



# FileNet Document Publisher

## Installation Guide

Release 7.5.0

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**FileNet Corporation**  
**3565 Harbor Boulevard**  
**Costa Mesa, California 92626**  
**800.FILENET (345.3638)**  
**Outside the U.S., call:**  
**1.714.327.3400**  
**[www.filenet.com](http://www.filenet.com)**

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## CHAPTER 1

# ***Introducing FileNet Document Publisher***

FileNet Document Publisher consists of a workstation component, FileNet Document Publisher Station, and a server component, FileNet Document Publisher Server. It also includes a scheduling utility, FileNet Document Publisher Scheduler, which you can use to automate tasks on the Server.

With Document Publisher Station, you can build projects on your file system and then translate and publish them manually to create web publications. Through the Document Publisher Scheduler interface to Document Publisher Server, you can automate source document translation, as well as project staging and publishing. Document Publisher Scheduler is installed automatically during the installation of Document Publisher Station and Document Publisher Server.

Also in this guide:

- Chapter 2 explains how to install Document Publisher Station and Document Publisher Server.
- Chapter 3 covers steps specific to Document Publisher Server.
- Chapter 4 explains how to update from a previous version of FileNet Document Publisher.

## **System requirements**

Before you begin installing FileNet Document Publisher, confirm that each machine satisfies the minimum system requirements listed in the following section.

To successfully run Document Publisher Station, you will need the following:

- PC with a Pentium II 200 MHz or higher processor
- Microsoft Windows 2000 (SP1 or later) or Windows XP
- CD-ROM drive
- 800x600 VGA display or better. We recommend a color display with 256 colors or more
- 50 MB of free hard disk space
- 32 MB RAM
- Microsoft Internet Explorer 4.0 or higher is required to communicate with your FileNet repository. To preview your web pages, you can use either Internet Explorer or Netscape Navigator 6.01 or higher.

If Document Publisher Station and Document Publisher Server are installed to the same directory on the same machine, you will require only a little more hard disk space than for Document Publisher Station alone. If Document Publisher Server is installed on a separate machine, you will need another 40 MB of free hard disk space on that machine.

You also need additional disk space each time you translate source documents into HTML format. The disk space required can vary significantly, depending on the size and number of the documents you translate as well as on the number and nature of the graphics. At the very least, you will likely need 25-50 MB of free disk space.

## Documentation

FileNet Document Publisher includes a comprehensive set of documentation to assist you as you set up and run Document Publisher Station and Document Publisher Server.

The Release Notes contain information about important features and late changes to FileNet Document Publisher. This document is available in the Documentation folder of your FileNet Document Publisher directory and in the root directory of your product disc. It can also be opened from the FileNet Document Publisher program group.

In addition to the Release Notes, the following PDF documents are available in the Documentation folder of both the installation directory and the product disc:

- Installation Guide
- Getting Started
- Seven Easy Lessons
- Tutorial

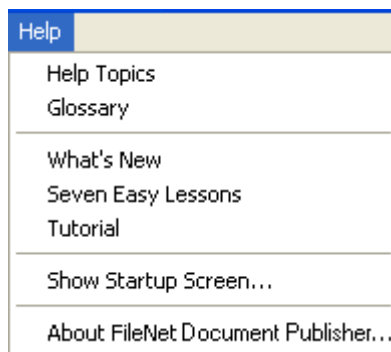
**Note:** The Seven Easy Lessons and the Tutorial are also available from the Startup Screen and Help menu in Document Publisher Station.

- Enabling Section 508 Compliance
- Creating a WML Project
- “Command Line Functionality”
- “TCPreview”

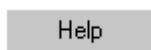
Finally, the FileNet Document Publisher User Guide is available as online Help from the Help menu in Document Publisher Station.

## Online assistance

The Help menu in Document Publisher Station provides direct access to the Help system and includes other useful links.



Most of the dialog boxes in Document Publisher Station also include a **Help** button that provides access to relevant information:



## CHAPTER 2

# Installing FileNet Document Publisher 7.5

When you install FileNet Document Publisher 7.5, you must choose to install Document Publisher Station, Document Publisher Server, or both. Document Publisher Scheduler is installed automatically, no matter which option you choose.

Typically, Document Publisher Station is installed on individual workstations and Document Publisher Server is installed on a dedicated server. However, you can install both on the same machine.

To install Document Publisher Station, you must also choose a repository: Content Manager and/or Content Services. Content Manager requires P8 Content Manager 3.5, and Content Services requires IDM Desktop 4.0.

**Note:** If you are using the Stored Search feature in Content Manager, your installation of P8 Content Manager 3.5 will require the P8AE-3.5.0-1007 patch.

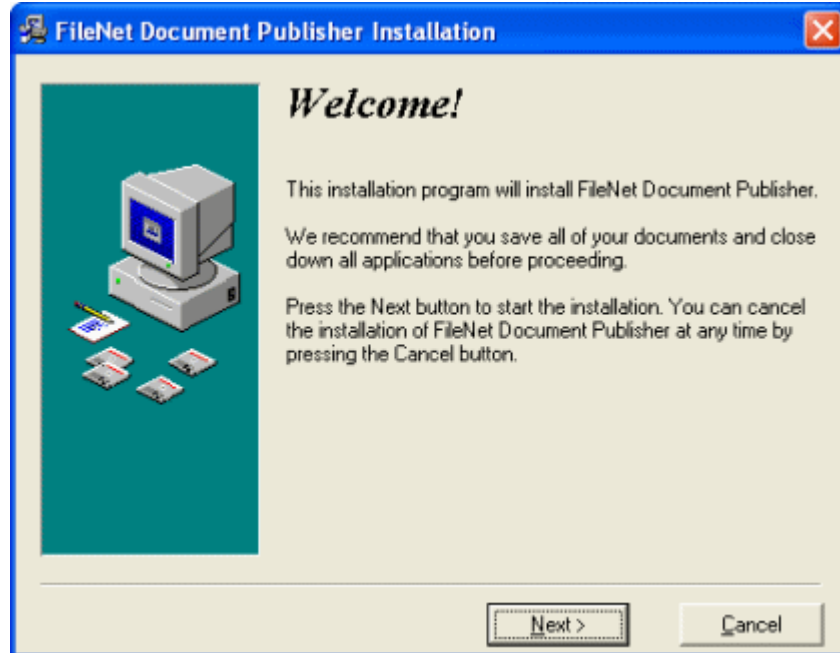
## Notes for upgrading from a previous version

1. Before installing FileNet Document Publisher 7.5, uninstall any previous version.
2. If you want to keep a customized version of your old default project file (Default.tcp) to use with version 7.5, either copy it to another directory or change its extension to keep it from being uninstalled or overwritten during the installation. You can then import the file into version 7.5. For more information, see “Importing the default project file (Default.tcp)” on page 28.

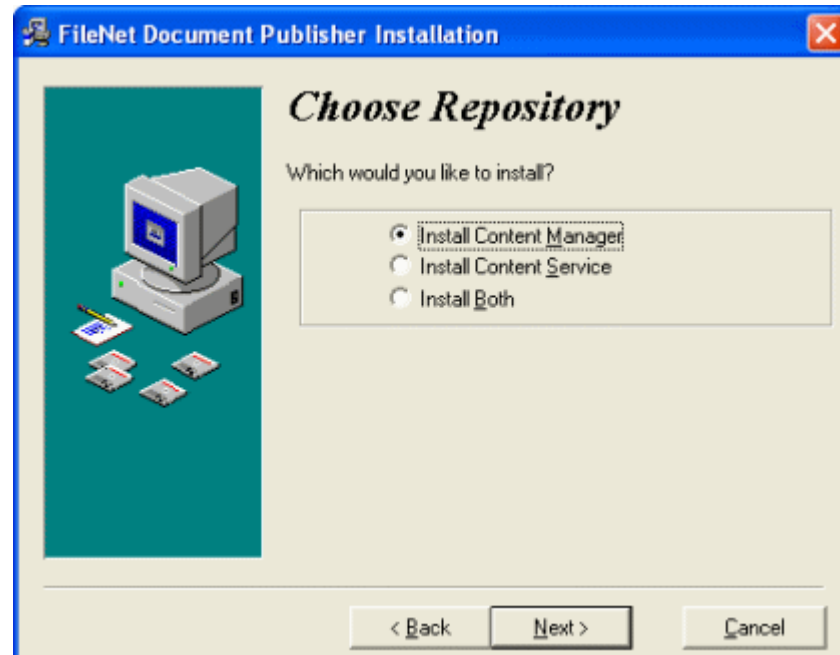
## Installing Document Publisher Station and Document Publisher Server

Follow these steps to install Document Publisher Station and/or Document Publisher Server:

1. Insert the FileNet Document Publisher product disc in your machine. The Installer opens, displaying the following Welcome screen (you may need to navigate to the appropriate drive and double-click the Setup icon):



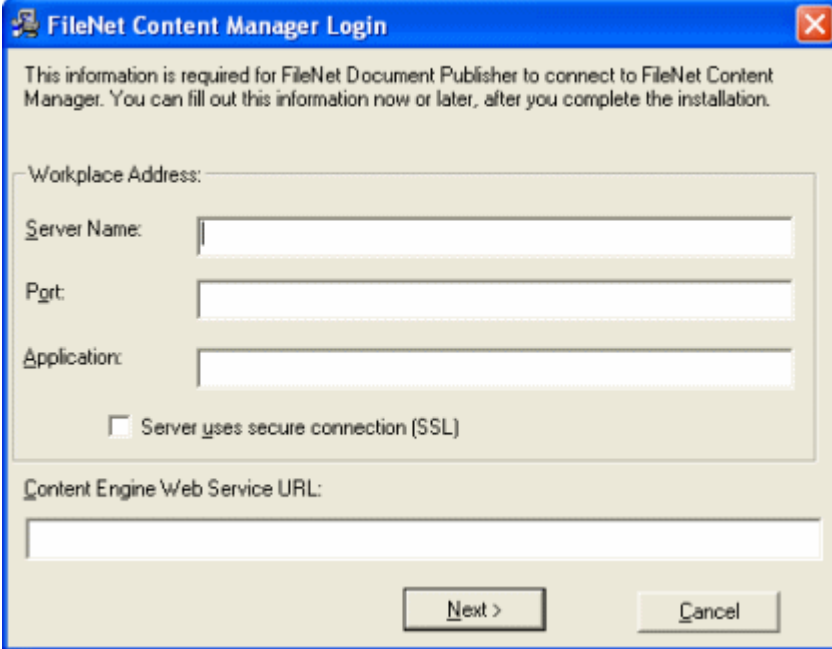
2. Click **Next** to continue to the Choose Repository screen:



Choose the repository you want to install:

- **Install Content Manager.** Requires P8 Content Manager 3.5.
  - **Install Content Services.** Requires IDM Desktop 4.0.
  - **Install Both.** Requires IDM Desktop 4.0 and P8 Content Manager 3.5.
3. Click **Next** to continue. If you are installing Content Manager, the following screen appears; otherwise, continue to step 4.



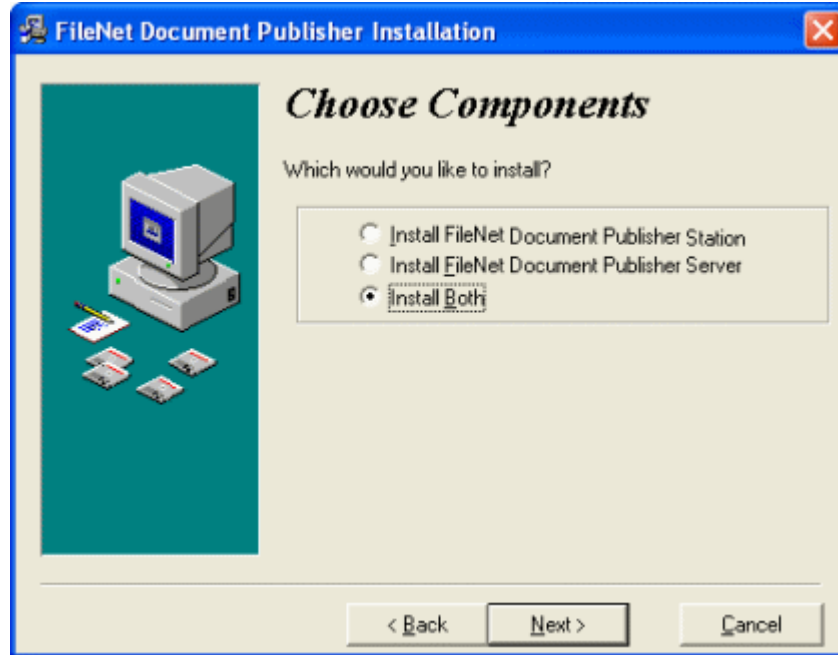


The image shows a Windows-style dialog box titled "FileNet Content Manager Login". The title bar is blue with a close button (X) on the right. The main area has a light beige background. At the top, there is a message: "This information is required for FileNet Document Publisher to connect to FileNet Content Manager. You can fill out this information now or later, after you complete the installation." Below this, there is a section labeled "Workplace Address:" which contains three text input fields: "Server Name:", "Port:", and "Application:". Below these fields is a checkbox labeled "Server uses secure connection (SSL)". At the bottom of the dialog, there is a section labeled "Content Engine Web Service URL:" with a single large text input field. At the very bottom, there are two buttons: "Next >" and "Cancel".

This information is required to access Content Manager, but is not required to complete the installation.

If you are not familiar with the details of your Workplace Address, see your system administrator. For the Content Engine Web Service URL, you need to run the WSI Configuration Utility. See "Enabling Content Engine Web Services" on page 23. From the example given there, you would be entering `http://localhost:6070/FNCEWS35SOAP` in the above field (having first replaced "localhost" with the appropriate information).

4. Click **Next** to view a description of the FileNet Document Publisher components, then click **Next** again to continue to the Choose Components screen:



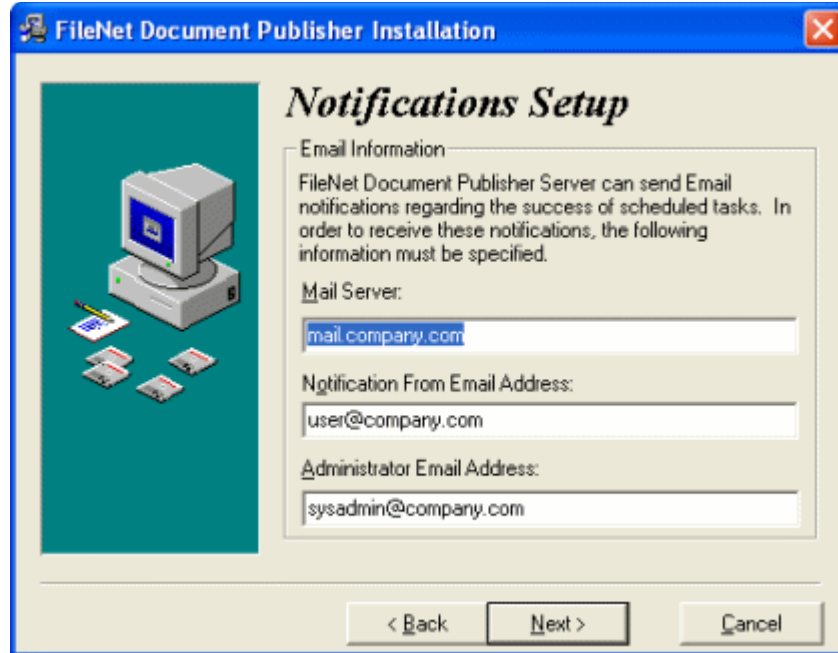
Choose the component(s) you want to install on this machine:

- **Install FileNet Document Publisher Station** — Choose this option if you do not plan to use Document Publisher Server, or if you intend to install Document Publisher Server on a different machine.
- **Install FileNet Document Publisher Server** — Choose this option if you intend to use this machine as a dedicated server.
- **Install Both** — Choose this option if you wish to use this machine as both a server and a workstation.

5. Click **Next** to open the Program Folder screen, then click **Next** to continue to the Destination Directory screen. We recommend that you keep the default settings for both the Program Folder and the Destination Directory locations.

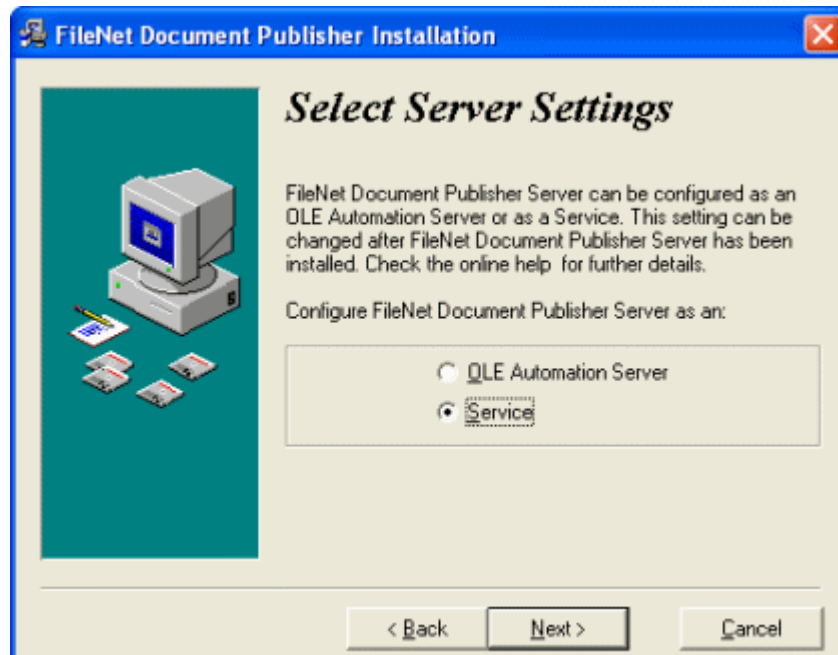
**Note:** If you are installing Document Publisher Server, continue to the next step. If you are installing Document Publisher Station only, go to step 8.

6. (Optional) — Fill out the server information on the Notifications Setup screen.



The Notifications Setup page gives you the option to set up email notification for scheduled tasks. This information is not required to install Document Publisher Server. You can enter or update the information at any time after installation. For additional information, see “Sending an Email Notification for a Task,” in Chapter 3 of *Getting Started*.

7. Click **Next** to continue to the Select Server Settings screen:

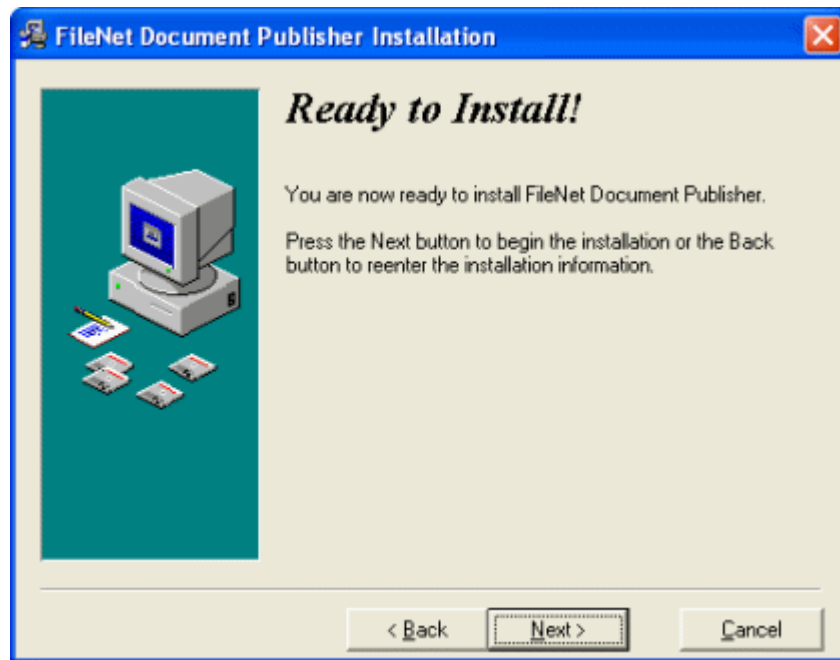


You must now decide whether to install Document Publisher Server as an OLE Automation Server or as a Service. From this screen you can choose one of the following options:

- **OLE Automation Server.** Select this option if you need to run the Server on older versions of Windows with the same setup (local or remote).
- **Service.** Most users select the Service option because it affords the most flexible setup. If you want the Server to run as a Service, be sure to read Chapter 3.

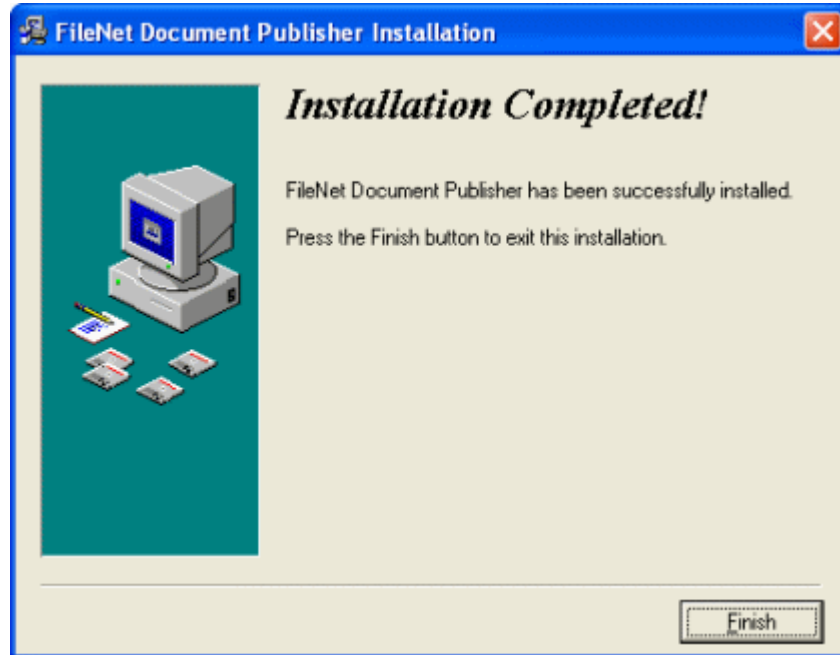
**Note:** You can change this setting after installation (for more information, see “Switching between OLE Automation Server and Service” on page 14).

8. Click **Next** to complete the installation:



**Note:** Content Manager requires Microsoft .NET 1.1 and Microsoft WSE 2.0 SP 3. If these programs are not already installed, you will be prompted to install them now. Microsoft requires that you read and accept their license agreements to continue the installation. We recommend that you keep all the default settings during .NET 1.1 and WSE 2.0 installation.

9. The following screen verifies that FileNet Document Publisher is installed. Click **Finish** to exit the Installer.



### After installation

You may have completed some of the following steps during installation. Check each step carefully to be sure that FileNet Document Publisher is fully configured.

1. On each machine on which you installed Document Publisher Server to run as a Service, complete the necessary additional configuration, as explained in "Setting up Document Publisher Server as a Service" on page 15.
2. On each machine on which you installed Document Publisher Station, import any project files or templates from a previous version that you want to convert for use with Document Publisher Station 7.5. See Chapter 4.

## Silently installing FileNet Document Publisher

You can install FileNet Document Publisher on a machine from a remote location on the network by means of a silent installation.

**Note:** The option to access the Content Manager repository is installed by default. Content Manager requires Microsoft .NET 1.1 and Microsoft WSE 2.0 SP 3. If these programs are not already installed, you can download them from Microsoft's Download Center:

<http://www.microsoft.com/downloads/search.aspx?displaylang=en>.

You must edit the setup.ini file, which is in the Support folder of your FileNet Document Publisher product disc. The setup.ini file contains all the instructions necessary to edit the file and run the silent installation. To edit the opening [FDP] section of setup.ini, follow the instructions provided in the [directions] section. The [requirements] section provides additional useful information. The closing [command line syntax] section explains how to run a silent installation once you have edited setup.ini.

## Switching between OLE Automation Server and Service

During installation you are prompted to configure Document Publisher Server as either an OLE Automation Server or as a Service.

Once you have installed Document Publisher Server, you can change your original configuration or unregister Document Publisher Server by typing one of the following command lines on the path (otherwise, the full path is required):

- To register Document Publisher Server as a Service:

```
TCServer -Service
```

**Note:** If you register Document Publisher Server as a Service, you must set up a user account (see “Setting up Document Publisher Server as a Service” on page 15).

- To register Document Publisher Server as an OLE Automation server set up to run as a remote server:

```
TCServer -Automation
```

- To unregister Document Publisher Server:

```
TCServer -Unregister
```

## CHAPTER 3

# Configuring FileNet Document Publisher Server

This chapter covers additional setup and configuration issues following the installation of FileNet Document Publisher Server.

## Setting up Document Publisher Server as a Service

To run Document Publisher Server as a Service, you must first create an account for a user, such as the network domain administrator, with full network access privileges. Once the user account is set up, Document Publisher Server can translate any project from any workstation on the network.

### Setting up a user account

When you set up a user account on Document Publisher Server, you can accept the default system account or specify your own user account.

The default system account grants full privileges to the Service machine but denies access to the network, which means that translations can only be run if all source documents and output web pages are placed on the local drive of the Windows machine that is running Document Publisher Server.

To ensure that Document Publisher Server works successfully with Document Publisher Scheduler to access files across the network, we recommend that you create a user account with full network access rights and privileges.

#### Specifying a user account and password in Windows 2000

1. On the Windows Start menu, click **Settings, Control Panel, Administrative Tools**, and then **Services**.
2. In the Services dialog box, right-click **FileNet Document Publisher Server**, and then click **Properties** on the popup menu to open the FileNet Document Publisher Server Properties dialog box.
3. On the General tab dialog, from the Startup Type drop-down list, select **Automatic**.
4. Click **Log On** to open that tab dialog.
5. Under Log On As, select **This Account** and specify an account to use.  
**Note:** Specify an account with complete network access so that Document Publisher Server can access all files specified by any task you run. If necessary, click the button to the right of the text box to select a user from the Add User list.
6. Enter a password, and then confirm it.

7. Click **OK** to return to the Services dialog box. The Startup Type column opposite FileNet Document Publisher Server now reads Automatic.
8. Right-click FileNet Document Publisher Server and click **Start** on the popup menu.

### Specifying a user account and password in Windows XP

1. On the Windows Start menu, click **Settings** and then **Control Panel**.
2. Click **Switch to Category View**.
3. Click **Performance and Maintenance**, double-click **Administrative Tools**, and then double-click the **Services** icon.
4. In the Services dialog box, right-click **FileNet Document Publisher Server**, and then click **Properties** on the popup menu to open the FileNet Document Publisher Server Properties dialog box.
5. On the General tab dialog, from the Startup Type drop-down list, select **Automatic** and then click **Log On** to open the tab dialog.
6. Under Log On As, select **This Account** and specify an account to use.

**Note:** Specify an account with complete network access so that Document Publisher Server can access all files specified by any task you run. If necessary, click the button to the right of the text box to select a user from the Add User list.

7. Enter a password, then click **OK** to return to the Services dialog box. The Startup column opposite Server now reads Automatic.
8. Click **Start the service** at the top left of the screen.
9. Right-click the Document Publisher Server entry and click **Start**.

Document Publisher Server is now set up as a Service and is running on the server. Users can access Document Publisher Server by running Document Publisher Scheduler from their workstations. Document Publisher Server, in turn, will automatically check every five seconds for scheduled tasks.


**Note:** Because Document Publisher Server can check the task list only while running, it is important to keep it running if users are scheduling overnight translations.

## Starting and stopping FileNet Document Publisher

The following sections explain how to start and stop Document Publisher Server and Document Publisher Scheduler.

### Starting and stopping Document Publisher Scheduler

You can start Document Publisher Scheduler directly from the Windows program group, or from within Document Publisher Station, as follows:

- Click **FileNet Document Publisher Scheduler**  on the standard toolbar, or
- Choose **FileNet Document Publisher Scheduler** from the Server menu.

If you have not yet established a connection between the Scheduler and the Server, click **Connect** from the Server menu and enter the server name in the Connect to



Server dialog box. For more information, see “Connecting Document Publisher Scheduler to Document Publisher Server” on page 17.

**Note:** You can also use the Pause Publishing command to temporarily halt translations. Document Publisher Server will continue to run and accept projects for translation, but it will not translate these projects until you “continue publishing.” Chapter 3 of *Getting Started* explains how to schedule tasks for translation by Document Publisher Server.

### Starting and stopping Document Publisher Server

You can start and stop Document Publisher Server, or pause publishing, at any time from the server:

1. Open the **Control Panel**.
2. Double-click the **FileNet Document Publisher Server** icon.
3. Select the Control tab.
  - Click **Start** to start the Server.
  - Click **Stop** to stop the Server.
  - Click **Pause Publishing** to temporarily stop publishing from the Server.
  - Click **Continue** to resume publishing if it is currently paused.

**Note:** If Document Publisher Server is running a task, it will not stop running until the task is completed.

## Connecting Document Publisher Scheduler to Document Publisher Server

You can use Document Publisher Scheduler to connect to Document Publisher Server from any workstation, once you know the name of the machine on which Document Publisher Server is installed. See “Connecting to FileNet Document Publisher Server,” in Chapter 3 of *Getting Started*.

**Note:** If you are connecting to Document Publisher Server from Document Publisher Scheduler for the first time and are not sure of the name of your local machine, right-click the Network Neighborhood icon and choose Properties from the menu. Click Identification to open that tab dialog. The Computer Name field displays the name of your machine. Users can also find this information by browsing the Network Neighborhood.

You may also need to run DCOM Configuration to enable DCOM, and also to set access and launch permissions for each user so that you can control the list of users allowed to launch the server.

To ensure that remote DCOM is installed and enabled on both the Document Publisher Scheduler and Document Publisher Server machines, you need to run DCOM Configuration on each machine to check the settings.

### On Windows XP

1. From the Start menu, click **Settings**, and then **Control Panel**.
2. Double-click **Administrative Tools**, and then double-click **Component Services**.

3. In the Computers folder of the console tree of the Component Services administrative tool, right-click the computer for which you want to enable DCOM, and then click **Properties**.
4. Click the **Default Properties** tab. Select the **Enable Distributed COM on this computer** check box.
5. Click **OK** to close the dialog box.

#### On Windows 2000

1. From the **Start** menu, click **Run**. In the Open text box type **dcomcnfg**, and click **OK** to open the Distributed COM Configuration Properties dialog box.

**Note:** If you have previously installed FileNet Document Publisher Station on the machine, a DCOM Configuration Warning dialog box may appear. Click **Yes** to record the Registry entries mentioned in the Warning.

2. In the Distributed COM Configuration Properties dialog box, click **Default Properties** to open that tab dialog. Select the **Enable Distributed COM on this computer** check box.
3. Click **OK** to close the dialog box.

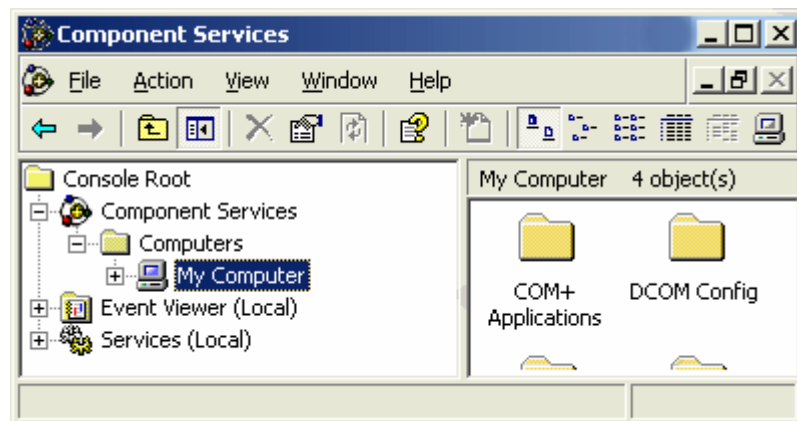
## Troubleshooting the connection between the Scheduler and Server on Windows XP SP2

If you are running Windows XP SP2, you may encounter one of the following errors while attempting to connect Document Publisher Scheduler to a dedicated Document Publisher Server machine.

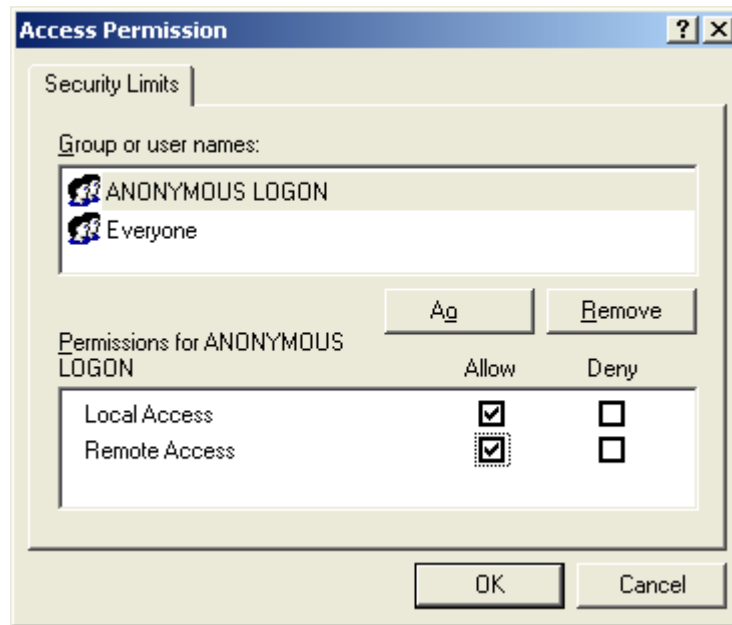
### “An error occurred while attempting to create the Advise connection from the Server back to the Scheduler”

If you get the above error message while attempting to connect to Document Publisher Server from Document Publisher Scheduler, complete the following steps on the machine on which Document Publisher Scheduler is running.

1. From the Windows Start menu, choose **Run**.
2. In the Open text box, enter **dcomcnfg**, and click **OK**.
3. In the Component Services window, right-click **My Computer** and choose **Properties** from the popup menu.



4. In the My Computer Properties dialog box, click the **COM Security** tab.
5. Under Access Permissions, click the **Edit Limits** button to open the Access Permission dialog box.

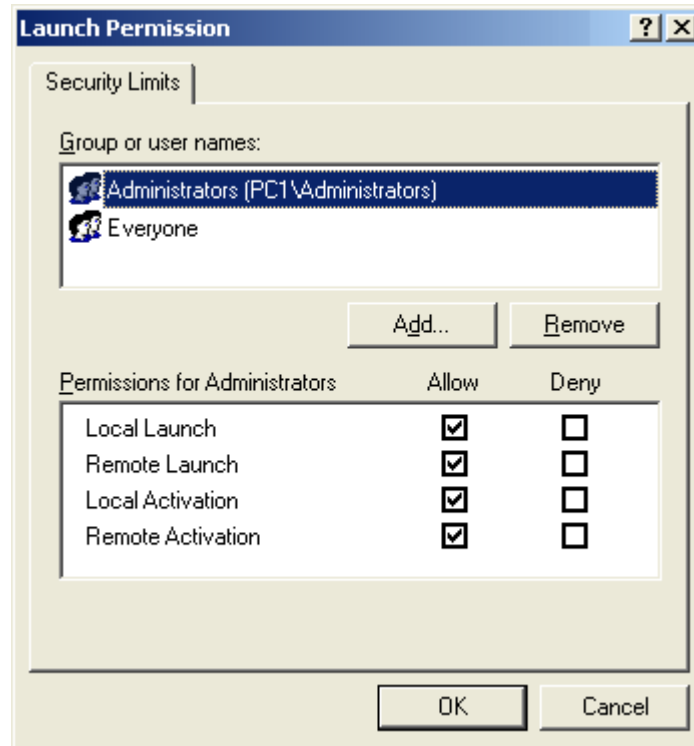


6. Select ANONYMOUS LOGON under Group Or User Names.
7. Under Permissions for ANONYMOUS LOGON, select **Remote Access** in the Allow column.
8. Click **OK** to close the dialog box.
9. In the My Computer Properties dialog box, click **Apply**.
10. Restart Document Publisher Scheduler and reattempt to connect to the Document Publisher Server computer.

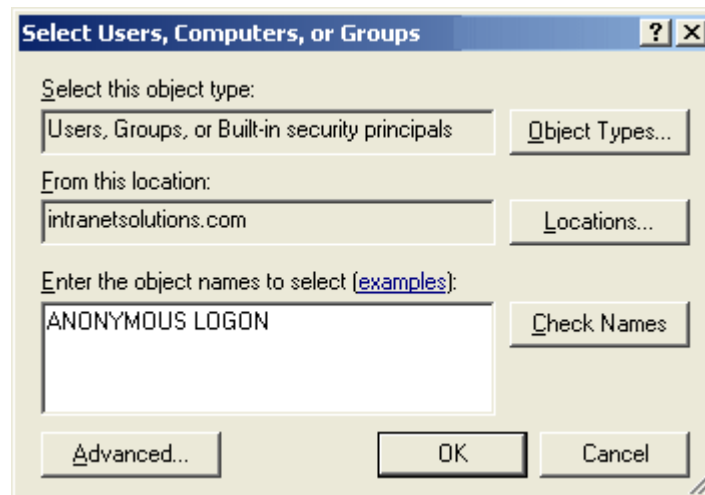
### “An error occurred while attempting to create the Admin object on the Server.”

Above is the text of another error message. Should this display when attempting to connect to an instance of Document Publisher Server from Document Publisher Scheduler, complete the following steps on the machine on which Document Publisher Server is running.

1. From the Windows Start menu, choose **Run**.
2. In the Open text box, enter **dcomcnfg**, and click **OK**.
3. In the **Component Services** window, right-click **My Computer** and choose **Properties** from the popup menu.
4. Under Launch and Activation Permissions, click the **Edit Limits** button to open the Launch Permission dialog box.



- Under Group Or User Name, click the **Add** button to open the Select Users, Computers, or Groups dialog box.



- Enter the object name by typing **ANONYMOUS USER** in the text box, then click **OK** to continue.
- In the Launch Permission dialog box, ensure that Remote Launch and Remote Activation are selected, and click **OK**.
- In the My Computer Properties dialog box, click **Apply**.
- Restart Document Publisher Scheduler and then re-attempt to connect to the Document Publisher Server machine.

For more information about what these changes do, visit <http://www.microsoft.com/technet/prodtechnol/winxp/nt/maintain/sp2netwk.msp#EIAA>.

## Registering a user name and password

Document Publisher Server needs access to a FileNet repository to obtain source documents and graphics and to run projects scheduled for translation. This requires configuring the Registry settings on the Server machine so that Document Publisher Server has the necessary credentials to log onto the FileNet repository.

System administrators can run **FCMPwCfg.exe** (for Content Manager) or **PswdCfg.exe** (for Content Services) at any time to change an encrypted password. Both FCMPwCfg.exe and PswdCfg.exe are available in the Support folder of the FileNet Document Publisher product disc.

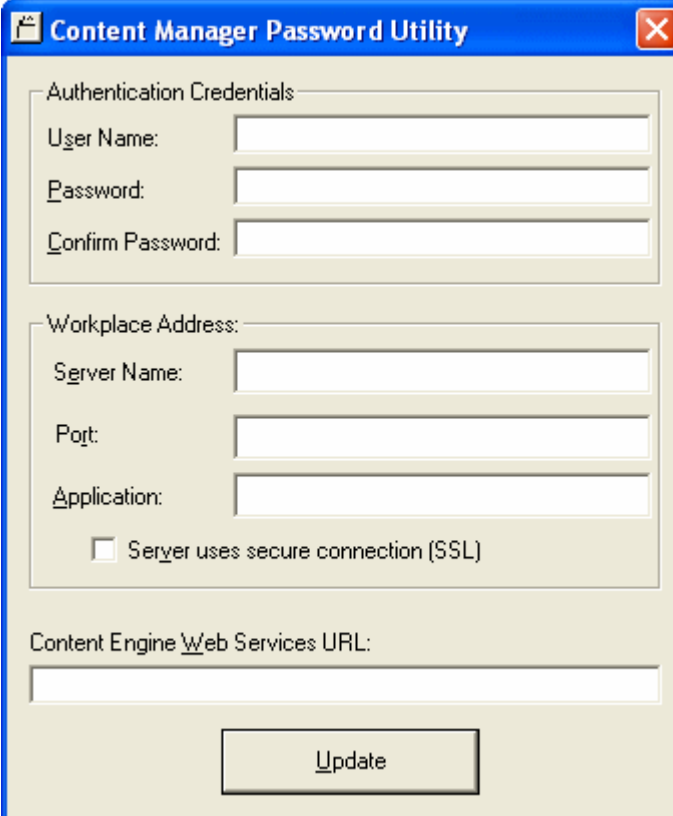
### Notes

1. If you are running Document Publisher Server as a Service, enter the credentials for a user account with full network access. See “Setting up a user account” on page 15
2. If you are running Document Publisher Server as an OLE Automation Server, the user who is logged onto the Server machine at translation time must provide his or her user name and password to connect to the FileNet repository.

### To encrypt a password for Content Manager

Repeat these steps for each machine on which Document Publisher Server resides:

1. Double-click **FCMPwCfg.exe** in the Support folder of your FileNet Document Publisher product disc to run the Content Manager Password Utility.



The screenshot shows the 'Content Manager Password Utility' dialog box. It has a blue title bar with a close button (X) in the top right corner. The dialog is divided into three main sections:

- Authentication Credentials:** This section contains three text input fields: 'User Name:', 'Password:', and 'Confirm Password:'.
- Workplace Address:** This section contains three text input fields: 'Server Name:', 'Port:', and 'Application:'. Below these fields is a checkbox labeled 'Server uses secure connection (SSL)'.
- Content Engine Web Services URL:** This section contains a single large text input field.

At the bottom center of the dialog is a button labeled 'Update'.

Provide the user name and password (twice). If you are not familiar with the details of your Workplace Address, see your system administrator. For the Content Engine Web Service URL, you need to run the WSI Configuration Utility. See “Enabling Content Engine Web Services” on page 23. From the example given there, you would be entering `http://localhost:6070/FNCEWS35SOAP` in the above field (having first replaced “localhost” with the appropriate information).

2. Click **Update**. The following dialog box confirms that the user name and encrypted password have been successfully registered:



3. Click **OK** to exit the Content Manager Password Utility.

### To encrypt a password for Content Services

Repeat these steps for each machine on which Document Publisher Server resides:

1. Double-click **PswdCfg.exe** in the Support folder of your FileNet Document Publisher product disc to run the Content Services Password Utility.



2. Provide the user name and password (twice), as required.
3. Click **Update**. The following dialog box confirms that the user name and encrypted password have been successfully registered:



## Enabling Content Engine Web Services

Content Engine Web Services (CEWS) is an industry standards–conformant Simple Object Access Protocol (SOAP) interface to the P8 Content Engine. CEWS allows applications executing on a variety of platforms and using a variety of languages and toolkits to access most of the functionality available through the Content Engine COM Application Programming Interface (API).

Although CEWS is installed by default when you install the Content Engine, it will not be operational until you enable it with the Web Services Integration (WSI) Configuration Utility. By default, both the HTTP and HTTPS transports are disabled. At least one transport must be enabled for Content Engine Web Services to run.

### To enable Content Engine Web Services to run on the HTTP transport

1. Run the WSI Configuration Utility, located at \Program Files\FileNet\Content Engine\WSIConfig.exe.
2. Click the **Enable** button in the HTTP Transport section. The utility will now display the **Transport Settings** dialog box.  
  
If you wish to change the default port number (6070) for the HTTP transport, replace the value in the **hts:port** field. Otherwise, do not change any of the fields in this dialog box.
3. Click **OK** (or **Cancel** if you do not want to make any changes) and then click **Close** to exit the utility.
4. Restart the Windows service named “Content Engine Object Store Service” for your changes to take effect.
5. To verify that Content Engine Web Services has been successfully enabled under HTTP, navigate to the following URL in your web browser (if you have changed the default port, substitute the new port number for “6070”):

```
http://localhost:6070/FNCEWS35SOAP/WSDL.
```

The contents of the FNCEWS35SOAP.wsdl file should now be displayed.

To disable Content Engine Web Services, select the **Disable** button in step 2.

To enable Content Engine Web Services to run on the HTTPS transport, see “Securing Content Engine Web Services” (next).

## Securing Content Engine Web Services

Because Content Engine Web Services requires plaintext credentials for a user name and password, FileNet recommends that you configure your Content Engine server to use Secure Sockets Layer (SSL) in order to protect this information. Once configured, Content Engine Web Services will then be able to send its XML SOAP messages using the secure HTTPS protocol. In order to set up your server to use SSL, you must perform the following steps:

1. Generate an SSL Certificate Request.
2. Submit the SSL Certificate Request to a Certificate Authority.
3. Install the SSL Certificate that you have received from the Certificate Authority.
4. Enable the HTTPS Transport.

You can use the **WSI Configuration Utility** to generate an SSL Certificate Request, install an SSL Certificate, and enable the HTTPS transport.

## Secure Sockets Layer (SSL)

SSL is a protocol that negotiates and employs the essential functions of mutual authentication, data encryption, and data integrity for secure web transactions and makes use of a public-and-private key encryption system. The HTTPS transport relies upon the SSL protocol. There are several versions, and the server can be configured as to which version(s) it will accept.

SSL v3 is always supported, and is the more secure version of the protocol. However, because some web services clients and browsers only support SSL v2, the server is configured to support both v2 and v3 by default. The “Support SSL version” option in the WSI Configuration Utility’s HTTPS transport settings allows this to be changed to SSL v3 only, if appropriate.

## Installing an SSL Certificate

In order to establish an SSL connection, the SSL protocol requires that a server have a digital SSL certificate installed. An SSL certificate binds an identity to a pair of electronic keys (public and private) that can be used to encrypt and sign digital information. This makes it possible to verify a party’s claim on a particular key, therefore preventing impersonation. In order to obtain a valid certificate that can be securely used for a web site or a web service, you must request an SSL certificate from a Certificate Authority (CA), such as VeriSign.

A CA is a trusted third party that establishes the identity of the people or organizations to whom it issues IDs. Once a CA has established your identity, it issues you a certificate that contains your organization’s public key, which the CA signs with its private key. An SSL certificate is tied to a particular computer, for use by a particular person or business, and is only valid for a particular time period (typically one or two years). SSL comes in two strengths, 40-bit and 128-bit, which refer to the length of the session key generated by every encrypted transaction. The longer the key, the more difficult the encryption code is to break.

## Generating an SSL Certificate Request

Before you can request an SSL certificate from a CA, you must first generate a valid Certificate Signing Request (CSR). A CSR is generated from your server and incorporates its unique “fingerprint”. It also includes your private/public key pair. The easiest way to generate a CSR is to use the WSI Configuration Utility.

### To generate a CSR

1. Run the WSI Configuration Utility, located at \Program Files\FileNet\Content Engine\WSIConfig.exe.
2. Click the **CreateRequest** button in the SSL Certificate section. The utility will now display the Certificate Request dialog.
3. Populate the following fields in the dialog:
  - **Country Name:** Select the country in which your organization is located.
  - **State or Province:** Select the state (if “United States” was selected in the **Country Name** field) or province (if “Canada” was selected) from the list box in which your organization is located. If any other country has been selected, you must type in a value for this field.
  - **Locality Name:** Enter the city in which your organization is located.



- **Organization Name:** Your company or organization's formal name. This name entered here must match the name found in official records.
  - **Organizational Unit Name:** Also known as department, division, or other similar term. Use this field to further identify the SSL certificate you are ordering, for example, by department or by physical server.
  - **Common Name (Server DNS Name):** Enter the fully qualified domain name (domain name and host name, if applicable) of the server that will use the SSL certificate. For example, www.yourcompany.com or dept.yourcompany.com.
  - **Encryption Password:** Enter a password.
  - **Verify Encryption Password:** Re-enter the encryption password.
4. When you are finished populating the above fields, click the **Make Certificate Request** button (or **Cancel** if you wish to start over).
  5. If the request is successful, the utility will display the following message: "You have successfully generated a Certificate Request file and a private key in the 'SysConfig' directory". Click **OK** to dismiss the message.
  6. Click the **View Request** button in the SSL Certificate section to verify that certificate request information is correct. If it is not, click the **Remove Request** button and start over.
  7. The following files should now exist in the \Program Files\FileNet\Content Engine\sysconfig directory:
    - server-key.pem (private key)
    - public.csr (certificate request)
    - server-pass.txt (encryption password)

## Submitting the Certificate Request to a Certificate Authority

After you have created a CSR, the next step is to submit it to a certificate authority. The following instructions show how to submit a CSR to VeriSign (the procedure for submitting to other Certificate Authorities is similar):

1. Navigate to the VeriSign web site (<http://www.verisign.com>) and select either a SecureSite (40-bit) or SecureSitePro (128-bit) SSL certificate to purchase.
2. Follow the instructions for purchasing a certificate until you get to the Enter Certificate Signing Request (CSR) page. Select Apache as your server platform.
3. Run the WSI Configuration Utility and click the **Copy Request** button. The utility will now display the **Copy Certificate Request** dialog.
4. Press Ctrl-C to copy the contents of the CSR, and press Ctrl-V to paste its contents into the paste box on the VeriSign web page. VeriSign validates the contents of the CSR file and displays the field information that you have previously entered.
5. When your request has been successfully processed (along with your payment), your certificate will be sent to you via e-mail or other delivery mechanism of your choosing within a few business days.

## Installing the Certificate

1. Once you have received your certificate, run the WSI Configuration Utility and click the **Install Certificate** button. The utility will now display the **Install Certificate** dialog.
2. The SSL certificate you receive from the CA will be a sequence of plain text, which looks similar to the following:

```
-----BEGIN CERTIFICATE-----
MIAGCSqGSIb3DQEHAqCAMIACAQExADALBgkqhkiG9w0BBwGggDCCAmowggHXAhAF
Ubm77e50M63v1Z2A/5O5MA0GCSqGSIb3DQEOBAUAMF8xCzAJBgNVBAYTA1VTMSAw
HgYDVQQKEXdSU0EgRGF0YSBTZW50eSwgSW5jLjEuMCwGA1UECxM1U2VjdXJl
IFNlcnZlcjBDZXJ0aWZpY2F0aW9uIEF1dGhvcm10eTAeFw0wMTA4MDIwMDAwMDBa
Fw0wMzA4MDIyMzU5NTl1aMIGQM0swCQYDVQQGEwJVUzERMA8GA1UECBMlY2Z1lu
aWExETAAPBgNVBACUCFJpY2htb25kMSAwHgYDVQQKFBdDYXZhbG1lcjBUZWxlcnZlcjBm
UsIEExMQZEcMBoGA1UECxQTTSW5mb3JtYXRpb24gU3lzdGVtczEbmMBkGA1UEAxQSc
Ym9uZGlucy5jYXZ0ZWwY29tMIGfMA0GCSqGSIb3DQEBAAQAA4GNADCBiQKBgQC8
x/1dxo2YnblilQLmpieziOqb7ArVfI1ymXo/MKcbKjnY2Axc45IelP3LHz+/N0Z/
M4N0Noa9eJpIIPRuVMTtoegtQ9TQuxqRqmrE6tECJja5g0hLRw1/WnHSxg6YbRRsF
xB0H9HShyf9bYmBJ8FYCu6HpWT7p5SVCfj5wjhGxnQIDAQABMA0GCSqGSIb3DQEB
BAUAA34AiwLwK76NzWNPn5Zwfdvpok8Nd3adgUL3yi0MUOb6Ws1EaddUKUqpNiNs
E+cFEpf0WForA+eRP6XraWw8rTN8102zGrcJgg4P6XVS4139+15aCEGGbauLP5W6
K99c42ku3Qr1X2+KeDi+xBG2cEIsdSiXeqS/16S36ITclu4AADEAAAAAAAA
-----END CERTIFICATE-----
```

3. Copy and paste the contents of the certificate you received from VeriSign into the text box of the **Install Certificate** dialog box.
4. Click the **Install Certificate** button. The utility will display the following message: "The Certificate has been installed - it has been copied to \Program Files\FileNet\Content Engine\sysconfig\server-cert.pem". Click **OK** to dismiss the message.

## Enabling the HTTPS transport

To enable Content Engine Web Services to run on the HTTPS transport, follow these instructions (you must first have successfully installed an SSL certificate):

1. Run the WSI Configuration Utility. "Installed" should be displayed in the SSL Certificate section of the utility. If it is not, you must install an SSL certificate before proceeding.
2. Click the **Enable** button in the HTTPS Transport section. The utility will now display the HTTPS Transport Settings dialog box.
3. If you wish to change the default port number (6075) for the HTTPS transport, replace the value in the **hts:port** field. Otherwise, do not change any of the fields in this dialog box.
4. In the **Supported SSL Version** field, verify the SSL version: SSL v2 and v3 or SSL v3 only. SSL v2 and v3 is the default and should only be changed if you are certain that your browser or web services client does not require SSL v2. See the "SSL" section at the beginning of this topic for more information.
5. Click **OK** (or **Cancel**, if you do not want to make any changes) and then click **Close** to exit the utility.
6. Restart the Windows service named "Content Engine Object Store Service" for your changes to take effect.

To verify that Content Engine Web Services has been successfully enabled under HTTP, navigate to the following URL in your web browser:

<https://localhost:6075/FNCEWS35SOAP/WSDL>.

If you have changed the default port, substitute the new port number for “6075”. The contents of the FNCEWS35SOAP.wsdl file should now be displayed.

## CHAPTER 4

# Migrating from a Previous Version

Any project file created in a previous version of FileNet Document Publisher Station can be run in version 7.5. However, once the project file is saved in the 7.5 format it can no longer be run in an earlier version.

## Importing project files from a previous version

You can import any project file, including a customized copy of the default project file Default.tcp, from a previous version into FileNet Document Publisher 7.5. FileNet Document Publisher will, if necessary, convert the project file to the 7.5 format.

For detailed steps, see “Importing project files from a previous version” in FileNet Document Publisher Help.

## Importing the default project file (Default.tcp)

If you customized and preserved a copy of the default project file from a previous version of FileNet Document Publisher, you can convert it to version 7.5 like any other project file:

1. Close Document Publisher Station if it is currently open.
2. Copy the old default project file into the `..\Resources\en` folder of your FileNet Document Publisher directory (if necessary, change the extension back to `.tcp`). This will overwrite the version 7.5 default project file (see note below).
3. Open Document Publisher Station.
4. Click **Save**.


**Note:** A copy of Default.tcp is available in the Support folder on the product disc.

## Editing the default project file (Default.tcp)

You may want to edit the default project file, for example, to import some templates that you created in a previous version for a particular project so that these are available each time you start a new project in Document Publisher Station 7.5.

If you customized Default.tcp for a previous version of Document Publisher Station, you already know how to edit this file. If not, the following instructions will walk you through the process.

**Note:** Before customizing the default project file, we suggest that you create a backup file, Default.bak.

1. Start Document Publisher Station. A copy of Default.tcp opens by default (the title bar simply reads `<Unsaved>`, while the root publication in the Publication Hierarchy pane is “Unnamed”).
2. Click **Manage Templates**  on the toolbar.

3. In the Manage Templates dialog box, click the **Import** button to open the Template Import dialog box.
4. Locate the folder containing the template file you want to import. Select the file and click **Open**.
5. Your template is now listed in the Manage Templates dialog box (as an internal template).
6. Click **OK** to return to the main window.
7. Click **Save As** to open the Save As dialog box. Locate and select Default.tcp in the FileNet Document Publisher directory.
8. Click **Save**.

Whenever you import a template, Document Publisher Station recognizes the underlying template name (as listed in the Manage Templates dialog box). If you rename a template as you export it, and then try to import it into another project, you will receive an error message if the second project has a template with the same name as the original, underlying name of the template you exported.

If you want to change the name of a template, you should do so in the Manage Templates dialog box, before you export it.

Whenever you edit the default project file, the changes take effect immediately. You can even overwrite the default template settings by adding some source documents, making changes to the template, and then deleting the source documents before saving the project file as Default.tcp.

## Importing templates from a previous version

You can use a template from an older version of Document Publisher Station in version 7.5 in one of three ways:

- Import the template as part of a project file from a previous version that you convert to the 7.5 format
- Import the template as a standalone file directly into any Document Publisher Station 7.5 project file (including the default project file, Default.tcp)
- Link to the standalone template file, assuming it is accessible on your network

Templates imported as part of an older project will be available only for the projects of which they are a part, unless you formally export them and then import them into any new version 7.5 project you create (or link your projects to the external, standalone file). If you want such a template to be available for *all* new projects in Document Publisher Station 7.5, you should import the template into the default project file (see below).

You can view all the templates that ship with version 7.5 in the Manage Templates dialog box. The templates listed are “internal.” You can also have “external,” or “linked,” templates. You create a linked template by linking to a standalone (external) template file on your file system (using the Link button in the Manage Templates dialog box). You can use a linked template to format your web pages just as you would an internal template. However, you must import the standalone template into a 7.5 project in order to edit it.

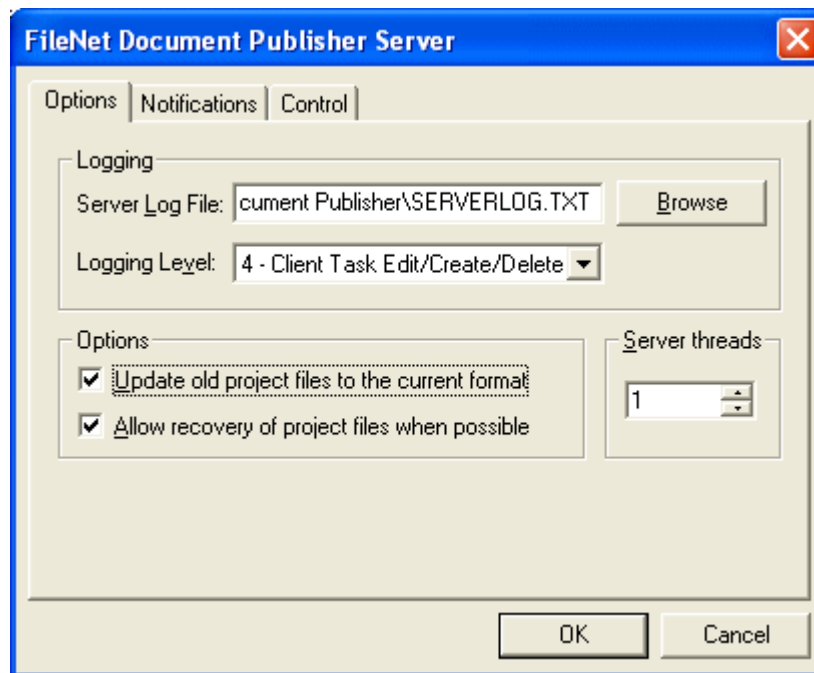
**Note:** Templates and their default settings are described in Appendix B of *Getting Started*.

## Converting projects in Document Publisher Server

Like Document Publisher Station, Document Publisher Server will not translate projects created in an earlier version. If you plan to schedule such projects for translation on Document Publisher Server, you have two options:

- Open the old project files in Document Publisher Station and save them in the new 7.5 format, as explained above, and then schedule them for translation by Document Publisher Server.
- Change a setting in the FileNet Document Publisher Properties dialog box so that the Server will automatically convert all scheduled projects to the 7.5 format before translating them. Since Document Publisher Server simply converts the existing file to the 7.5 format (and does not preserve a copy of the older version), this switch is off by default.

If you installed Document Publisher Server as an OLE Automation Server and Document Publisher Server is running, right-click the FileNet Document Publisher Server icon on the taskbar and choose **Properties**. The Properties dialog box opens, as shown in Figure 4-1. Then select **Update old project files to the current format**.



**Figure 4-1** By selecting **Update old project files to the current format**, under Options, older project files will be automatically updated by Document Publisher Server to the 7.5 format and will be translated at the scheduled time. A copy of the old project file will not be retained.

If you are running Document Publisher Server as a Service, the same option is available by opening the Control Panel and clicking the FileNet Document Publisher Server icon.

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