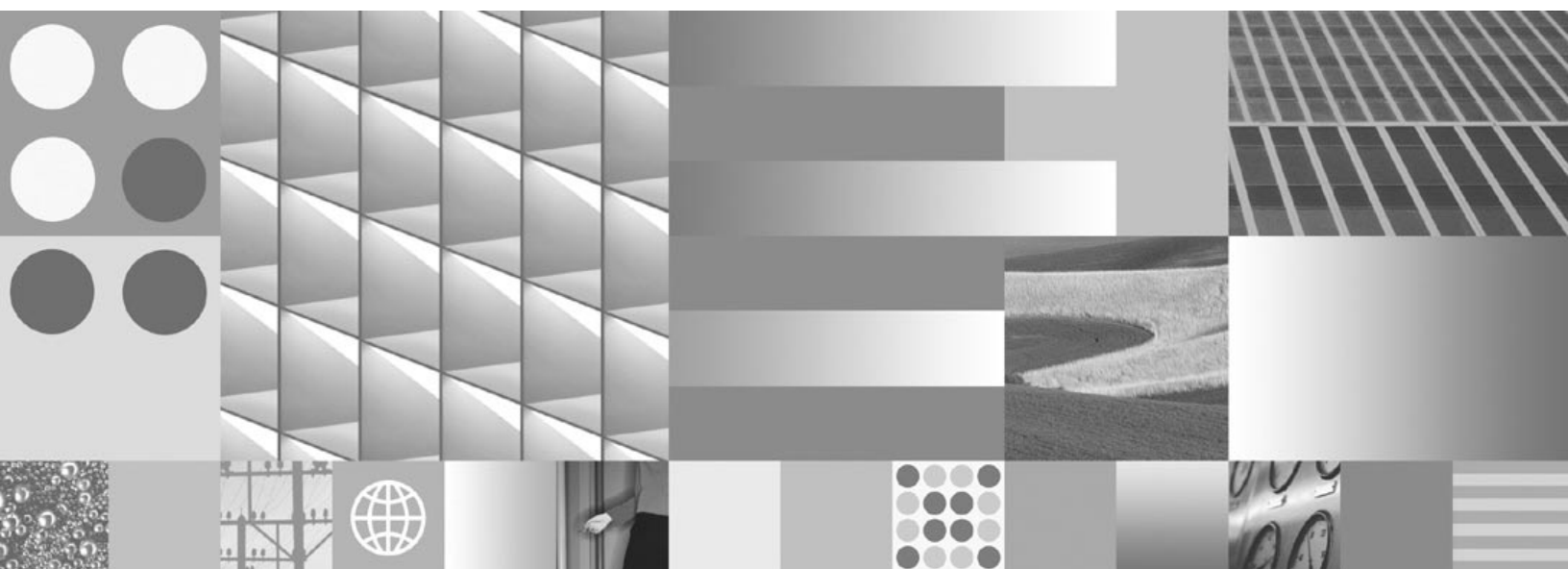


GC31-5527-00



Installation and Upgrade Guide

Note

Before using this information and the product it supports, read the information in “Notices” on page 23.

This edition applies to version 2.1.0.0 of IBM FileNet Connector for SharePoint Document Libraries (product number 5724-R96) and to all subsequent releases and modifications until otherwise indicated in new editions.

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Typographical Conventions

This document uses the conventions in the following table to distinguish elements of text.

Convention	Usage
UPPERCASE	Environment variables, status codes, utility names.
Bold	Program names and selected terms such as command parameters or environment variables that require emphasis.
Bold Gray	Clickable user-interface elements (such as buttons).
Bold Olive	Paths and file names.
<i>Italic</i>	User-supplied variables and new terms introduced in text, names of additional documents (such as <i>IBM FileNet® P8 Platform Installation and Upgrade Guide</i>).
<i><italic></i>	User-supplied variables that replace everything between and including the angle bracket delimiters (< and >).
Monospace	Code samples, examples, display text, and error messages.

NOTE Some path names in this document that are identical (except for the directory-separator character) on both UNIX® and Windows® platforms are specified in UNIX syntax only (that is, with forward-slash directory separators).

WARNING This document contains examples of text to be typed on a command line. Be sure to manually type the command, rather than copying and pasting it from this document. Otherwise, your command line may contain unrecognized characters and will not execute properly.

Revision Log

The following table identifies changes made to this document.

Date	Revision
11/07	Initial revision of this guide.

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About this Document

Installation by a FileNet Certified Professional (FCP) recommended. For more information on the FCP program, contact your IBM service representative.

Every effort has been made to provide you with complete installation instructions. If information becomes available after the documentation release from which you accessed this guide, we will provide an updated version of the guide on the Information Management support page (www.ibm.com/software/data/support/). As a general rule, you should refer to the web site to obtain the current version of this guide.

Send your comments by e-mail to comments@us.ibm.com. Be sure to include the name of the product, the version number of the product, and the name and part number of the book (if applicable). If you are commenting on specific text, include the location of the text (for example, a chapter and section title, a table number, a page number, or a help topic title).

NOTES

- Because of the recent IBM purchase of FileNet Corporation, the web-site locations for FileNet product information, documentation, software updates, etc. are in a period of transition. Links in this guide, therefore, could redirect you to new, potentially unfamiliar locations. We apologize for any resulting inconvenience.
- This guide provides instructions for installing and/or upgrading IBM FileNet Connector for SharePoint Document Libraries software. Be aware that each release of an IBM FileNet P8 component or expansion product can have multiple software updates available in the form of service packs, fix packs, and/or interim fixes, each with potentially different dependencies and installation requirements. Therefore, before you install or upgrade IBM FileNet Connector for SharePoint Document Libraries, review the list of releases and their associated dependencies in the *IBM FileNet Compatibility Matrix* on the Information Management support page (www.ibm.com/software/data/support/). See "Access IBM FileNet Documentation, Compatibility Matrices, and Fix Packs" on page 8.
- The ideal way to use this guide is as an online PDF installed within the help system. This guide contains links to the IBM FileNet P8 online help system, where you will find important additional information that can help you make decisions about your installation. To take advantage of these links while using this guide, perform the documentation install task ("[Install the Documentation on the Application Server](#)" on page 13) before beginning your IBM FileNet Connector for SharePoint Document Libraries installation.

Access IBM FileNet Documentation, Compatibility Matrices, and Fix Packs

To access documentation for IBM FileNet products

1. Navigate to the Information Management support page (www.ibm.com/software/data/support/).
2. Select the appropriate IBM FileNet product from the "Select a category" list.

3. From the Product Support page, under Learn, click Product documentation.
4. From the Product Documentation page:
 - a. If necessary, click the Doc. Link for the appropriate component product to display the document list.
 - b. Click the icon in the appropriate release column to access the document you need.

NOTE For a complete list of direct links to documentation relevant to this guide, see “[General Requirements](#)” on page 10.

To access compatibility matrices and fix packs for IBM FileNet products

1. Navigate to the Information Management support page (www.ibm.com/software/data/support/).
2. Select the appropriate IBM FileNet product from the "Select a category" list.
3. From the Product Support page, under Download, click Fix Packs by version.
4. From the Fix Pack page:
 - a. Click Matrix to access the compatibility matrix.
 - b. Click the release number to access the fix pack you need.

Installation Planning Considerations and Prerequisites

This section lists details that will help you prepare your environment for the installation of the IBM FileNet Connector for SharePoint Document Libraries software. Review this section thoroughly before you set up IBM FileNet P8 integration components or required third-party software.

General Requirements

- **Gather auxiliary documentation.**

NOTE To download this and other IBM FileNet product documentation from the IBM web site, see [“Access IBM FileNet Documentation, Compatibility Matrices, and Fix Packs” on page 8.](#)

- [IBM FileNet P8 Hardware and Software Requirements](#). This document provides details for all IBM FileNet P8 system components, as well as the minimum supported levels of third-party software components. The information throughout the *IBM FileNet Connector for SharePoint Document Libraries Installation and Upgrade Guide* assumes you have met all applicable requirements listed in that document.
- [IBM FileNet P8 Release Notes](#). This document provides details on new features, known issues, and resolved problems.
- [IBM FileNet P8 Platform Installing Non-English Environments Technical Notice](#). This document will help you set up the product if your environment is not English-language based.
- [IBM FileNet P8 Platform High Availability Technical Notice](#). This document provides details on how to set up your IBM FileNet P8 system using clusters, farms, and other high-availability software and hardware.
- [IBM FileNet P8 Platform Troubleshooting Guide](#). This document provides troubleshooting information on all aspects of the product.
- The following are minimum general requirements for installing and configuring IBM FileNet Connector for SharePoint Document Libraries:
 - IBM FileNet P8 Platform installation, including at the least the following components:
 - Content Engine.
 - Microsoft Web Service Enhancements runtime is required for all clients using the Content Engine .NET API.
 - IBM FileNet P8 documentation server
 - Microsoft Office SharePoint Server or Microsoft Windows SharePoint Services.
 - Microsoft SQL Server.

Operating System Requirements

The following software is installed automatically, in the locations noted, as part of IBM FileNet Connector for SharePoint Document Libraries.

- UFI engine - **<install_path>\ufi_4.0.1.**
- Content Engine .NET API - **<install_path>\Content Engine .NET API 4.0.0.**

Database Considerations

- The IBM FileNet Connector for SharePoint Document Libraries software requires a Microsoft SQL Server database regardless of the database type used by the associated IBM FileNet P8 Platform software.
- The software must have its own unique database instance from Content Engine and SharePoint but can share a database engine.
- The database for IBM FileNet Connector for SharePoint Document Libraries can be local or remote from the SharePoint server on which you install the IBM software.

Security Requirements

- To configure IBM FileNet Connector for SharePoint Document Libraries, you will need the following user accounts.

Account	Description
Local administrator on SharePoint server	Used to install IBM FileNet Connector for SharePoint Document Libraries on the SharePoint server.
SharePoint site administrator	Specified as the account under which the IBM FileNet Connector for SharePoint Document Libraries connector service will run. This must be an Active Directory LDAP user account who has full rights to the SharePoint site, including the ability to add, modify and delete content. Also used to configure the SharePoint processing settings in the UFI Configuration Manager.
SQL Server database administrator	Used to create the database and data store for IBM FileNet Connector for SharePoint Document Libraries. This user must have DB Creator privileges.
Content Engine object store connection processing user	Used to configure the SharePoint processing settings in the Content Engine.

Installation Tasks

To install and configure IBM FileNet Connector for SharePoint Document Libraries

1. Refresh the documentation on the application server ([Task 1 on page 13](#)).
2. Install and configure IBM FileNet Connector for SharePoint Document Libraries ([Task 2 on page 14](#)).

Task 1: Install the Documentation on the Application Server

NOTE Before you install IBM FileNet Connector for SharePoint Document Libraries, ensure that the latest 4.0 version of the IBM FileNet P8 Platform documentation is installed on your IBM FileNet P8 documentation server. See *IBM FileNet P8 Platform Installation and Upgrade Guide* for instructions. To download this guide from the IBM support page, see [“Access IBM FileNet Documentation, Compatibility Matrices, and Fix Packs” on page 8](#).

To install IBM FileNet Connector for SharePoint Document Libraries documentation

Because IBM FileNet Connector for SharePoint Document Libraries is an expansion product for IBM FileNet P8 Platform, you must add the associated documentation to an existing installation of the IBM FileNet P8 Platform Help. This action makes IBM FileNet Connector for SharePoint Document Libraries help available to your users and enables context-sensitive help from the product user interface.

For details and instructions on installing expansion product documentation, see the latest 4.0 version of the *IBM FileNet P8 Platform Installation and Upgrade Guide* as noted above. Pay special attention to the “Install Expansion Product Documentation” subtopic in the task “Install IBM FileNet P8 Platform Documentation (<your application server>).”

Task 2: Install IBM FileNet Connector for SharePoint Document Libraries

This task describes how to install the IBM FileNet Connector for SharePoint Document Libraries software interactively or silently, and then describes how to configure the associated UFI Configuration Manager which is used to create the initial data store for the required Microsoft SQL Server database.

Before you begin the procedures in this topic, ensure all prerequisites are completed. For details, see [“Installation Planning Considerations and Prerequisites” on page 10](#).

NOTE The installer will check your system for (and silently install, if necessary) a current version of the Content Engine .NET API.

Interactively Install IBM FileNet Connector for SharePoint Document Libraries

This topic describes how to install IBM FileNet Connector for SharePoint Document Libraries interactively by running the standard installation program and manually working through the prompts. To run the installer silently, see [“Silently Install IBM FileNet Connector for SharePoint Document Libraries” on page 15](#).

To interactively install IBM FileNet Connector for SharePoint Document Libraries

1. Log on to the SharePoint machine using an account that has local administrator privileges.
2. Launch **IBMFileNet_DocLibConnector_2.1.exe**.
3. Complete the IBM FileNet Connector for SharePoint Document Libraries setup wizard screens as follows:

In this screen...	Perform this action...
Introduction	Read the introductory instructions about how to navigate through the installer screens.
Software License Agreement	Review the software license agreement and click the option to accept it to proceed with the installation. Click Print to print a hardcopy of the agreement.

In this screen...	Perform this action...
Choose Install Folder	<p>Specify a directory path in which to install the software, as follows:</p> <ul style="list-style-type: none"> To accept the default installation path, click Next. To navigate to a different installation path, click Choose and complete the Select a Folder dialog box. <p>NOTE Underlying UFI engine software and Content Engine .NET API software are automatically installed to a hard-coded directory in your install path. For details, see “Operating System Requirements” on page 11.</p>
Pre-Installation Summary	<p>Review the pre-installation information summary and click Install.</p> <p>CAUTION Once the installation process begins, the operation cannot be cancelled.</p>
Install Complete	<p>Review the installation summary.</p> <p>If there were errors during installation, a dialog will appear that indicates errors during install. For details, see the installation log located in the following location:</p> <p>C:\Program Files\IBM\FileNetConnectorForSharePointDocumentLibraries\IBM_FileNet_Connector_for_SharePoint_Document_Libraries_InstallLog.log</p> <p>Click Done to exit the installer.</p>

Silently Install IBM FileNet Connector for SharePoint Document Libraries

This topic describes how to silently install the IBM FileNet Connector for SharePoint Document Libraries.

To run a silent install, you must create a response file that contains the options to pass to the installer. A sample response file is included with the IBM FileNet Connector for SharePoint Document Libraries installer.

To silently install IBM FileNet Connector for SharePoint Document Libraries

1. Log on to the SharePoint machine using an account that has local administrator privileges.
2. From the IBM FileNet Connector for SharePoint Document Libraries software package, open the **silent_installer.properties** file in a text editor and enter the appropriate responses by following the directions in the file.

3. Open a command line and run the following command from the appropriate directory:

```
IBMFileNet_DocLibConnector_2.1.exe -i silent -f silent_installer.properties
```

Specify the Service Account for IBM FileNet Connector for SharePoint Document Libraries

The procedure in this topic describes how to designate an account under which the service for the IBM FileNet Connector for SharePoint Document Libraries will run.

To specify the service account for IBM FileNet Connector for SharePoint Document Libraries

1. Access the Windows Services Administration tool.
2. Right-click **FileNet SharePoint Connector Service** and click **Properties**.
3. Click the **Log On** tab.
4. Under *Log on as*, select *This account*, and specify the user name and password for the account you want to use.
5. Click **OK**.
6. Start the UFI Task Routing Engine service. When this service starts, it also automatically starts the following services:
 - FileNet SharePoint Connector Service
 - UFI FileNet P8 Content Engine 4.0 Connector
 - UFI Retention Service

NOTE Unless you change the default startup type from Manual to Automatic, you will have to restart the UFI Task Routing Engine service each time you restart the server.

Create Required Database and Data Store

This topic covers configuration of the UFI Configuration Manager that you use to create the data store for the Microsoft SQL Server database required to run IBM FileNet Connector for SharePoint Document Libraries. At the end of the procedure, you will be directed to the associated administrative help for follow-on instructions.

To add the required database and data store

1. Add a new Microsoft SQL Server database for IBM FileNet Connector for SharePoint Document Libraries.
2. Run the database scripts located in **C:\Program Files\IBM\UFI_4.0.1\Database Scripts\ldb_ufi_400_sql.sql** against the database you just created.
3. Launch UFI Configuration Manager and create a new data store.
 - a. Click the Create New Data Store icon.

- b. Enter a name for the new data store.
- c. Select the *Make this my active data store* option.
- d. Enter the machine name on which this data store is located in the Database Server field.
- e. Enter your SQL Login name and password and click **Retrieve Databases**.
- f. Select the database you just created from the Database drop-down menu.
- g. Click the Save icon.

For further details on how to use the UFI Configuration Manager, see IBM FileNet P8 Help topic [Expansion Products > IBM FileNet Connector for SharePoint > IBM FileNet Connector for SharePoint Document Libraries](#).

Remove Software

This section includes:

- [“Interactively Uninstall IBM FileNet Connector for SharePoint Document Libraries” on page 19](#)
- [“Silently Uninstall IBM FileNet Connector for SharePoint Document Libraries” on page 20](#)

Uninstall IBM FileNet Connector for SharePoint Document Libraries

This task describes how to uninstall the IBM FileNet Connector for SharePoint Document Libraries software interactively or silently.

NOTES

- The uninstall program does not remove the associated <UFI> directories, because they contain software that can be shared with other IBM FileNet integration products. You can remove these directories manually if you are sure no other products are installed that require them (for example, IBM FileNet Email Manager or Records Crawler).
- You must uninstall IBM FileNet Connector for SharePoint Web Parts in the same manner that it was installed. If the software was installed silently, then you must uninstall silently. If the software was installed interactively, then you must uninstall interactively.

Interactively Uninstall IBM FileNet Connector for SharePoint Document Libraries

The procedure in this topic describes how to interactively uninstall the software using the Add or Remove Programs Control Panel.

To uninstall IBM FileNet Connector for SharePoint Document Libraries

1. Stop the UFI Task Routing Engine service. When this service stops, it also automatically stops the following services:
 - FileNet SharePoint Connector Service
 - UFI FileNet P8 Content Engine 4.0 Connector
 - UFI Retention Service

CAUTION Ensure the four services are stopped before proceeding with the uninstall.

2. From the Windows Control Panel, select Add or Remove Programs.
3. Select **IBM FileNet Connector for SharePoint Document Libraries**.

NOTE The IBM FileNet Connector for SharePoint Document Libraries installer adds four components during installation. When you uninstall IBM FileNet Connector for SharePoint Document Libraries, all four components will be removed.

- Connector GAC Install.
 - FileNet UFI.
 - IBM FileNet Connector for SharePoint Document Libraries.
4. Click **Change/Remove**. The Introduction screen of the Uninstall IBM FileNet Connector for SharePoint Document Libraries program opens.
 5. Click **Uninstall** to proceed with the uninstall operation.

6. Click **Done** once the uninstall completes.
7. Delete the Microsoft SQL Server database that was created during installation of the IBM FileNet Connector for SharePoint Document Libraries. For details, see [“Create Required Database and Data Store” on page 16](#).

Silently Uninstall IBM FileNet Connector for SharePoint Document Libraries

The procedure in this topic describes how to silently uninstall the software.

To silently uninstall IBM FileNet Connector for SharePoint Document Libraries

1. Stop the UFI Task Routing Engine service. When this service stops, it also automatically stops the following services:
 - FileNet SharePoint Connector Service
 - UFI FileNet P8 Content Engine 4.0 Connector
 - UFI Retention Service

CAUTION Ensure the four services are stopped before proceeding with the uninstall.

2. Log on to the SharePoint machine using an account that has local administrator privileges.
3. Open a command prompt and navigate to the **Uninstall IBM FileNet Connector for SharePoint Document Libraries** subdirectory in the installation location (default location is **C:\Program Files\IBM\FileNetConnectorForSharePointDocumentLibraries\Uninstall IBM FileNet Connector for SharePoint Document Libraries**).
4. Execute the following command:

```
"Uninstall IBM FileNet Connector for SharePoint Document Libraries.exe" -i silent
```

The IBM FileNet Connector for SharePoint Document Libraries will silently uninstall.

5. Delete the Microsoft SQL Server database that was created during installation of the IBM FileNet Connector for SharePoint Document Libraries. For details, see [“Create Required Database and Data Store” on page 16](#).

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Notices

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U.S. Patents Disclosure

This product incorporates technology covered by one or more of the following patents: U.S. Patent Numbers: 6,094,505; 5,768,416; 5,625,465; 5,369,508; 5,258,855.



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