALL)
GRTOBJAUT OBJ(QSYS/library) OBJTYPE(*LIB) USER(profile) AUT(*ALL)
```

library

Name of the VisuallInfo for AS/400 file library for the primary AS/400 (for example, EKDLIBFIL).

profile

If you have a default user defined in the communications (QCMN) subsystem, use the name of that default user. Otherwise, if no default user is defined, use QUSER.

2. The system date on the primary and secondary AS/400 processors must be the same.
3. The secondary AS/400 processor is set up on the IBM Token-Ring Network and can communicate with the primary AS/400 processor and any other secondary AS/400 processors. If your AS/400 processors are running at security level 20 or above, the device description for the primary and secondary processors must have the SECURELOC parameter set to *YES. This parameter is not applicable if the device also specifies APPN(*YES). In this case, you must create a remote configuration list on each system, and specify that the Remote Loc parameter is set to *YES. These parameters are used to secure the communications between AS/400 processors. Refer to the *IBM AS/400 Communications: User's Guide* for more information about setting up communications between AS/400 processors and creating remote configuration lists.

For a remote configuration list to take effect, all devices for the particular remote location must be varied off. To make sure that all devices are varied off, enter `WRKCFGSTS *DEV *LOC RMTLOCNAME(remote location)` at an AS/400 command line, where *remote location* is the name of the remote location that you want to define as a secure location.

4. The Token-Ring local area network (LAN) addresses for secondary AS/400 processors are set for all VisualInfo for AS/400 client workstations.

The CONFIG.PCS file located in your Client Access/400 directory must contain one of the following lines for each AS/400 processor:

```
TRLI <system name>, <token-ring address>
```

```
ADRS <system name>, <AS/400 name>
```

5. Client Access/400 is installed on all AS/400 processors (primary and secondary) and on all ImagePlus workstations.
6. Client Access/400 has been updated with the addresses of all AS/400 processors, primary and secondary.
7. Each AS/400 processor is assigned as a system shared folder in Client Access/400.
8. If a library named EKDTEMP already exists on the system, you must either rename or delete it.

Bibliography

The following is a bibliography of related IBM publications that you might find helpful while using this book. See “Where to Find More Information” on page vi for information about the VisualInfo for AS/400 product library.

You can request copies of IBM publications from your IBM representative or the IBM branch office serving your area.

IBM AS/400 Publications

Communications and Connectivity

- *IBM AS/400 Communications: Advanced Peer-to-Peer Configuration Guide*, GG24-4023
- *IBM AS/400 Communications: Advanced Peer-to-Peer Network User's Guide*, SC41-8188
- *IBM AS/400 Communications: Advanced Program-to-Program Communication Programmer's Guide*, SC41-8189
- *IBM AS/400 Communications: User's Guide and Reference*, SC09-1168
- *IBM AS/400 Communications Configuration*, SC41-3401
- *IBM AS/400 Communications Management*, SC41-3406
- *IBM AS/400 Network and Systems Management*, SC41-3409
- *IBM AS/400 Network Planning Guide*, GC41-9861

Languages

- *AS/400 Languages: COBOL/400 User's Guide*, SC09-1812
- *AS/400 Languages: COBOL/400 Reference*, SC09-1813
- *AS/400 Languages: COBOL/400 Reference Summary*, SX09-1285
- *AS/400 Languages: RPG/400 User's Guide*, SC09-1816
- *AS/400 Languages: RPG/400 Reference*, SC09-1817
- *ILE RPG/400 Reference Summary*, SX09-1261

- *ILE COBOL/400 Programmer's Guide*, SC09-1522
- *ILE COBOL/400 Reference*, SC09-1523
- *ILE COBOL/400 Reference Summary*, SX09-1260
- *AS/400 Programming: Control Language Programming*, SC41-3721
- *AS/400 Programming: Control Language Reference*, SC41-3722
- *ILE RPG/400 Programmer's Guide*, SC09-1525
- *ILE RPG/400 Reference*, SC09-1526
- *ILE RPG/400 Reference Summary*, SX09-1261

Planning, Installation, and Migration

- *IBM AS/400 Local Device Configuration*, SC41-3121
- *IBM AS/400: Physical Planning Guide*, GA41-9571
- *IBM AS/400 Software Installation*, SC41-3120
- *IBM AS/400 System Support: Installation Guide - 9404*, SY31-9066
- *IBM System Support AS/400: Installation Guide - 9406* (shipped with the product)

Programming

- *IBM AS/400 Programming: Backup and Recovery Guide*, SC41-8079
- *IBM AS/400 Programming*, SC41-3721
- *IBM AS/400 Programming: Security Concepts and Planning*, SC41-8083
- *Query/400: User's Guide*, SC41-3210

System Use

- *IBM AS/400 Getting Started on the AS/400 System*, SC41-3204
- *IBM AS/400 PC Support: Technical Reference*, SC41-8091
- *IBM AS/400 Q & A Database Coordinator's Guide*, SC41-8086
- *IBM AS/400 System Operation*, SC41-3203
- *IBM AS/400 System Operation for New Users*, SC41-3200
- *IBM AS/400 System Operations: Operator's Guide*, SC41-8082

- *IBM AS/400 System Startup and Problem Handling*, SC41-3206
- *OS/400 Infoseeker Getting Started*, SC41-3001
- *OS/400 Integrated File System Introduction*, SC41-3711

System Management

- *IBM AS/400 Security–Basic*, SC41-3301
- *IBM AS/400 Security–Reference*, SC41-3302
- *OS/400 Backup and Recovery–Basic*, SC41-3304
- *OS/400 Backup and Recovery–Advanced*, SC41-3305

IBM Client Access

Windows

- *IBM Client Access/400 for Windows: Getting Started*, SC41-3530
- *IBM Client Access/400 for Windows: User's Guide*, SC41-3532

IBM ImagePlus VisualInfo

- *IBM ImagePlus VisualInfo Getting Started*, GC31-9051
- *IBM ImagePlus VisualInfo Planning and Installation Guide*, GC31-7772
- *IBM ImagePlus VisualInfo System Administration Guide*, GC31-7774
- *IBM ImagePlus VisualInfo Application Programming Guide for Windows*, GC31-9055
- *IBM ImagePlus VisualInfo Application Programming Guide, Volume 1*, GC31-9063
- *IBM ImagePlus VisualInfo Application Programming Guide, Volume 2*, GC31-9061

IBM 3995 Compact Optical Library Dataserver

Direct-Attached

- *IBM AS/400 Optical Library Dataserver Support/400: User's Guide and Reference*, SC41-0035
- *OS/400 Optical Support*, SC41-4310

LAN-Attached

- *IBM 130 mm Rewritable Optical Disk Cartridge Requirements*, SA37-0261
- *IBM 3995 All LAN Models Reference*, GA32-0147
- *IBM 3995 AS/400 Optical Library Dataserver: Operator's Guide Models A43, 143, 142, 043, and 042*, GA32-0140
- *IBM 3995 Optical Library Dataserver Products: Introduction and Planning Guide for C-Series Models*, GA32-0350
- *IBM 3995 Optical Library Dataserver Products: Model A23 Guide to Operations*, GA32-0291
- *IBM 3995 Optical Library Dataserver Products: Operator's Guide for C-Series Models*, GA32-0352
- *IBM 3995 Optical Library Dataserver Products: User's Guide for Models 123, 122, 121, 113, 112, 111, 023, 022, 021*, GA32-0141

Both Direct- and LAN-Attached

- *IBM 3995 Optical Library Dataserver Products: Introduction and Planning Guide*, GA32-0121
- *IBM 3995 Optical Library Dataserver Products: Optical Disk Format*, GA32-0224
- *IBM 3995 Optical Library Dataserver Products: Optical Disk Cartridge Requirements 130 mm Write-Once 1024 Bytes/Sector*, GA32-0146
- *IBM 3995 Optical Library Dataserver Products: Reference for C-Series Models*, GA32-0351
- *IBM 3995 Optical Library Dataserver Products: Safety*, GA32-0148

Glossary

This glossary defines terms and abbreviations used in this book and the product document library. Refer to the *IBM Dictionary of Computing*, ZC20-1699-09, for terms or abbreviations that do not appear here.

The following cross-references are used in this glossary:

- **Contrast with.** This refers to a term that has an opposed or substantively different meaning.
- **See.** This refers the reader to multiple-word terms in which this term appears.
- **See also.** This refers the reader to terms that have a related, but not synonymous, meaning.
- **Synonym for.** This indicates that the term has the same meaning as a preferred term, which is defined in the glossary.

A

access list. A list consisting of one or more individual user IDs or user groups and the *privilege set* associated with each user ID or user group. You use access lists to control user access to items in VisualInfo for AS/400. The items that can be associated with access lists are the data objects stored by users, *index classes* and subsets, *workbaskets*, and *workflows*.

action list. In Workfolder Application Facility work management, an approved list of the actions, defined by a supervisor, that a user can perform on work packages. An action list defines options, such as printing or displaying work packages, and the function keys that are available for use.

active case. A case that was entered and indexed, assigned to a queue, and has been previously pended, unqueued, assigned to a process, or assigned to a workbasket. A case with this status can be accessed through the Work any case, Work queued case, or Review any case menu options.

address ID profile. A control file used in Workfolder Application Facility that contains names and addresses.

ad hoc route. A route that is not part of a defined Workfolder Application Facility work management process. An *ad hoc route* is started when a user creates

a work package and assigns it directly to a workbasket. The user manually routes the work package from one workbasket to another by reassigning it.

administrator. The person responsible for system management, controls, and security, as well as case statistics. Synonymous with system administrator.

Advanced Peer-to-Peer Networking (APPN). Data communications support that routes data in a network between two or more APPC systems that are not directly attached.

advanced program-to-program communications (APPC). Data communications support that allows programs on an AS/400 system to communicate with programs on other systems having compatible communications support. This communications support is the AS/400 method of using the SNA LU session type 6.2 protocol.

annotation. An added descriptive comment or explanatory note.

APAR. Authorized Program Analysis Report.

API. Application programming interface.

application programmer. A programmer who designs programming systems and other applications for a user's system.

application program interface (API). The formally-defined programming language interface which is between an IBM system control program or a licensed program and the user of the program.

APPC. Advanced program-to-program communications.

APPN. Advanced Peer-to-Peer Networking.

application program interface (API). The formally-defined programming language interface which is between an IBM system control program or a licensed program and the user of the program.

archiving. The storage of backup files and any associated journals, usually for a given period of time.

AS/400. Application System/400.

AS/400 object directory profile. A control file used in Workfolder Application Facility to identify AS/400 object directories used for image document storage.

attribute. Used in VisualInfo for AS/400 APIs, a single value associated with an item (document or folder). Each index class can have up to eight attributes.

automatic importing. The process that operates in the background to complete the importing of documents when it is requested through the facsimile process or the "set up automatic import only" option.

automatic indexing. The indexing process that operates in the background to complete the indexing of documents introduced to the system through the scan and batch index function.

B

binary large object (BLOB). A large stream of binary data treated as a single object.

C

capture. In optical character recognition, to gather picture data from a field on an input document, using a special scan.

cartridge. (1) A storage device that consists of magnetic tape, on supply and takeup reels, in a protective housing. (2) For optical storage, a plastic case that contains and protects optical disks, permitting insertion into an optical drive. See also *optical disk* and *cartridge storage slots*.

cartridge storage slots. An area in an optical library where cartridges are stored.

case. A uniquely identifiable work item initiated by a user. Cases may be: Active (open and being worked), Pended (suspended awaiting further information), Closed (processing is complete), New, or Not Queued.

case file. A file that contains one entry for each case.

case history file. A file that contains the history of actions against each case.

case ID. A system-assigned identifier that is chronological, based on the time that indexing occurred. Every case has a unique case ID.

client application. An application written with the VisualInfo for AS/400 APIs to customize a user interface.

closed case. A case that was closed and cannot be reopened. A closed case is not assigned to a queue. A case with this status can be accessed through the Review any case menu option.

closing a case. Ending a case permanently. Documents in a closed case may be archived for future access.

collection. (1) In VisualInfo for AS/400, a group of objects with a similar set of storage management rules and contained within a *storage group*. Every object is stored in a collection. (2) In Workfolder Application Facility, it provides categories for entered documents and is used to match incoming documents with outstanding requests. Primarily used in case processing, collections can also be used when indexing documents into file cabinets.

collection point. In Workfolder Application Facility work management, the point where work packages wait for specific events to either occur or become synchronized before processing can continue. A collection point is part of a work process. For example, a collection point is where work packages that are part of the "open a new account" work process must wait until credit information is verified. See also *decision point*.

collection profile. A file that contains one entry for each type of document to be processed.

content class. A number that indicates the data format of an object, such as MO:DCA, TIFF, or ASCII.

control files. Files that govern the categories of work performed by an operator and the types of documents the system recognizes.

convenience workstation. A display workstation equipped with a printer and a scanner.

cross-system importing. The process that imports cases and documents to one Workfolder Application Facility system from another.

cross-system exporting. The process that exports cases and documents from one Workfolder Application Facility system to another.

current document. A document that is being processed.

customization. The process of designing a data processing installation or network to meet the requirements of particular users.

D

DASD. Direct access storage device.

DASD system ID profile. A file used to define the roles of AS/400 processors in the Workfolder Application Facility system.

DDM. Distributed data management.

DBCS. Double-byte character set.

decision point. In Workfolder Application Facility work management, the point where work packages continue on their current route or switch to an alternate route, depending on the specific information in each work package. Decision points are tables consisting of variable names, values, and routes. A decision point is part of a work process. For example, a decision point is where work packages that are part of the "open a new account" work process receive approval or not based on credit information.

See also *collection point*.

destager. A function of the object server that moves objects from the *staging area* to the first step in the object's *migration policy* or *management class*.

direct access storage device (DASD). A device in which access time is effectively independent of the location of the data.

distributed data management (DDM). A feature of the System Support Program that lets an application program work on files that reside in a remote system.

display workstation. An image processing workstation used primarily for displaying documents that have been previously scanned or imported into the AS/400 system.

document. (1) An item containing one or more base parts. See also *collection point*. (2) Information and the medium on which it is recorded that generally have permanence and that humans or machines can read. (3) A named, structural unit of text that can be stored, retrieved, and exchanged among systems and users as a separate unit. Also referred to as an *object*. A single document can contain many different types of base parts, including text, images, and objects such as spreadsheet files.

document content architecture (DCA). An architecture that guarantees information integrity for a document being interchanged in an office system network. DCA provides the rule for specifying form and meaning of a document. It defines revisable form text (changeable) and final form text (unchangeable).

document type. Provides categories for entered documents and are used to match incoming documents with outstanding requests. Primarily used in case processing, document types can also be used when indexing documents into file cabinets.

document type profile. A file that contains one entry for each type of document to be processed.

document working set. A set of document images selected from a menu that Workfolder Application Facility provides. This set of document images is sent to the ImagePlus workstation for display.

double-byte character set (DBCS). A set of characters in which each character occupies two bytes. Languages, such as Japanese, Chinese, and Korean, that contain more symbols than can be represented by 256 code points, require double-byte character sets. Entering, displaying, and printing DBCS characters requires special hardware and software support.

E

empty case. A case that has no documents.

export. In Workfolder Application Facility, a process used to write data from a document in a system folder to a file. Export and import processes can be used to transfer documents among Workfolder Application Facility systems.

F

facsimile configuration profile. A control file that lets the system administrator associate Facsimile Support for OS/400 with Workfolder Application Facility.

fax exporting. A process that operates in the background to send documents requested for fax transmission to a fax server.

fax importing. The importing process that operates in the background to forward fax documents received by the fax server.

FIFO (first in, first out). A queueing technique in which the next item to be retrieved is the item that has been in the queue for the longest time.

file cabinet. A component of Workfolder Application Facility that provides document storage and retrieval capabilities designed to help manage selected documents.

file cabinet code. Acts as the file cabinet name.

first in first out (FIFO). A queueing technique in which the next item to be retrieved is the item that has been in the queue for the longest time.

focus control. In Workfolder Application Facility, a feature that lets the system administrator decide whether Workfolder Application Facility and ImagePlus Workstation Program or the user controls the active window.

folder. (1) In VisuallInfo for AS/400, an object that can contain other folders or documents. (2) In Workfolder Application Facility, the area in the AS/400 system where images are stored after successful scanning or importing.

folder balancing. In the AS/400, the process by which documents are distributed evenly among the available folders in the system.

folder manager. In VisuallInfo systems other than VisuallInfo for AS/400, the term used to describe the data model and a subset of the APIs. In VisuallInfo for AS/400, this term refers to the entire set of VisuallInfo for AS/400 APIs.

folder name. A 1- to 12-character user-defined word that names a folder. One period (.) is allowed. If the folder name is more than 8 characters, the ninth character must be a period. This can be followed by a 1- to 3-character extension.

folder path. A folder name, followed by one or more additional folder names, where each preceding folder is found. Each folder in the path must be separated by a slash (/). A folder path can consist of 1 to 63 characters.

forms creation utility. A utility that allows the system administrator to capture a preprinted form as an image and to define the content and format of the form.

G

Group III. A compression algorithm that conforms to a standard promulgated by the International Telegraph and Telephone Consultative Committee (CCITT).

H

high-speed indexing. The indexing process that operates in the background to complete the indexing of documents that were input into the system using the high-speed scanning function.

high-speed scanner workstation. A display workstation equipped with a high-speed scanner.

HTML. Hypertext markup language.

I

image. (1) A single page of information; the result of scanning, or digitizing, a single sheet of paper. (2) An electronic representation of a picture produced by means of sensing light, sound, electron radiation, or other emanations from the picture or reflected by the picture. An image can also be generated directly by software without reference to an existing picture. See also *page image*.

image data. Rectangular arrays of raster information that define an image. Image data is often created originally by a scanning process.

image host. The system where scanned and imported documents are permanently stored. See also *optical library subsystem*.

Image Object Content Architecture (IOCA). A structured collection of constructs used to interchange and present images.

image spool file. A file that contains sorted, merged, and completed print records ready for print.

image workstation. A programmable workstation that can perform image functions.

import data file. An AS/400 database file that contains data for one or more documents. Using data in the file, Workfolder Application Facility creates documents that can be stored and indexed just like scanned documents.

importing. A process by which documents are input into AS/400 using files rather than the scanning process. Imported documents can be stored in Workfolder Application Facility on DASD and optical, and displayed and printed, in the same manner as scanned documents.

import page ID profile. A file that contains the form overlay and fields specified for each page ID defined for a document type whose data type is 01.

inbound. Pertaining to communication flowing in a direction towards the application program from external sources, such as a transmission from a terminal to the application program. Contrast with *outbound*.

index. To associate a document with a case or identifier.

index class. A category for storing and retrieving objects, consisting of a named set of attributes known as *key fields*. When you create an item in VisualInfo for AS/400, your application must assign an index class and supply the key field values required by that class. An index class identifies the automatic processing requirements and storage requirements for an object.

indexing. The three-step process consisting of viewing a document, specifying an identifier for the document, and before creating a new case, or matching the document with an existing case.

instance. In work management, an occurrence of a work package within a process. If the process consists of parallel routes, multiple instances of a work package exist.

IOCA. Image Object Content Architecture.

item. (1) Set of attributes and objects—one or more files containing image data, annotations, notes, or other content—that together represent a physical document, such as an insurance claim or a folder.

See also *document*. (2) The smallest unit of information that the library server administers. An item can be a folder, document, workbasket, or workflow. Referred to as an *object* outside of library server functions.

J

journal. A special-purpose file or data set that can be used to provide a record of operator and system actions used to recover data and to identify operator actions that resulted in a problem.

journaling. (1) The process of recording changes made in a physical file member in a journal. Journaling allows you to reconstruct a physical member by applying the changes in the journal to a saved version of the physical file member. (2) The process of recording information sequentially in a database.

K

key field. An attribute of an item that represents a type of information about that item. For example, a customer data item might have key fields for the customer's name and social security number.

keyword. A name or symbol that identifies a parameter.

keyword field. A field enabled for input that provides data for a single keyword that is defined for a file cabinet.

keyword value. The input specified in the field for each keyword.

L

LAN. Local area network.

language profile. A control file used in Workfolder Application Facility to define country-specific parameters, such as time and date formats.

last in first out (LIFO). A queueing technique in which the next item to be retrieved is the item most recently placed in the queue.

library server. The component of VisualInfo for AS/400 that contains index information for the items stored on one or more *object servers*.

LIFO (last in, first out). A queueing technique in which the next item to be retrieved is the item most recently placed in the queue.

local area network (LAN). A computer network located on a user's premises within a limited geographical area.

LU 6.2. In Systems Network Architecture (SNA), a type of session between two application programs in a distributed processing environment, using the SNA character string or a structured-field data stream; for example, an application program using CICS communication with an AS/400 application.

M

Machine-Generated Data Structure (MGDS). (1) An IBM structured data format protocol for passing OCR (Optical Character Recognition) data among various applications. When workstations use OCR facility to create coded data from scanned images, those coded data are formatted into MGDS and passed to other applications for further processing. (2) Data extracted from an image and put into generalized data stream (GDS) format.

magnetic storage. A storage device that uses the magnetic properties of certain materials.

magnetic tape. A tape with a magnetizable layer on which data can be stored.

magnetic tape device. A device for reading or writing data from or to magnetic tape.

masking. The action of obscuring part of the image of a document so that it is not visible to the viewer.

MGDS. Machine-Generated Data Structure.

Mixed Object: Document Content Architecture (MO:DCA). An IBM architecture developed to allow the interchange of object data among applications within the interchange environment and among environments.

Mixed Object: Document Content Architecture-Presentation (MO:DCA-P). A subset architecture of MO:DCA that is used as an envelope to contain documents that are sent to the ImagePlus workstation for displaying or printing.

MO:DCA. Mixed Object: Document Content Architecture.

MO:DCA-P. Mixed Object: Document Content Architecture-Presentation.

MRI. Machine-readable information.

N

national language support (NLS). The modification or conversion of a United States English product to conform to the requirements of another language or country. This can include enabling or retrofitting of a product and the translation of nomenclature, MRI, or product documents.

network. An arrangement of programs and devices connected for sending and receiving information.

network table file. A text file created during installation that contains the system-specific configuration information for each node for each VisualInfo for AS/400 server. Each server must have a network table file that identifies it. The name of the network table is always FRNOLNT.TBL.

new case. A case that was entered and indexed, assigned to a queue, and has not been previously pended, unqueued, assigned to a process, or assigned to a workbasket. A case with this status can be accessed through the Work any case, Work queued case, or Review any case menu options.

NLS. National language support.

not queued case. A case that was entered and indexed, and is not assigned to a queue. A case with this status can be accessed through the Work any case or Review any case menu options.

O

object. (1) An item upon which actions are performed. (2) A collection of data referred to by a single name. (3) The smallest unit within the system. For ImagePlus systems, this is typically a single-image document. (4) Any binary data entity stored on an object server. In the VisualInfo for AS/400 data model, *object* specifically refers to a document's contents or parts.

object authority. The right to use or control an object.

object directory. A control file used in Workfolder Application Facility to identify AS/400 object directories used for image document storage.

object server. The component of IBM ImagePlus VisualInfo for AS/400 that physically stores the objects or information that client applications store and access.

OCR. Optical character recognition.

operator. The person who handles daily system administrative tasks.

optical. Pertaining to optical storage.

optical cartridge. A storage device that consists of an optical disk in a protective housing. See also *cartridge*.

optical character recognition (OCR). Character recognition that uses optical means to identify graphic characters.

optical disk. A disk that contains digital data readable by optical techniques. Synonymous with digital optical disk.

optical drive. The mechanism used to seek, read, or write data on an optical disk. An optical drive may reside in an optical library or as a stand-alone unit.

optical drive profile. A control file used in Workfolder Application Facility to define the optical controller used for the optical storage of documents.

optical libraries. Software used to store image data on optical platters. Only direct-attached optical systems contain optical libraries.

optical library subsystem. The hardware and software that provides the long-term storage of the image data. See also *image host*.

Optical Storage Support. Software that supports communication between stand-alone optical disk drives, the optical library, and VisualInfo for AS/400 and Workfolder Application Facility. The software runs on the System/36 5363 unit serving as the optical controller.

optical system profile. A file used to define the optical controller used for the optical storage of documents.

optical systems. Hardware used to store image data on optical platters. Only direct-attach optical systems contain optical libraries.

optical volume. One side of a double-sided optical disk containing optically stored data.

OS/2. Operating System/2.

OS/400. Operating System/400.

outbound. Pertaining to a transmission from the application program to a device. Contrast with *inbound*.

output class. A unique name assigned to a specific time frame when faxes are eligible to be transmitted.

output profile. A file that defines the content of each output form.

override. A parameter or value that replaces a previous parameter or value.

P

page. A single physical medium; for example, an 8.5-inch by 11-inch piece of paper.

page image. The electronic representation of a single physical page. The bounds of a page image are determined by the electromechanical characteristics of the scanning equipment, along with the image capture application specifications in the receiving data processing system.

page scan. The electromechanical process of scanning a physical page (paper) to create a bit image of the page.

pan. Progressively translating an entire display image to give the visual impression of lateral movement of the image.

PDF. Portable document format.

pend. To suspend a case while awaiting additional information or action, such as a particular document type or date.

pending case. A case that was pending through casework, waiting for more information. A pending case is not assigned to a queue. A case with this status can be accessed through the Work any case or Review any case menu options.

pending. Awaiting further information or action on a case.

platter. See *optical disk*.

prefix. (1) A code dialed by a caller before being connected. (2) A code at the beginning of a message or record.

Presentation Text Object Content Architecture (PTOCA). An architecture developed to allow the interchange of presentation text data.

primary processor. In a group of processing units, the main processing unit and its internal storage through which all other units communicate.

printer workstation. A display workstation equipped with a printer.

priority. A rank assigned to a task that determines its precedence in receiving system resources.

privilege. An authorization for a user to either access or perform certain tasks on objects stored in VisualInfo for AS/400. The system administrator assigns privileges.

privilege set. (1) In VisualInfo for AS/400, collection of *privileges* for working with system components and functions. The system administrator assigns privilege sets to users (user IDs) and user groups. (2) In the work management system in Workfolder Application Facility, an approved list of the actions, defined by a supervisor, that a user can perform on work packages. An privilege set defines options, such as printing or displaying work packages, and the function keys that are available for use.

process item. Item used as a building block in a work process.

profile. A file that governs the categories of work performed and the types of users recognized by the system.

program temporary fix (PTF). A temporary solution or bypass of a problem diagnosed by IBM as resulting from a defect in a current unaltered release of the program.

PTF. Program temporary fix.

PTOCA. Presentation Text Object Content Architecture.

Q

queue. A line or list of items waiting to be processed; for example, cases to be worked or messages to be displayed.

queue ID profile. A file that contains one entry for each active case. Each case is indexed by queue ID, queue type, and creation date and time.

R

reindexing. The process of indexing documents that were previously indexed incorrectly. This process is the same as the indexing process.

render. To take data that is not typically image-oriented and depict or display it as an image. In VisualInfo for AS/400, you can render word-processing documents as images for display purposes.

resolution. In computer graphics, a measure of the sharpness of the image, expressed as the number of lines and columns on the display screen or the number of pels per unit of area.

rotate. A function of the document display window and the scan document display window. The orientation depends on the option selected.

route. In work management, a set of steps that move work between workbaskets, collection points, and decision points.

S

SBCS. Single-byte character set.

scan overlap. The process by which a document is scanned while a previously scanned document is stored on DASD.

scanner. A device that examines a spatial pattern one part after another and generates analog or digital signals corresponding to the pattern. (I)

scanner workstation. A display workstation equipped with a scanner.

scanning. A physical process that enters documents into an ImagePlus workstation. After a document has been scanned, it can be stored permanently.

scanning and batch indexing. An efficient scanning and indexing option that overlaps the scanning of a document with the storing of another document, while an indexing process operates automatically in the background.

search criteria. In VisualInfo for AS/400, the text string used to represent the logical search to be performed on the library server.

secondary processor. In a group of processing units, any processing unit other than the primary unit.

server. On a local area network, a data station that provides facilities to other data stations; for example, a file server, a print server, a mail server.

side by side. A function on the document display window that displays two pages of a multipage document next to each other.

single-byte character set (SBCS). A set of characters in which each character occupies one byte.

slot. (1) A position in a device used for removable storage media. (2) A space in an optical library where an optical cartridge is stored. See *optical cartridge*.

SMS. System-managed storage.

spool file. A file that holds output data waiting to be printed or input data waiting to be processed by a program. Workfolder Application Facility can convert a spool file to an import data file.

spool writer. The part of the System Support Program that prints output saved in the spool file.

staging. The process of moving a stored object from an offline or low-priority device back to an online or higher priority device, usually on demand of the system or on request of a user. When a user requests an object stored in permanent storage, a working copy is written to the *staging area*.

stand-alone. Pertaining to an operation that is independent of any other device, program, or system.

step number. In work management, the numbers that specify the order in which route commands are processed. Each step number must have an associated command telling the route what action to take.

storage. The action of placing data into a storage device.

storage class. A storage class, in combination with an optical system identifier, defines the set of optical volumes upon which documents can be stored. Documents with the same storage class and optical system ID are stored on the same optical volume.

storage method. In Workfolder Application Facility, a means of grouping documents together for storage to an optical disk. Workfolder Application Facility provides the

following storage methods: file cabinet, collection, prioritized, and system assigned (optical distribution).

storage system. A generic term for storage in VisuallInfo for AS/400.

subsystem. A secondary or subordinate system, or the programming support part of a system that is usually capable of operating independently of or asynchronously with a controlling system.

suspend a case. To end case processing temporarily.

system administrator. The person who manages the ImagePlus workstation, the Optical Library Subsystem, and the departmental processor. The system administrator helps with problem determination and resolution. Synonymous with *administrator*.

system ID profile. A control file used in Workfolder Application Facility to define the roles of AS/400 processors in the system.

system-managed storage (SMS). The VisuallInfo for AS/400 approach to storage management. The system determines object placement, and automatically manages object backup, movement, space, and security.

System Support Program (SSP). A group of IBM-licensed programs that manage the running of other programs and the operation of associated devices, such as the display station and printer. The SSP also contains utility programs that perform common tasks, such as copying information from diskette to disk.

T

tape. See *magnetic tape*.

tape cartridge. See *cartridge*.

U

user. (1) Anyone requiring the services of VisuallInfo for AS/400. This term generally refers to users of client applications rather than the developers of applications, who use the VisuallInfo for AS/400 APIs. (2) In Workfolder Application Facility, the individual who performs input and case processing.

user activity file. A file that contains one entry for each user. It contains item counts and productivity statistics.

user exit. (1) A point in an IBM-supplied program at which a user exit routine may be given control. (2) A programming service provided by an IBM software product that may be requested during the processing of an application program for the service of transferring control back to the application program upon the later occurrence of a user-specified event.

user exit routine. A routine written by a user to take control at a user exit of a program supplied by IBM.

user fields. Data fields defined within the user exit programs. The user exit programs process the data and values passed into these fields.

user ID profile. A file that contains one entry for each user. The entries contain information such as processing eligibility.

V

volume. A certain portion of data, together with its data carrier, that can be handled conveniently as a unit.

W

workbasket. In work management in Workfolder Application Facility for AS/400, a container that holds work packages. Workbaskets can be used as parts of process definitions or ad-hoc routes. In VisualInfo for AS/400, a logical location within the VisualInfo for AS/400 system to which work packages can be assigned to wait for further processing.

A workbasket definition includes the rules that govern the presentation, status, and security of its contents.

workbasket privilege set. A list that specifies which options and function keys operate on indexing and work with work package panels.

work management. A system that lets an enterprise define a work process and environment to automate workflow and control business processes.

work management case. A case that was entered and indexed, and has been assigned to either a process or a workbasket. A work management case is not assigned to a queue. A case with this status can be accessed through the Review any case, Work with workbaskets, or Search for work packages menu options.

work order. The sequence of work packages in a workbasket.

work package. The work that is routed from one location to another. A work package can consist of an unindexed document, a file cabinet document, a Workfolder Application Facility case, or a user-defined collection of objects. It can also be empty, such as when you first create it and before it contains any work items. Work packages can be routed automatically by defined processes, or users can manually route work packages in an ad-hoc manner to workbaskets they specify.

work process. In work management, the series of steps, events, and rules through which a work package flows. A work process is a combination of the route, collection point, and decision point through which a predefined type of work package must progress.

workflow. A sequence of *workbaskets* that a document or folder travels through while it is being processed.

working set. A set of pages residing in the workstation, which can constitute one or more documents.

workstation. A computer processor unit, image display unit, scanners, and printers with which the user performs input, indexing, and printing.

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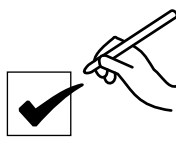
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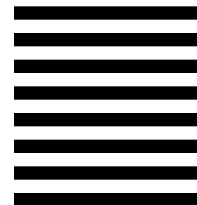
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