



Inbound Document Linker

Installation and Configuration Manual

Release 3.0

October 2002

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Please take a few moments to read the License Agreement in [“Appendix B –Software License Agreement” Page 55](#). By installing the **Panagon software**, the customer agrees to be bound by the terms of this agreement.

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About this Manual

This manual provides information about installing and configuring Inbound Document Linker 3.0 product.

Acronyms and Abbreviations used in this Manual

The table below lists the acronyms and abbreviations used in this manual.

Acronyms and Abbreviations	Explanation / Expansion
CIS	CRM Integration Suite
CRM	Customer Relationship Management
CS	Content Service
IDL	Inbound Document Linker
IDM	Integrated Document Management
IS	Image Service
DSN	Data Source Name
DLL	Dynamic Link Library

Education

FileNET provides various forms of instruction. Please visit the Global Learning Services in FileNET's Service & Support area at www.filenet.com.

Comments and Suggestions

FileNET invites all customers to communicate with the Documentation group on any question or comment related to FileNET manuals and online help. Fax, phone, mail, or email any question or comment to Mike Calvert at one of the numbers or addresses listed below. We guarantee a response to each communication within one week. Your suggestions help us improve the products we deliver.

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Before You Install

This Installation and configuration manual describes procedures for installing and configuring IDL 3.0 application.

Prior to beginning the installation, we recommend that you:

- Read all overview information, installation procedures, and configuration procedures.
 - [“IDL 3.0 an Overview” on page 8](#)
 - [“Installation Process” on Page 9](#)
 - [“IDL 3.0 Configuration” on page 43](#)
 - [Appendix A](#)
 - [Appendix B](#)
 - Read the Release Notes. You can find the release notes on the FileNET website at <http://www.css.filenet.com>.
- Be prepared to reference additional documents as needed. For example, any further detail about Siebel can be found from Siebel Bookshelf and details about Open Client can be found from the documentation provided with the open client.

IDL 3.0 an Overview

Inbound Document Linker enables batch linking of FileNET documents to Siebel records. For each document of the batch, matching Siebel records are found and links are stored in the Document Link Table of CIS database. Matching rules are defined in CIS database.

IDL 3.0 Configuration Tool

IDL 3.0 comes along with a helper tool IDL 3.0 Configuration Tool. This tool provides an interface to configure IDL 3.0 Application.

System Prerequisites

System must meet the following configuration requirements

Hardware

- PIII 500 MHz class Processor and above.
- 1 GB disk space.
- 256 MB memory.

Software

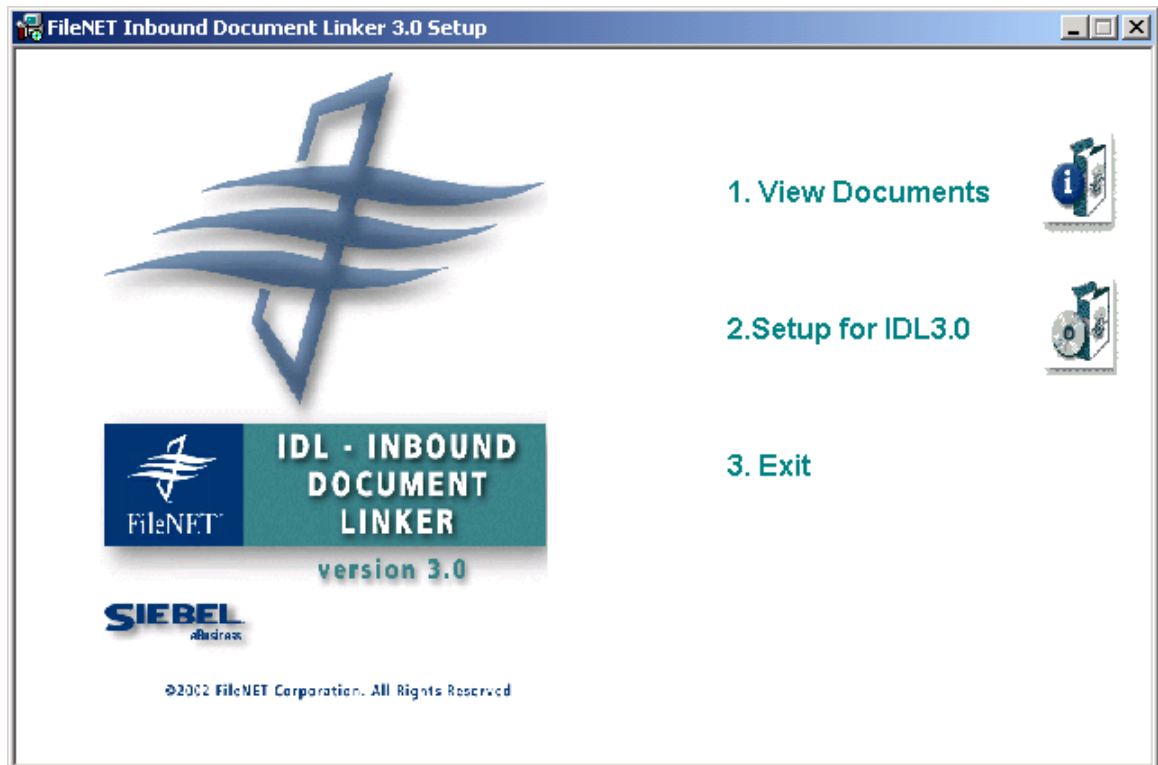
- Windows 2000 Server with service Pack 2 and above
- FileNET IDM Web Services 3.2 / IDM Desktop 3.1
- Siebel 7.0.4 dedicated Client
- Connectivity to SQL Server 2000 / Oracle 8i Database

2

Installation

This chapter provides information, instruction and guidelines for installing IDL3.0 application.

Launch setup.exe to install IDL3.0 application, following screen will appear.

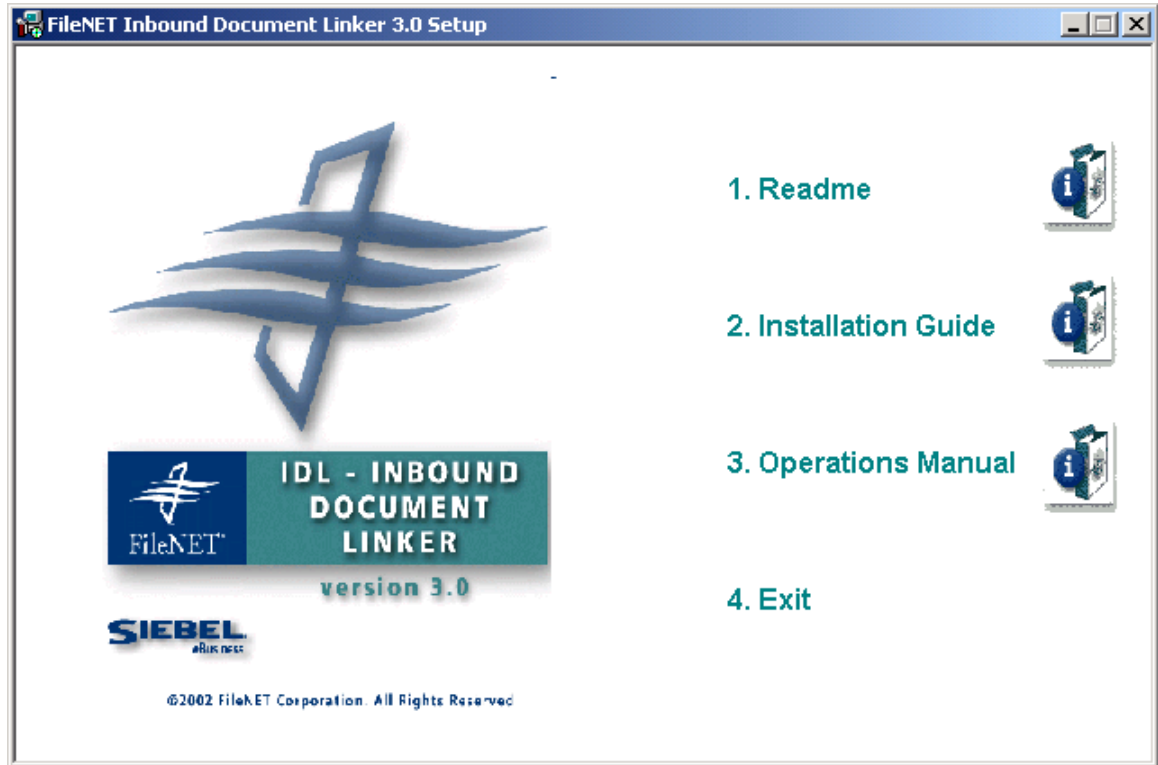


There are 3 options provided on the splash screen. These options are as follows:

1. **View Documents** – This option facilitates user to view all IDL 3.0 documents. There are 3 documents provided with this IDL release viz. Readme file, Installation and Configuration Guide and Operation Manual.
2. **Setup for IDL 3.0** – Select **IDL 3.0 Setup** to install IDL3.0 Application.
3. Click on **Exit** to exit from the setup program.

Viewing Documents

Click on **View Documents** to view the documents provided with IDL3.0 application.

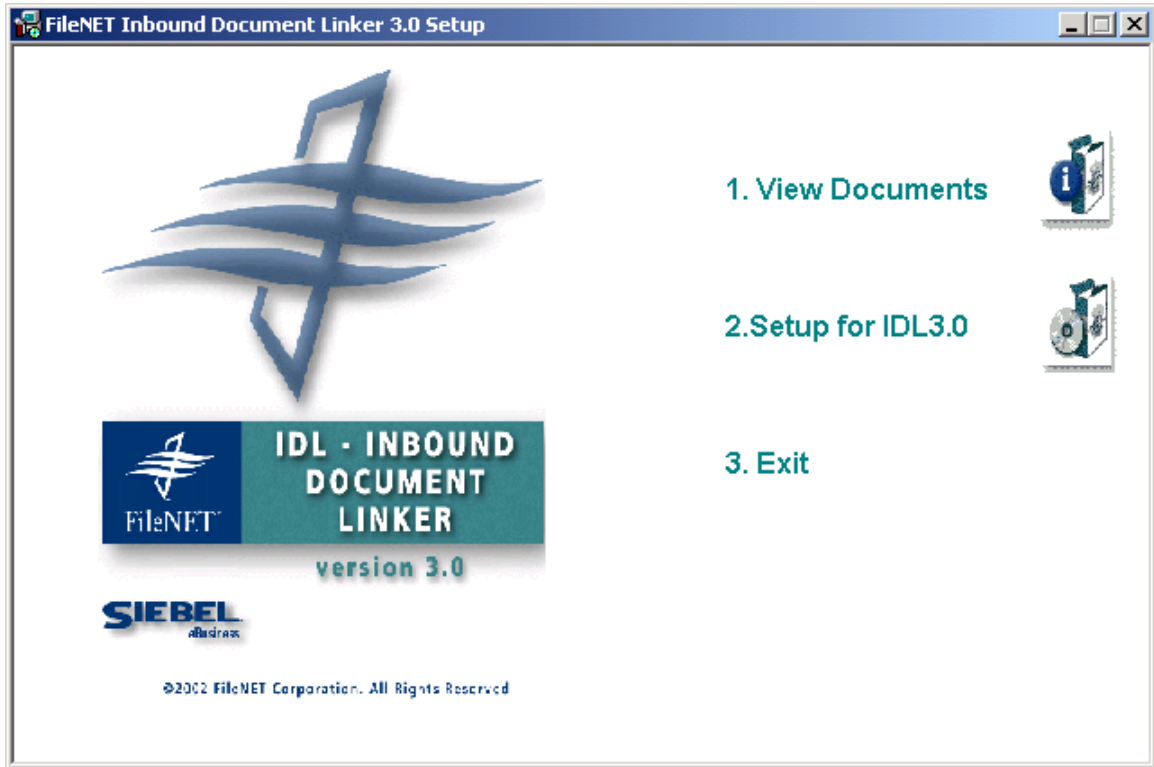


To view IDL 3.0 documents, click on appropriate option. In order to view these documents Acrobat Reader must be installed on the system.

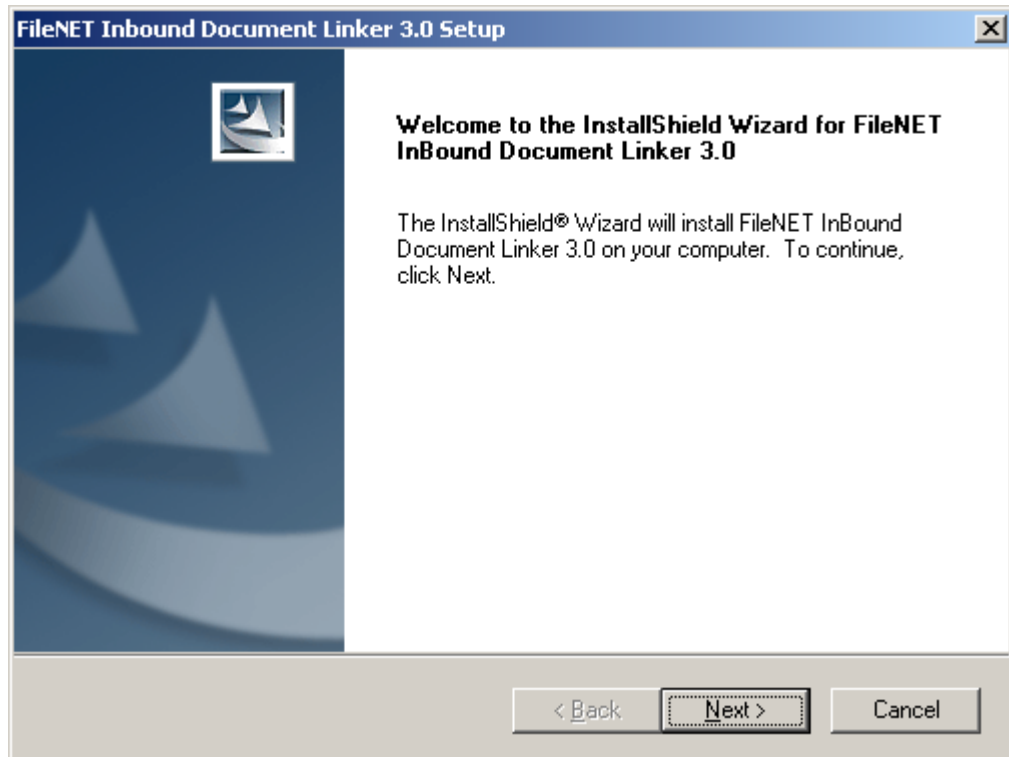
Click on **Exit** to go back to the previous screen.

Installing IDL3.0 application

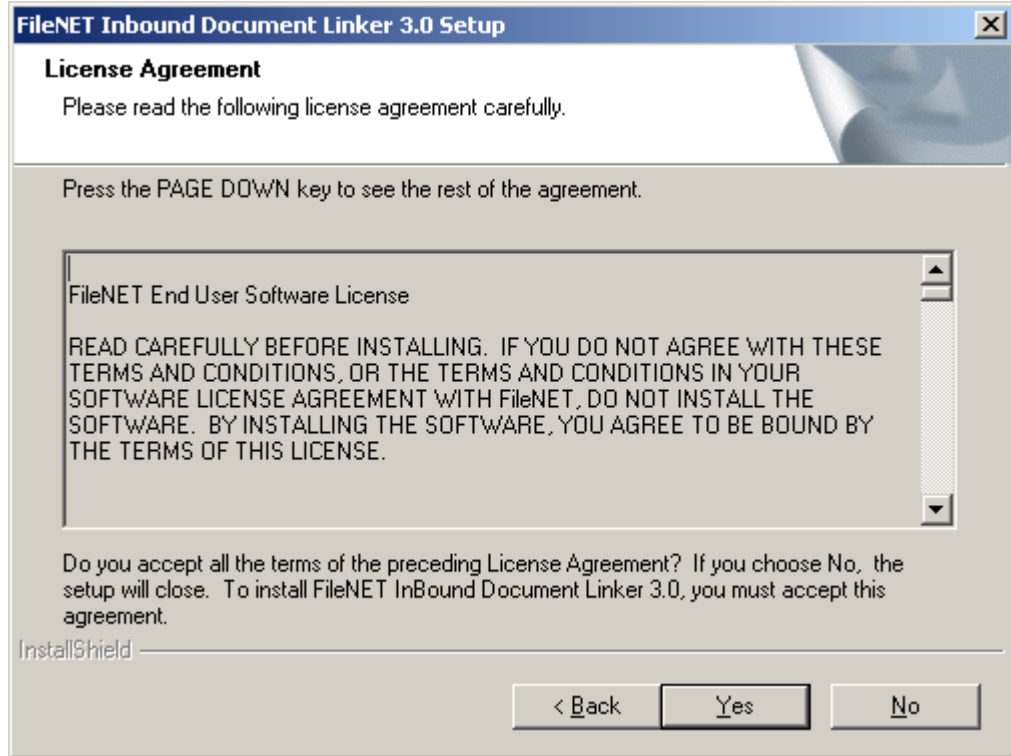
To install IDL 3.0 application, click on **Setup for IDL3.0**.



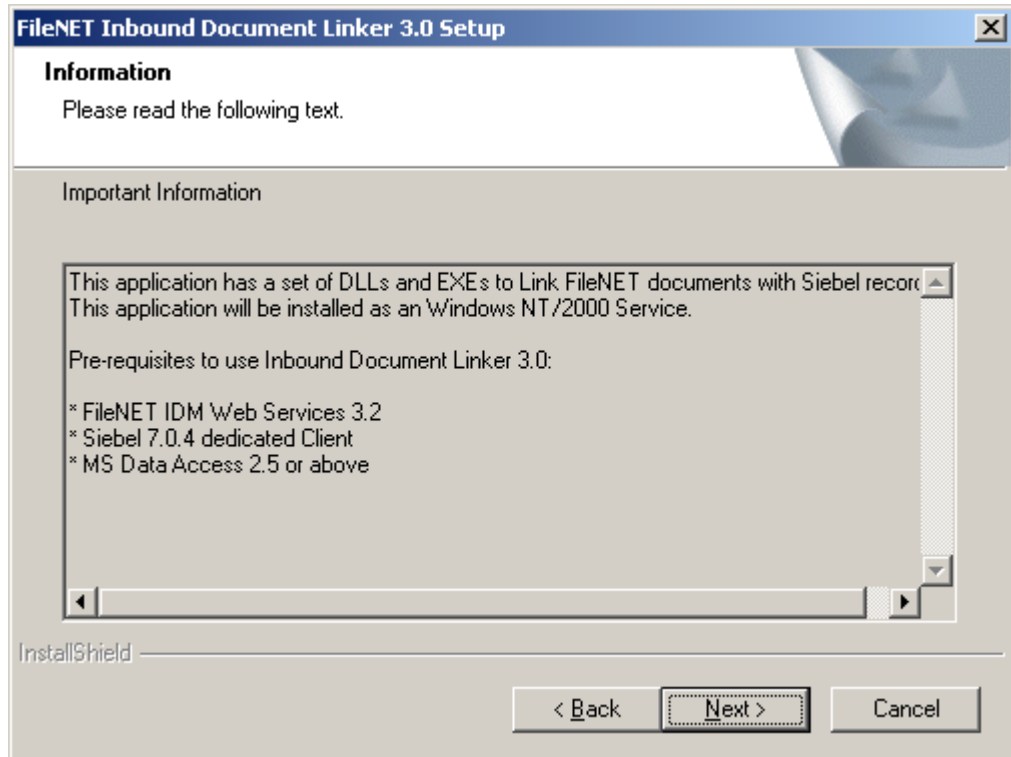
Following screen will appear.



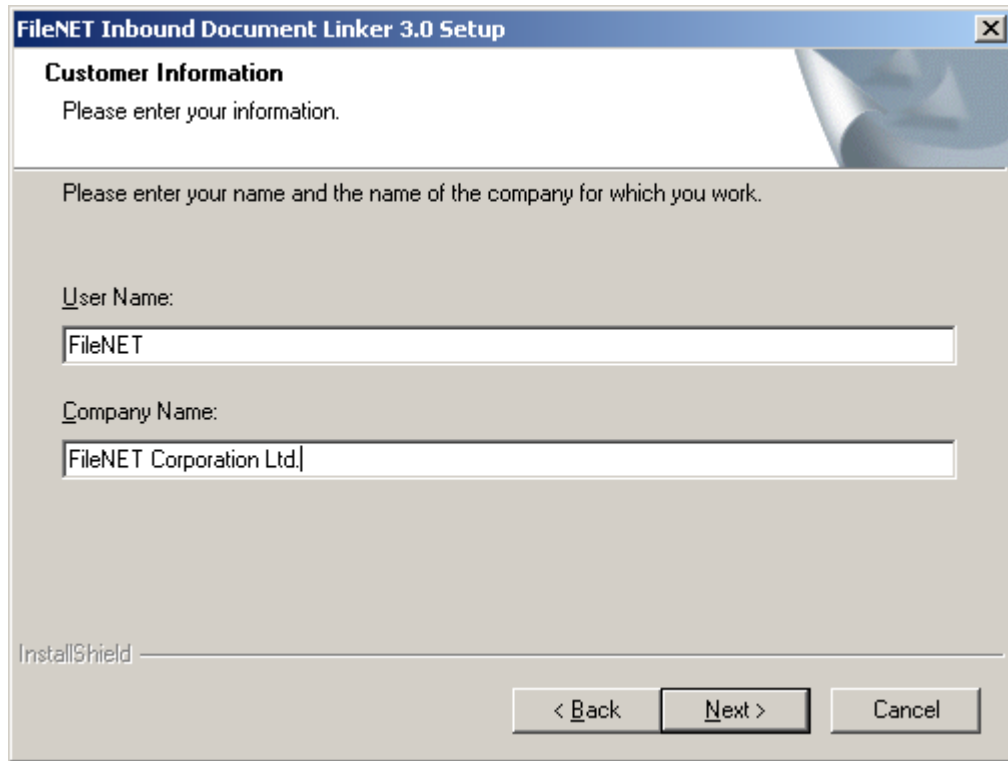
To continue, click on **Next** button. Following screen will appear.



To accept the License agreement, click on **Yes** button. Following screen will appear.

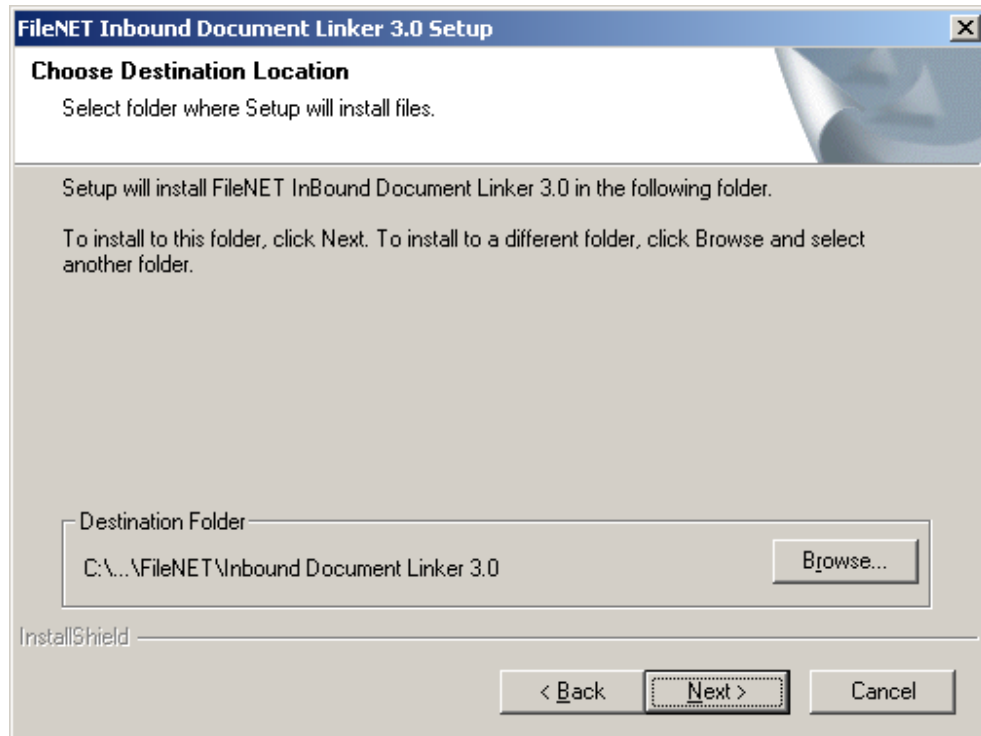


To continue, click on **Next** button. Following screen will appear.



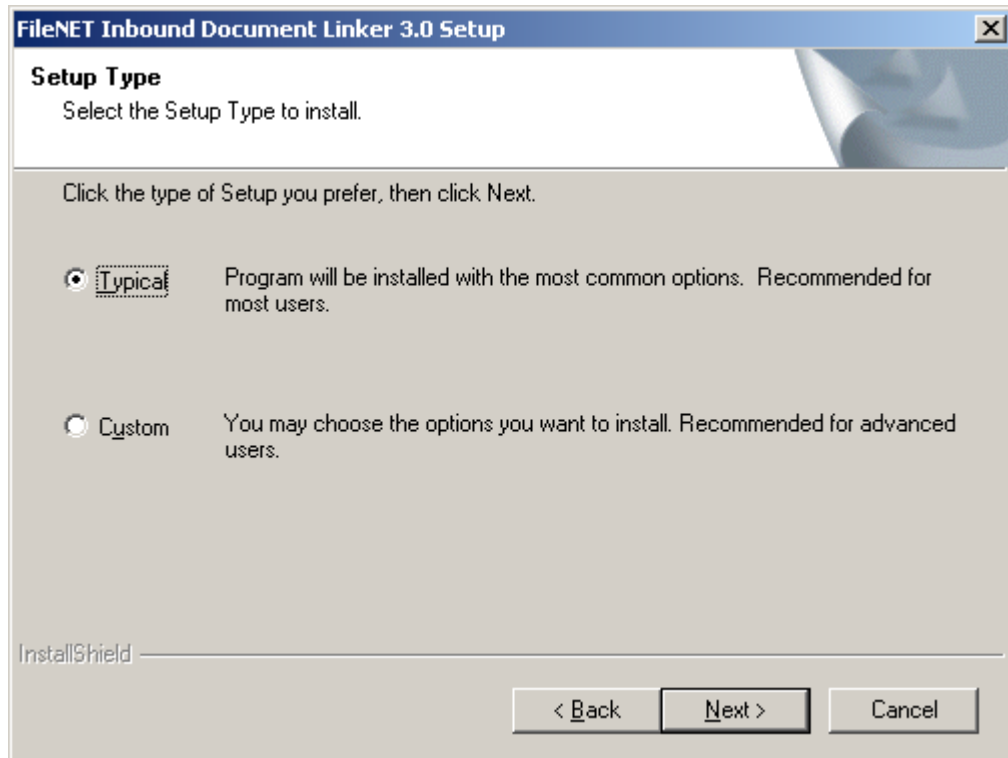
The screenshot shows the 'FileNET Inbound Document Linker 3.0 Setup' window. The title bar is blue with the text 'FileNET Inbound Document Linker 3.0 Setup' and a close button. The main area has a white header with the title 'Customer Information' and the instruction 'Please enter your information.' Below this, a grey box contains the text 'Please enter your name and the name of the company for which you work.' There are two text input fields: 'User Name:' with the value 'FileNET' and 'Company Name:' with the value 'FileNET Corporation Ltd.'. At the bottom left, it says 'InstallShield'. At the bottom right, there are three buttons: '< Back', 'Next >', and 'Cancel'.

Enter Customer Information i.e. User name and Company Name. Default values are taken from the system. To continue, click on **Next** button. Following screen will appear.



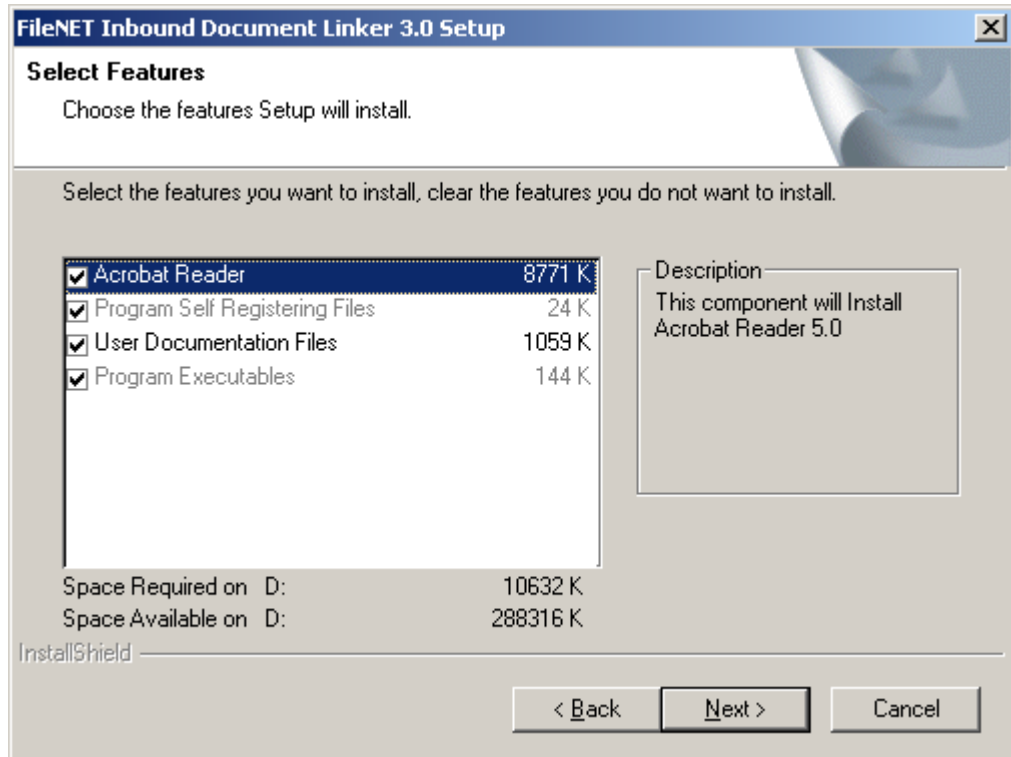
The screenshot shows the 'FileNET Inbound Document Linker 3.0 Setup' window. The title bar is blue with the text 'FileNET Inbound Document Linker 3.0 Setup' and a close button. The main area has a white header with the title 'Choose Destination Location' and the instruction 'Select folder where Setup will install files.' Below this, a grey box contains the text 'Setup will install FileNET InBound Document Linker 3.0 in the following folder.' and 'To install to this folder, click Next. To install to a different folder, click Browse and select another folder.' There is a text input field labeled 'Destination Folder' with the value 'C:\...\FileNET\Inbound Document Linker 3.0' and a 'Browse...' button to its right. At the bottom left, it says 'InstallShield'. At the bottom right, there are three buttons: '< Back', 'Next >', and 'Cancel'.

Select the destination folder by clicking on **Browse** button. To keep default folder, click on **Next** button. Following screen will appear.



Choose IDL 3.0 setup type. To continue click **Next** button:

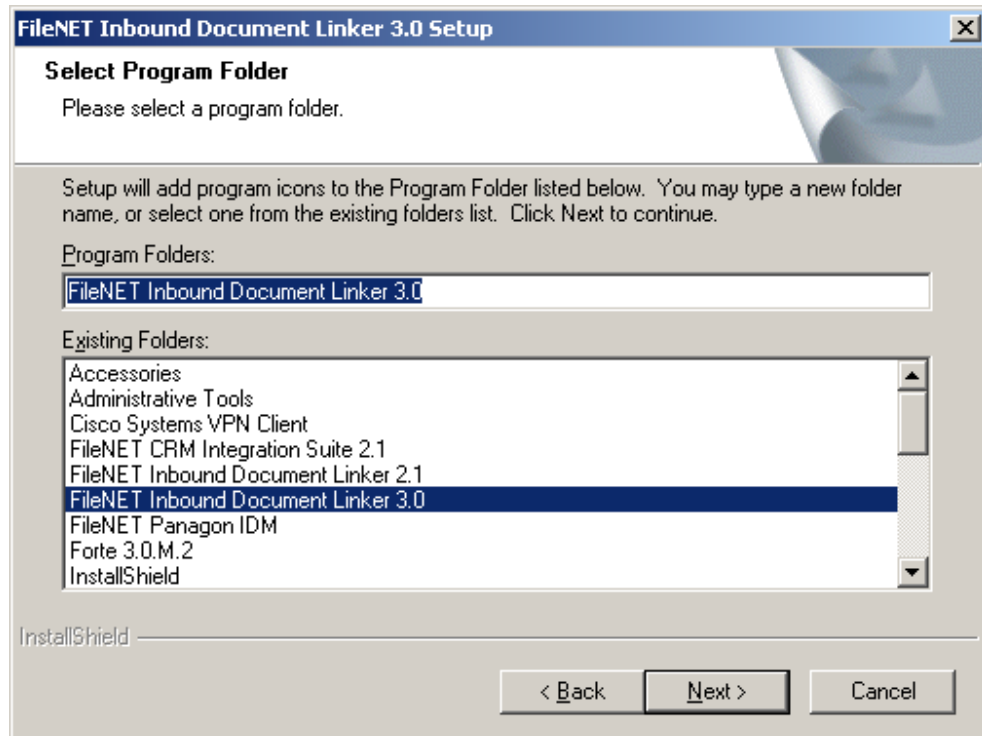
- | | |
|----------------|---|
| Typical | Choose this setup type to install all IDL 3.0 components with most common options. This option skips installation of Acrobat Reader and User Documentation. |
| Custom | This setup option lets you customize your installation by choosing the specific components you want to install. |



Select the components that you want to install in the IDL 3.0 setup.

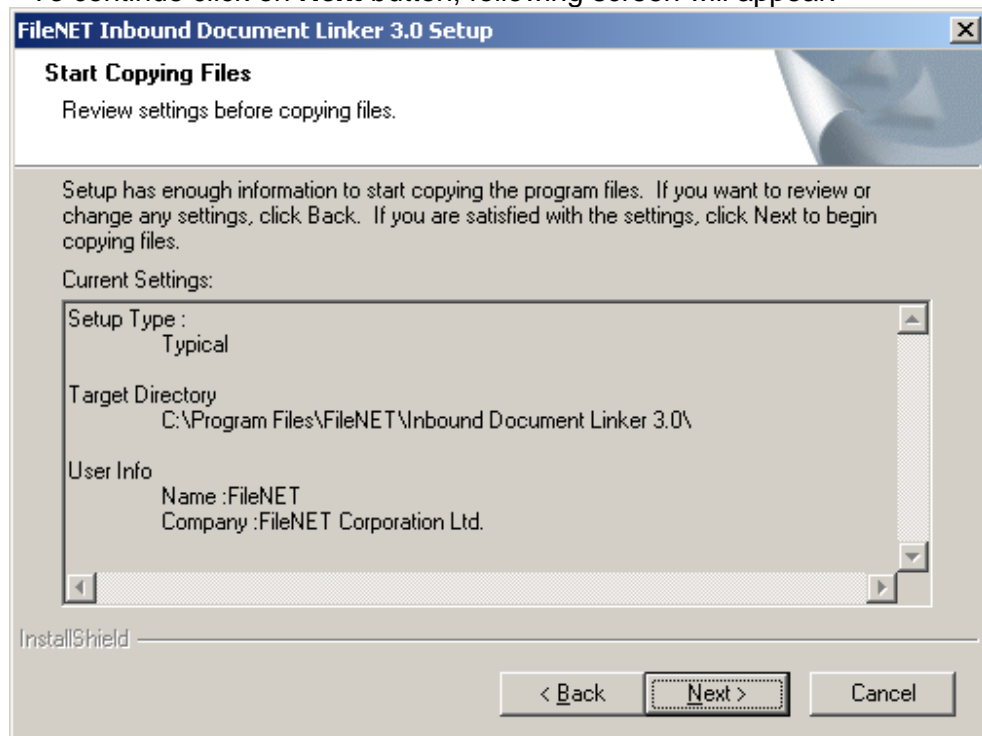
Note This screen will only appear if **Custom** setup type is chosen in the previous screen. For **Typical** and **Compact** skip to next screen

To continue, click on **Next** button. Following screen will appear.



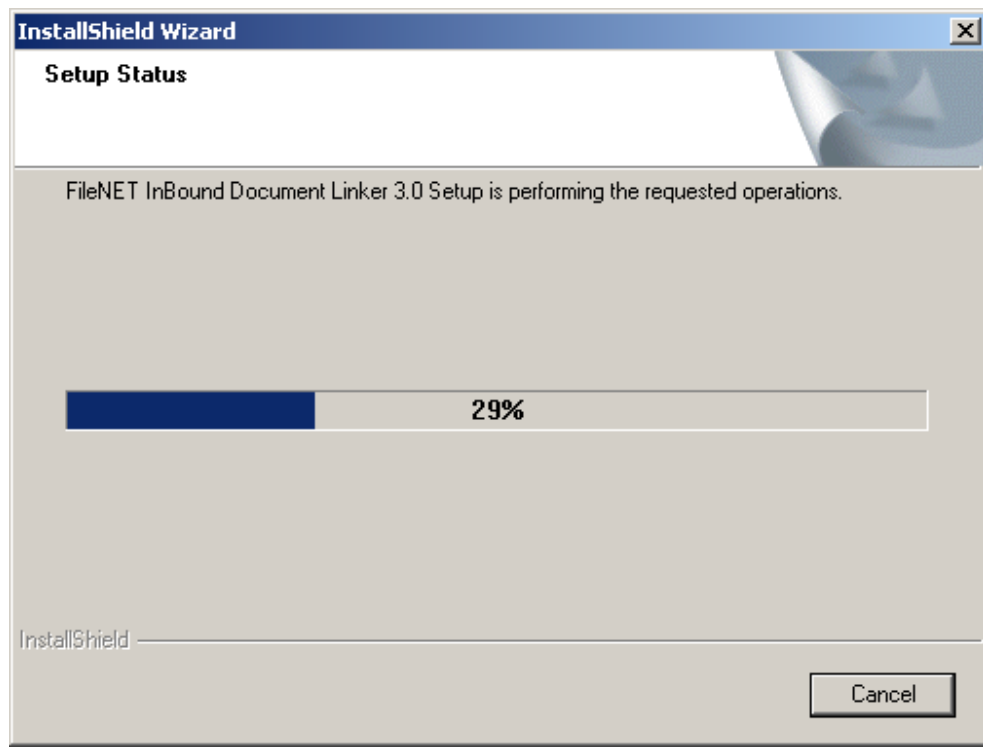
Enter the Folder name for IDL3.0 application. IDL 3.0 application will appear with this name under Program Files folder of windows. Default folder name is **FileNET Inbound Document Linker 3.0**.

To continue click on **Next** button, following screen will appear.

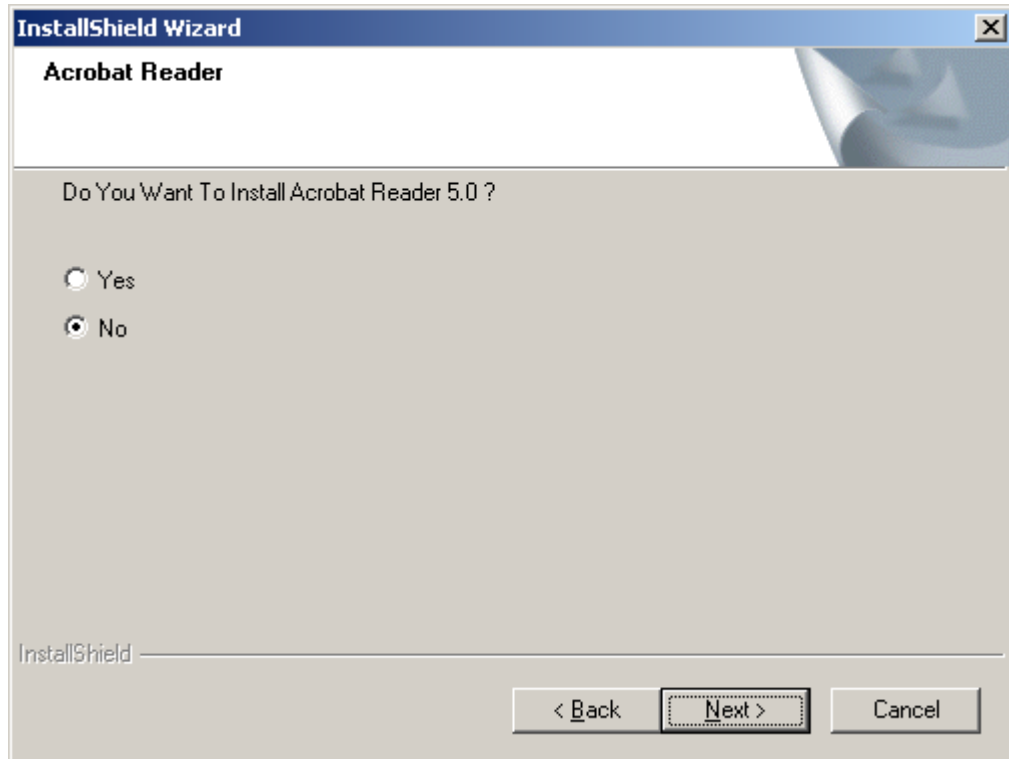


Verify the information provided by you in the previous screen. Click on **Back** button to revisit the previous screens and modify the information.

To continue, click on **Next** button. Following screen will appear.



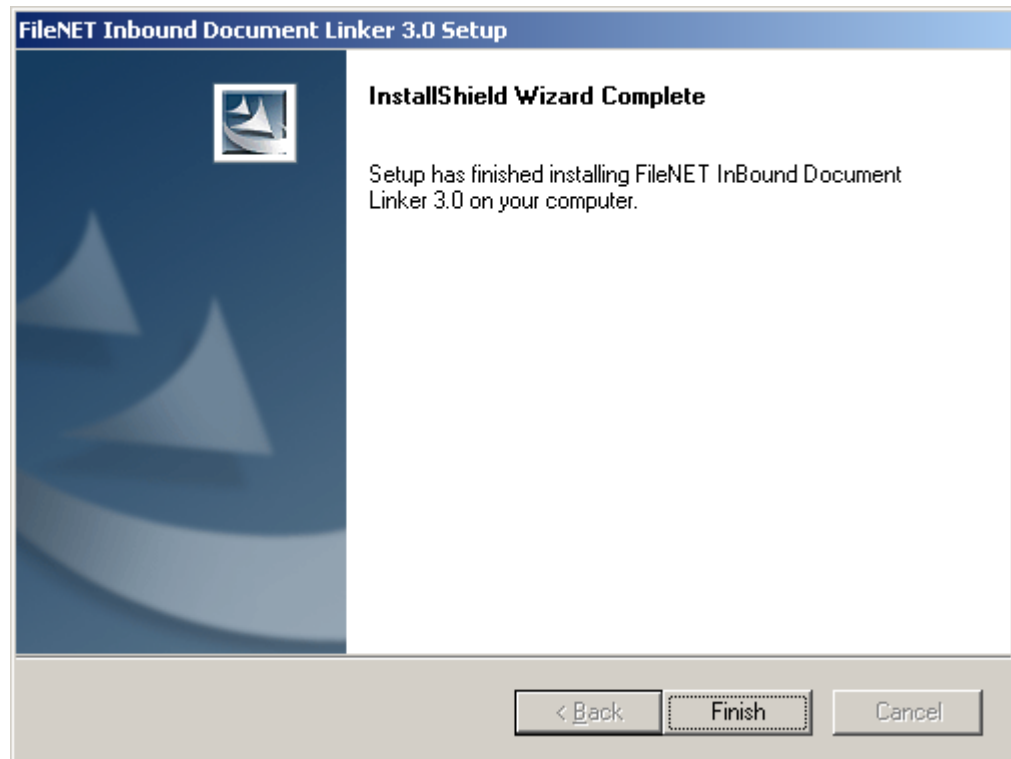
Wait while setup performs the requested operation.



Select appropriate option to install Acrobat Reader.

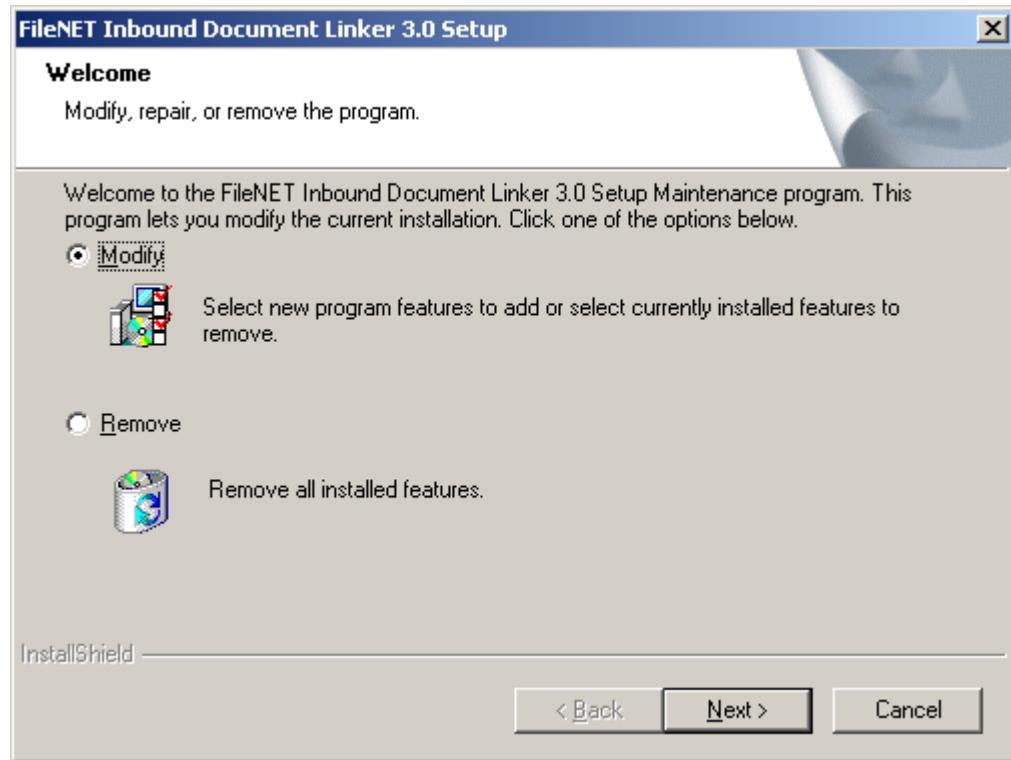
Note This screen will only appear Acrobat Reader box is checked in **Custom** option.

To continue, click on **Next** button, following screen will appear.

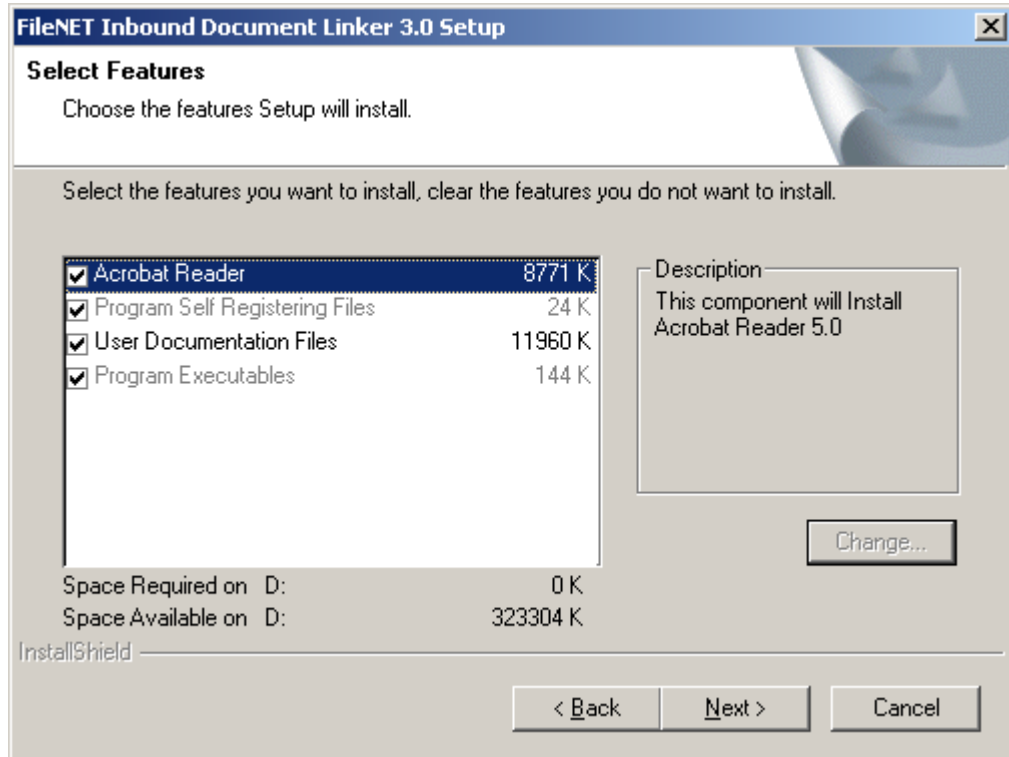


To complete IDL 3.0 installation click on **Finish**.

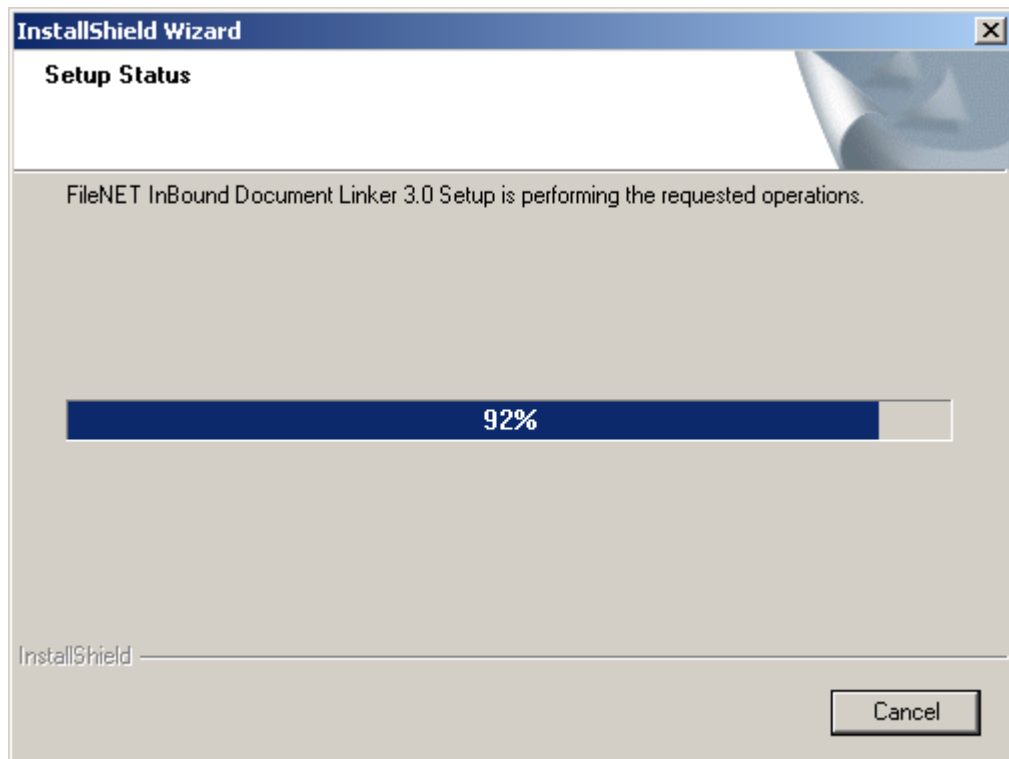
Modifying IDL 3.0 Application



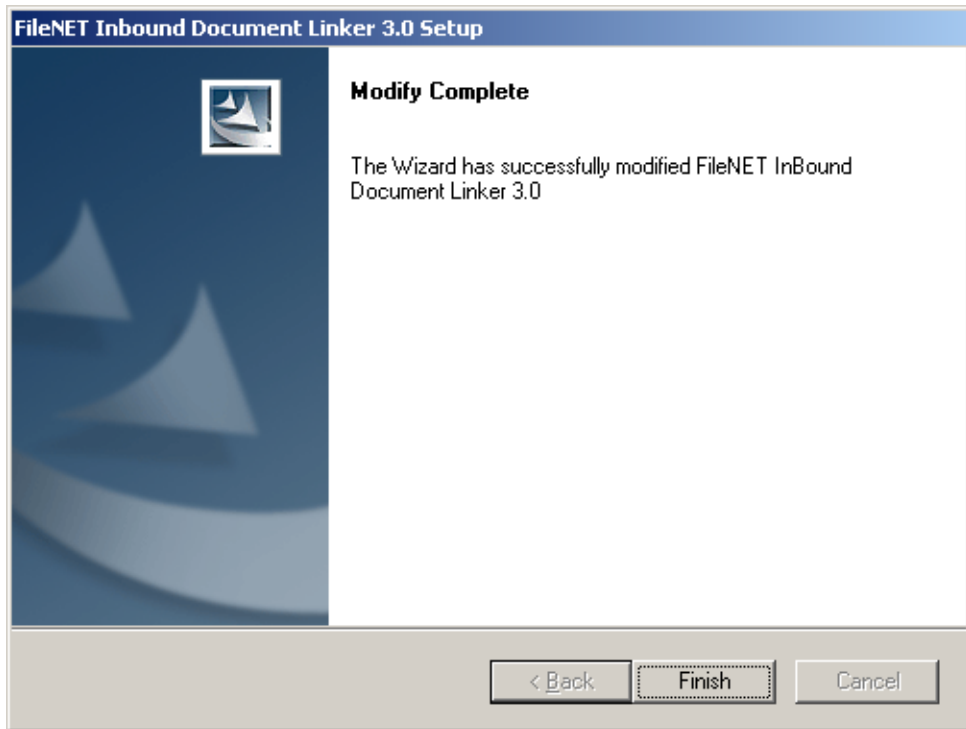
Select appropriate option. To continue, click on **Next** button. Following screen will appear.



Check the components to install and uncheck those to uninstall. IDL 3.0 modifies the installation by uninstalling the components that are unchecked and by reinstalling the components that are checked.

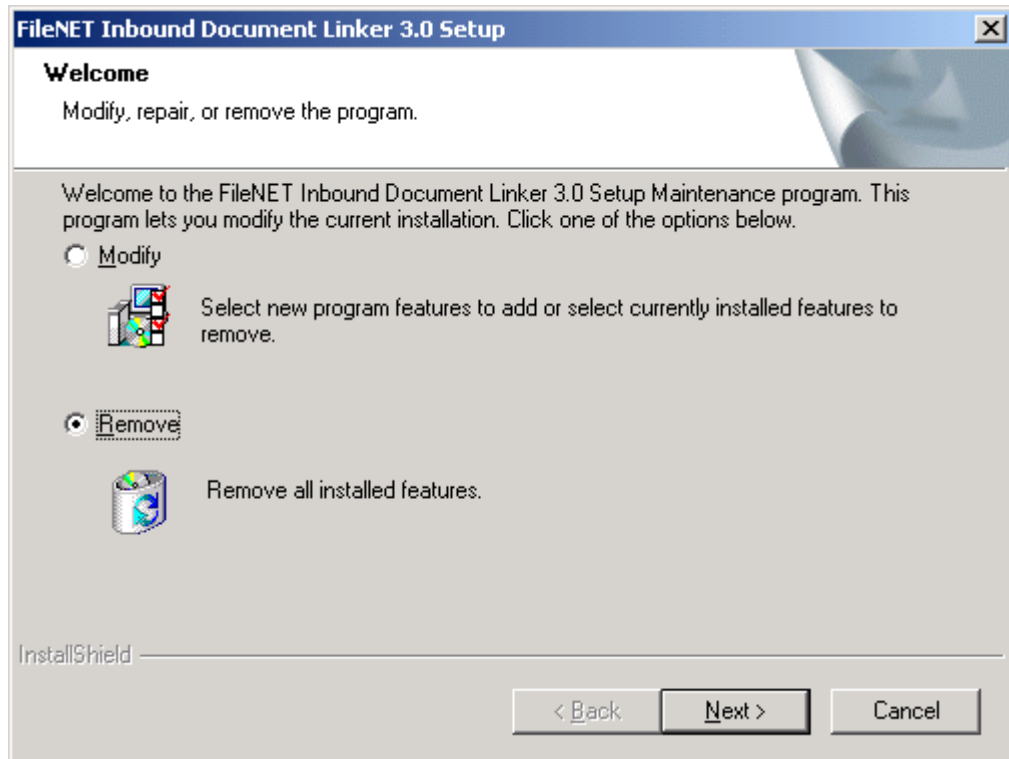


Wait while setup performs the requested operation.

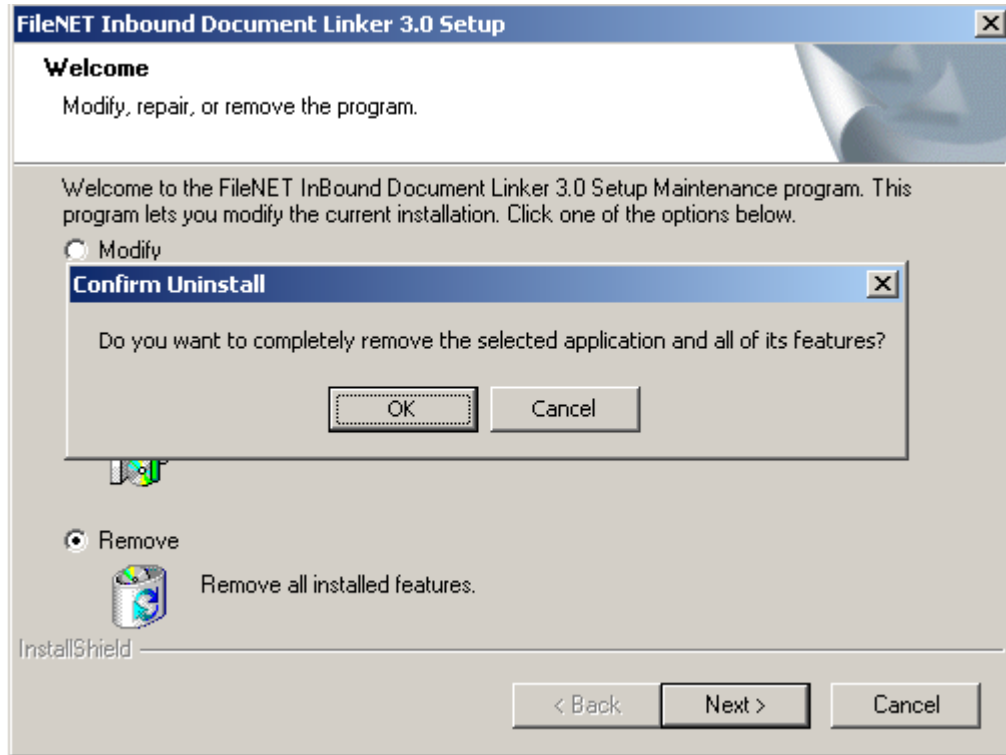


Click on **Finish** button to complete modification process.

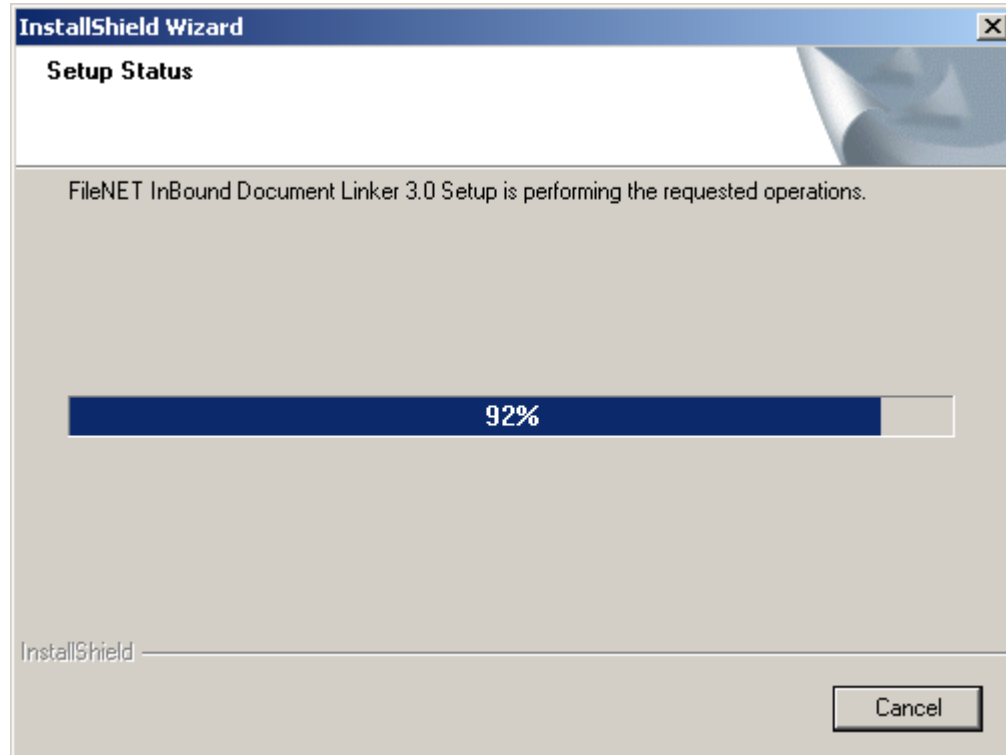
Removing IDL 3.0 Application



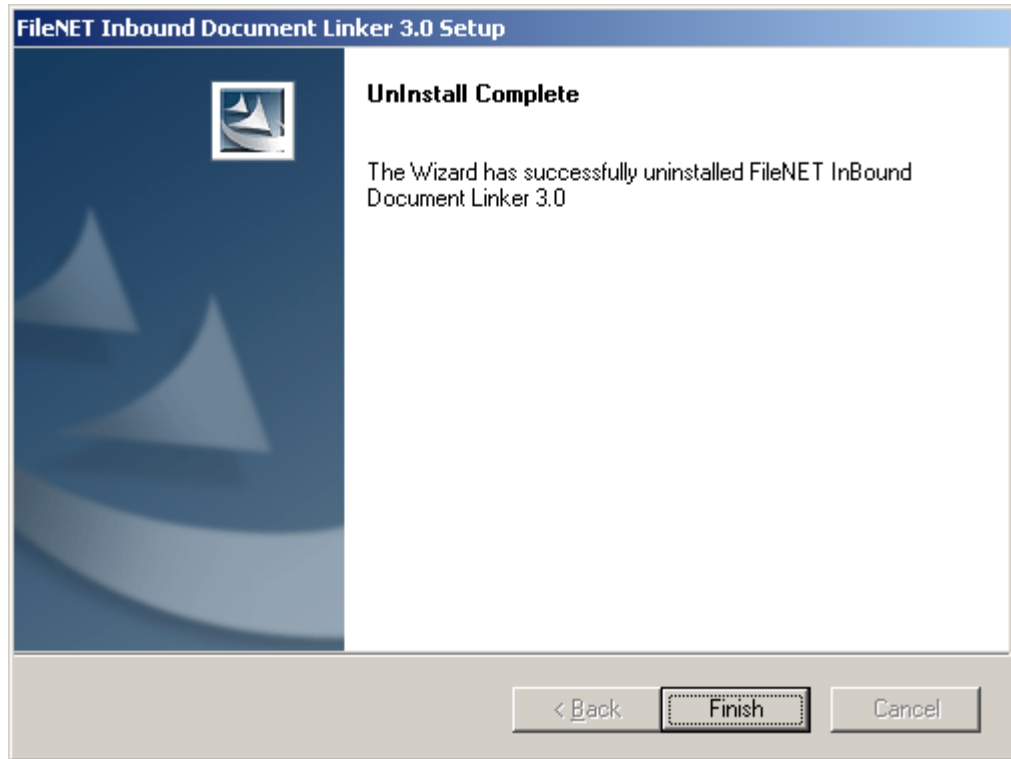
To remove all installed features, select **Remove** option.



Click on **OK** button to proceed with remove option.



Wait while Setup performs the requested operation.

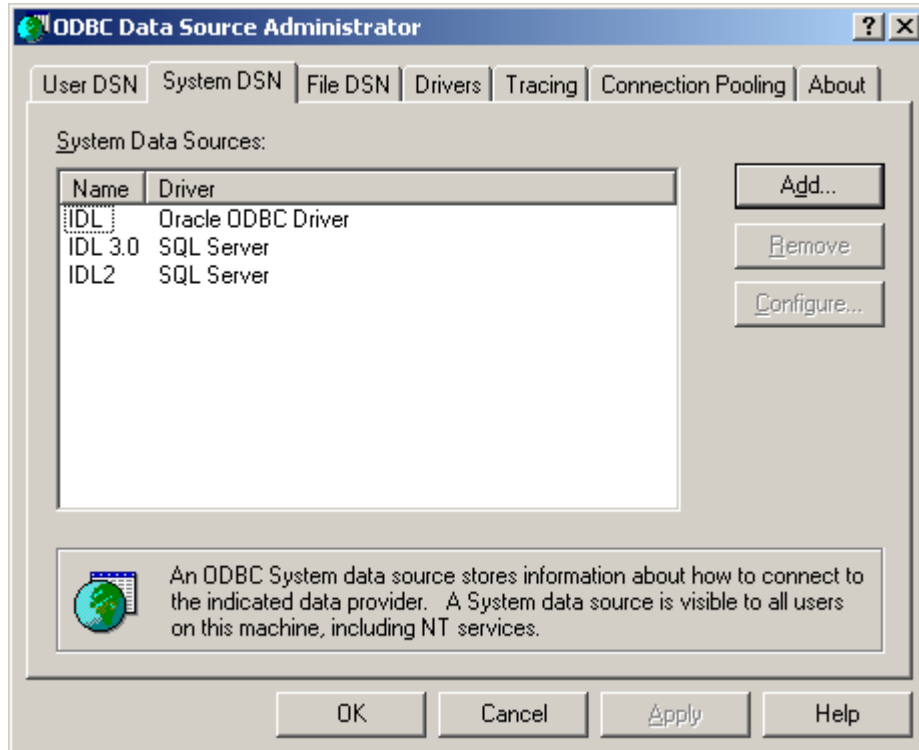


To complete uninstallation, click on **Finish** button.

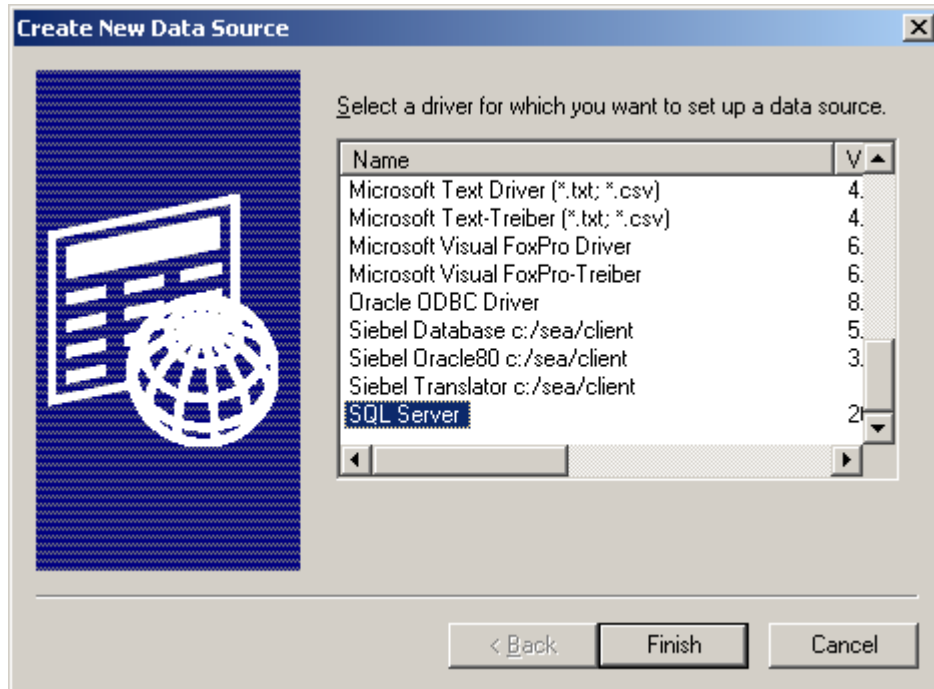
3

Configuring DSN

From the Start menu of Windows explorer, select Settings->Control Panel ->Administrative Tools->Data Sources (ODBC). Click on System DSN tab. Following screen appears.

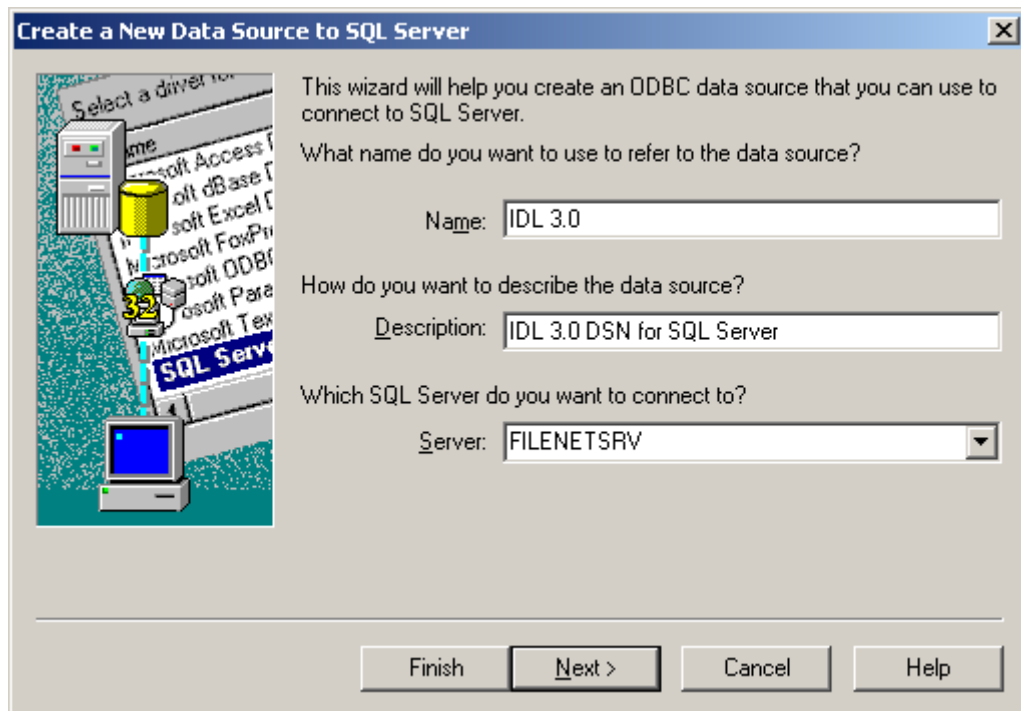


Click on **Add** button to add new Data Source. Following screen will appear.

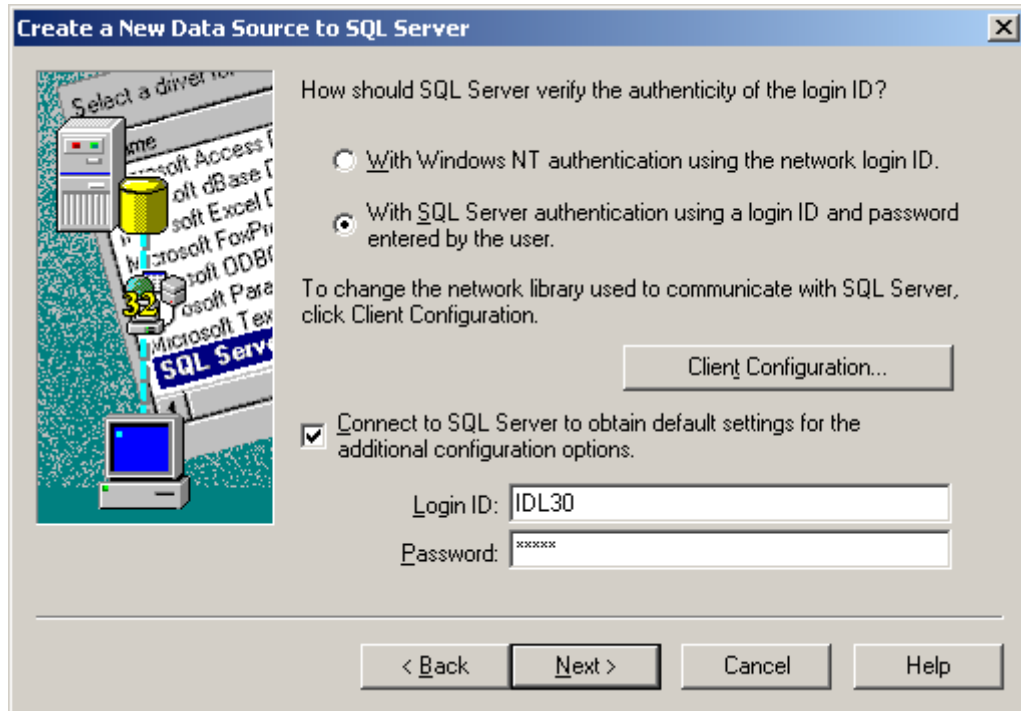


Select appropriate driver and click on **Finish** Button.

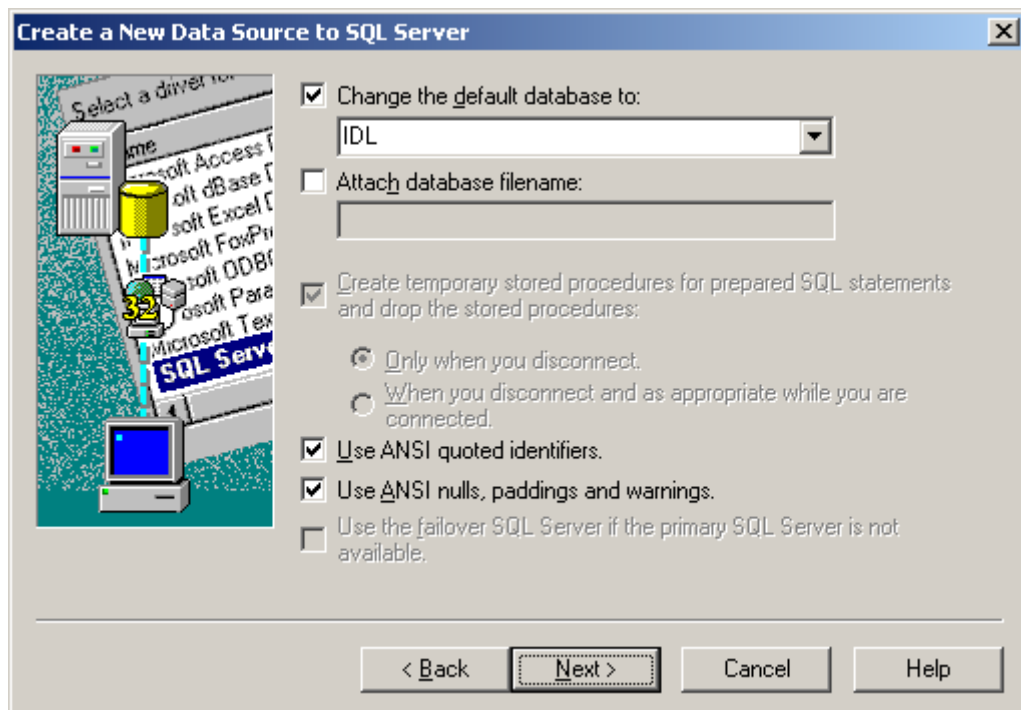
Configuring DSN for SQL Server database



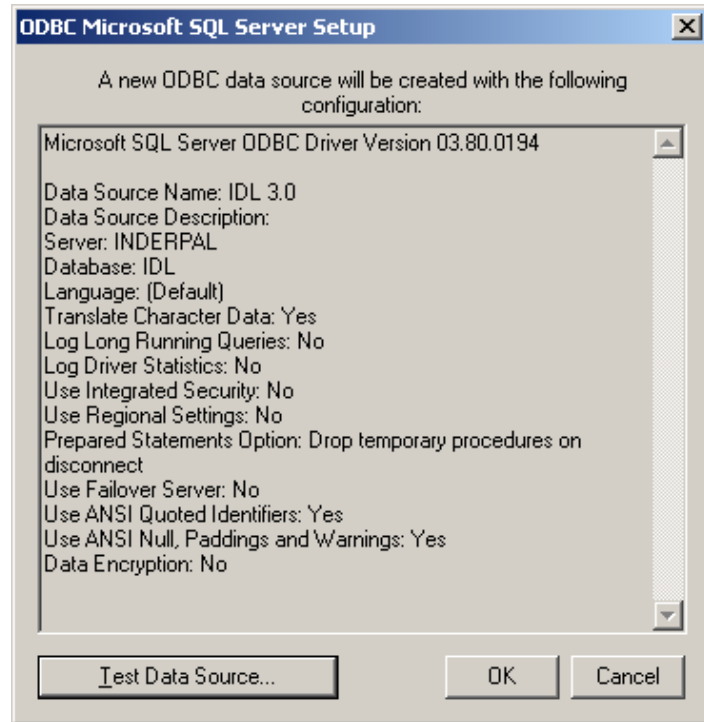
Above screen appears if SQL Server driver is chosen in previous screen. Enter the name of data source, Description and Server name and click on **Next** button.



Select appropriate option for login authentication. Provide login credentials. Click on **Next** to continue. Following Screen will appear.

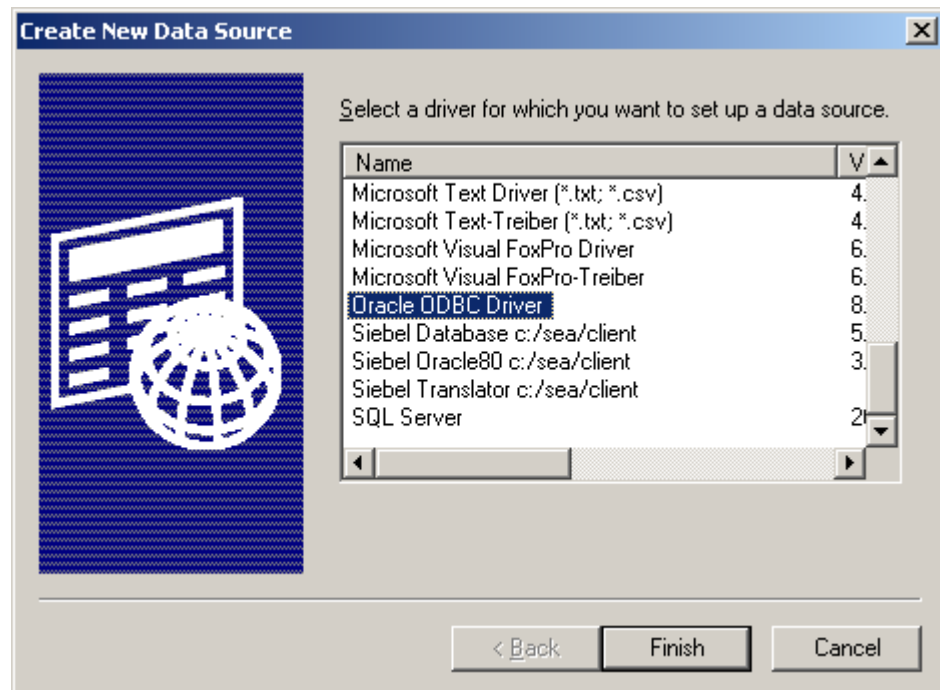


Select database and click on **Next** to continue. Following screen will appear.



Verify the information provided and click on Test Data Source to test the connection with the server. Click on **OK** to finish the process.

Configuring DSN for Oracle database



Select Oracle driver from the list of drivers.

Oracle8 ODBC Driver Setup

Data Source Name: IDL3.0

Description: IDL 3.0 DSN for Oracle Database

Data Source

Service Name: fn_tst.ggn.hcltech.com

UserID: CISADMIN

Database Options

Connect to database in Read only mode

Prefetch Count: 10

WorkAround Options

Force Retrieval of Long Columns

Disable MTS Support

Application Options

Enable Thread Safety Enable LOBs Enable Result Sets

Enable Failover Retry Count: 10 Delay: 10

Enable Query Timeout Enable Closing Cursors

Translation Options

Option: 0

Library:

Enter Data Source Name, description and data source credentials. Click on **OK** to finish configuration.

4

IDL 3.0 Configuration

IDL 3.0 Configuration tool is used to configure IDL 3.0 application. To access IDL configuration tool, click on Start->Program Files->FileNET Inbound Document Linker3.0->IDL Configuration Tool.

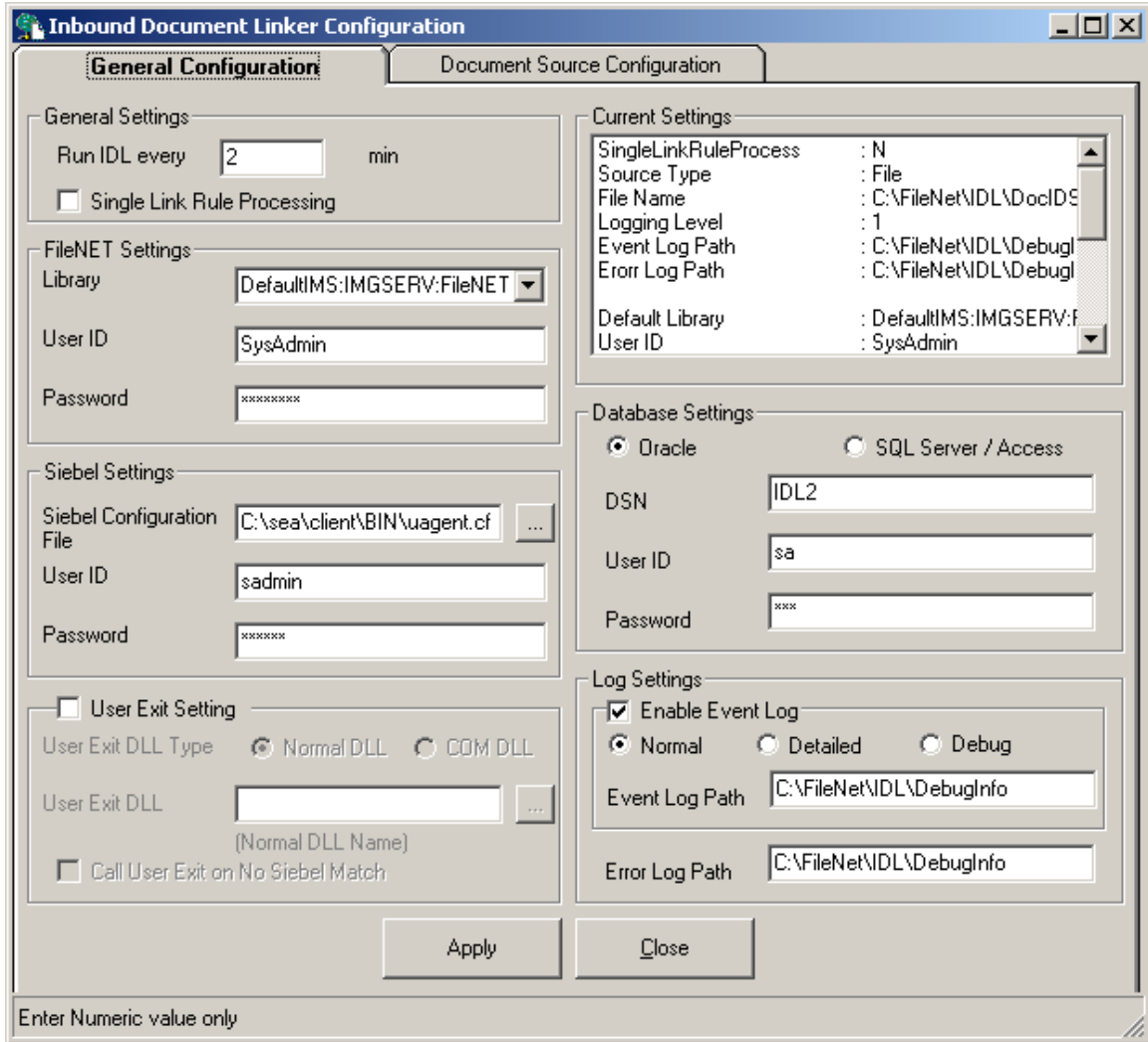
FileNET Inbound Document Linker Program Group contains IDL 3.0 Configuration Tool, IDL 3.0 Operations Guide, IDL 3.0 Installation and Configuration Guide and Readme file.

Configuration involves following two steps:

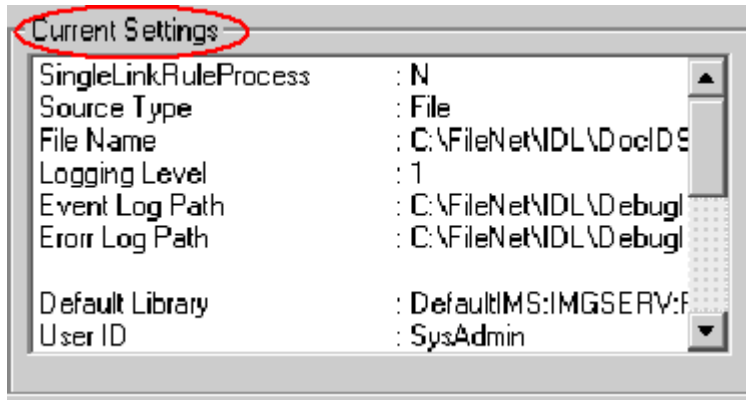
- [General Configuration](#)
General Configuration consists of General Settings, FileNET Library Settings, Siebel Settings, Database Settings, User Exit Settings and Log Settings.
- [Document Source Configuration](#)
Document Source Configuration consists of Source Type and depending on that File Name or Queue Name and Workspace.

General Configuration

Following screens show General Configuration of IDL 3.0 application:

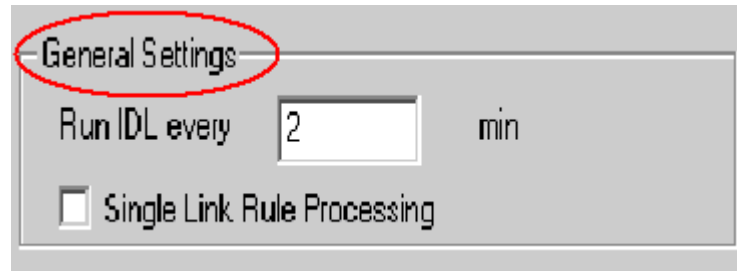


Current Settings



The text area **Current Settings** lists the current configuration settings.

General Settings



General Settings

Run IDL every min

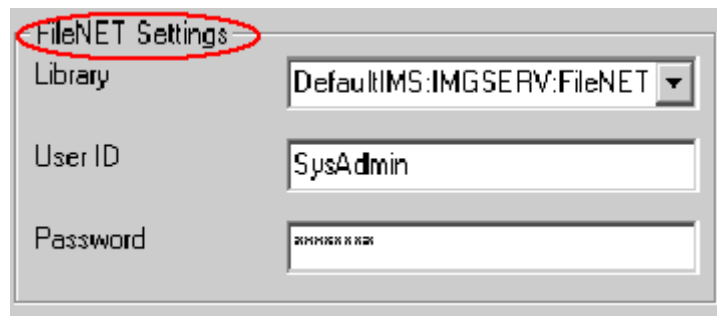
Single Link Rule Processing

Following General settings are configurable.

Run IDL every... min: Define time interval after which IDL Service will periodically start new batch process for 'Document Processing'.

Single Link Rule Processing: Check this checkbox to process Single Link Rule for Document Id until a Siebel Match is found. Once a Siebel match is found for a Document ID remaining Link rules are skipped. This option optimizes link rule processing and improves performance.

FileNET Settings



FileNET Settings

Library

User ID

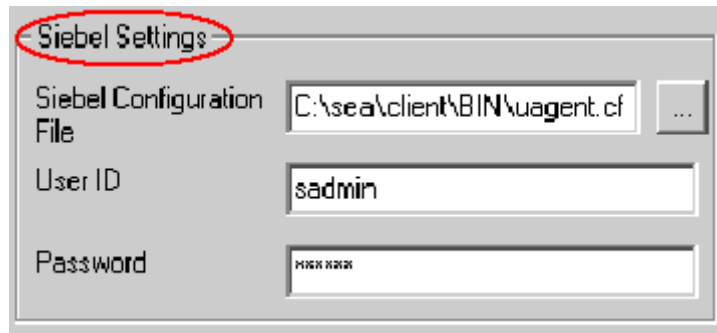
Password

Library: Specify the FileNET Library, for which documents will be processed.

User ID: Specify User ID for the selected FileNET Library.

Password: Specify Password for the user specified in User ID text box

Siebel Settings



The screenshot shows a dialog box titled "Siebel Settings". The title bar is circled in red. The dialog contains three fields:

- Siebel Configuration File:** A text box containing the path "C:\sea\client\BIN\uagent.cf" and a browse button ("...").
- User ID:** A text box containing the value "sadmin".
- Password:** A text box containing a masked password "XXXXXXXXXX".

Siebel Configuration File: Path where Siebel Configuration file (uagent.cfg) is located. 'uagent.cfg' file resides in \client\bin\enu subfolder under Siebel Installation folder.

User ID: User ID that will be used to connect to Siebel for IDL Processing.

Password: Specify Password for the user specified in User Id text box.

Database Settings

The screenshot shows a dialog box titled "Database Settings". At the top, there are two radio buttons: "Oracle" (which is selected) and "SQL Server / Access". Below these are three text input fields: "DSN" with the value "IDL2", "User ID" with the value "\$a", and "Password" with the value "***".

Specify database type for IDL 3.0 database by selecting appropriate radio button

DSN: Specify Data Source Name for IDL3.0 Database. DSN configuration is described under section '[Configuring DSN](#)'.

User ID: User ID for IDL Database.

Password: Password for the user specified above.

User Exit Settings

The screenshot shows a dialog box titled "User Exit Setting". At the top, there is a checked checkbox labeled "User Exit Setting". Below it are two radio buttons for "User Exit DLL Type": "Normal DLL" and "COM DLL" (which is selected). There is a text field for "User Exit DLL" containing "edmsUserExit.clsUserExitImpl" and a browse button "...". Below the text field, the text "(COM DLL Name.ClassName)" is displayed. At the bottom, there is another checked checkbox labeled "Call User Exit on No Siebel Match".

Check this Check Box for **User Exit** processing.

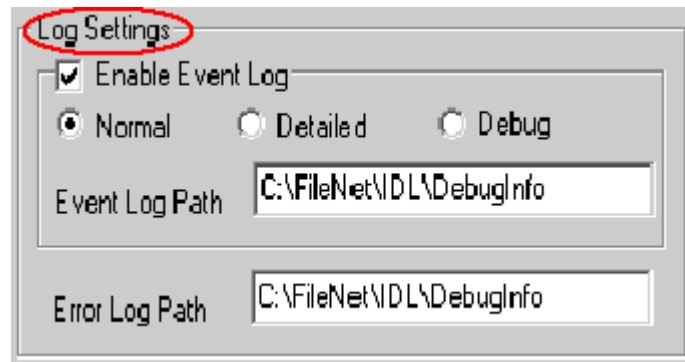
Note: **User Exit** is an external application that is called from IDL 3.0 application. If 'User Exit' application returns true only then links will be created for matching Siebel records.

User Exit DLL Type: Specify the type of 'User Exit Application' DLL .It can be Normal DLL or COM DLL.

User Exit DLL: Specify user exit DLL. In case of Normal DLL, enter complete path of User Exit dll, whereas in case of COM DLL, enter progid (UserExitDLL.UserExitClass) of user exit DLL.

Call User Exit On No Siebel Match: Check this option to call 'User Exit' application even if matching Siebel record is not found and corresponding action in Link Rules table is 'User Exit'.

Log Settings



Enable Event Log: Select this option to enable Event Logging. If multiple queues are configured then separate Event Log files are created for each Queue in IDL_Instance_QueueName_Event_Log_YYYYMMDD_HHMMSS.log format. If checkbox is unchecked, Event log files are not created.

Event Log Level: Select appropriate error log level

- *Normal:* Log key Events for IDL.
- *Detailed:* Log Detailed events for IDL by which user can find various processing times for IDL such as Log on time to FileNET Library, Logon time to Siebel Application Server, Log on time to IDL3.0 Database, fetching time of Doc id from the queue etc.
- *Debug:* Log all those events for IDL that help user to debug the application

Event Log Path: Path where the Event Log File will be created.

Error Log Path: Path where the Error Log File will be created.

To save the changes click on **Apply**. To exit the application, click on **Close** button.

Document Source Configuration

The screenshot shows the 'Document Source Configuration' tab of the 'Inbound Document Linker Configuration' window. The 'Source Type' section is circled in red, with 'Queue' selected and 'File' unselected. Below this, there is a 'File Name' field with a browse button. A checked 'Modify Configured Queue' section contains a checked 'Queue(s) Configured for a Document Class' section. This section has three dropdown menus: 'FileNET Workspace' (IDL), 'FileNET Queue Name' (Q1), and 'Document Class' (Account). To the right of these are 'Add' and 'Delete' buttons. Below the dropdowns is a table with the following data:

S.No	Workspace	Queue	Document Class
1	IDL	Q1	Account

At the bottom of the window are 'Apply' and 'Close' buttons.

Source Type: Specify source of Document Ids.

Two Options are:

- Queue
In this case Document Ids are picked up from the configured queue(s).
- File
In this case Document ids are picked up from the Specified file.

Note In case of Image Service Library, user can specify any of the source types whereas for Content Services Library only **File** option can be selected.

Document Source Configuration of IDL with source type as Queue

The screenshot shows a configuration window for 'Source Type'. The 'Queue' radio button is selected and circled in red. Below it is a 'File Name' field with a browse button. A checked 'Modify Configured Queue' checkbox is present. Underneath, a checked 'Queue(s) Configured for a Document Class' checkbox is shown. Three dropdown menus are visible: 'FileNET Workspace' (IDL), 'FileNET Queue Name' (Q1), and 'Document Class' (Account). To the right of these dropdowns are 'Add' and 'Delete' buttons.

Modify Configured Queue: Check this option to configure new queues and to delete existing configured queues. To configure a queue, select Workspace name, Queue Name and Document Class name. (Document class can be selected only when 'Queue(s) configured for a document class" checkbox is checked).

Queue(s) Configured for a Document Class: Select this check box to configure queue for a document class. Select document class name from the document class drop down. When a queue is configured for a document class Link Rule processing is done for the specified document class otherwise for each document id name of the document class is picked from FileNET and then link rules are processed. Performance gain can be achieved by Configuring Queues for a Document Class

FileNET Workspace: Specify IDM workspace that contains input queues.

FileNET Queue Name: Specify IDM queue that contains document to be processed. Multiple Queues can be configured for parallel document processing. Queue(s) can be configured for a single or multiple document classes

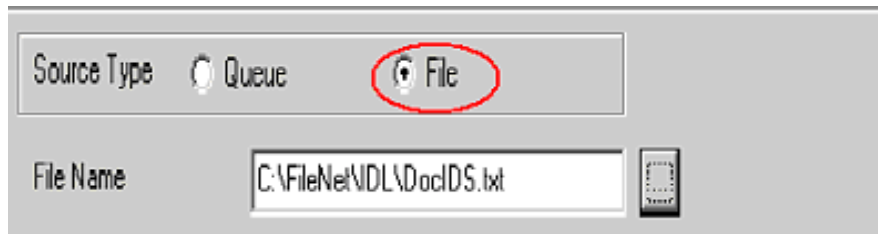
Document Class: Document Class name for which the Queue is configured. This field is mandatory if **Queues Configured For DocClass** checkbox is checked.

To add queues click on **Add**. When this button is clicked, selected combination of Workspace, Queue and Document Class will be added to grid

To delete a queue, select the queue from the grid and click on **Delete** button. Selected entries will be deleted from the grid.

Note Queues can be created and maintained using FileNET Queue maintenance tool.

Document Source Configuration of IDL with source type as File



The screenshot shows a configuration window with a 'Source Type' section containing three radio buttons: 'Queue', 'File', and 'File'. The 'File' radio button is selected and circled in red. Below this, there is a 'File Name' field with the text 'C:\FileNet\NDL\DocID5.txt' and a browse button to its right.

File Name: Specify Path of the File, which contains Doc Ids of the documents to be processed. This can either be selected by clicking the browse button or by entering the absolute path.

Sample format of the file is given in [Appendix A](#).

To save the configuration, Click on **Apply** button.

Click on **Close** button to exit from the application.

5

Database Configuration

User must configure Link Rules for IDL before using IDL 3.0 application. Link rules are configured using CIS 3.0 database configuration tool.

Based on matching rules defined in the LinkRules table of the CIS database, the Inbound Document Linker matches the properties of a FileNET document to the properties of Siebel records.

Accessing CIS 3.0 Database Configuration tool

Navigate from windows explorer to Start -> Programs->FileNET CRM Integration Suite 3.0-> Configuration Tool

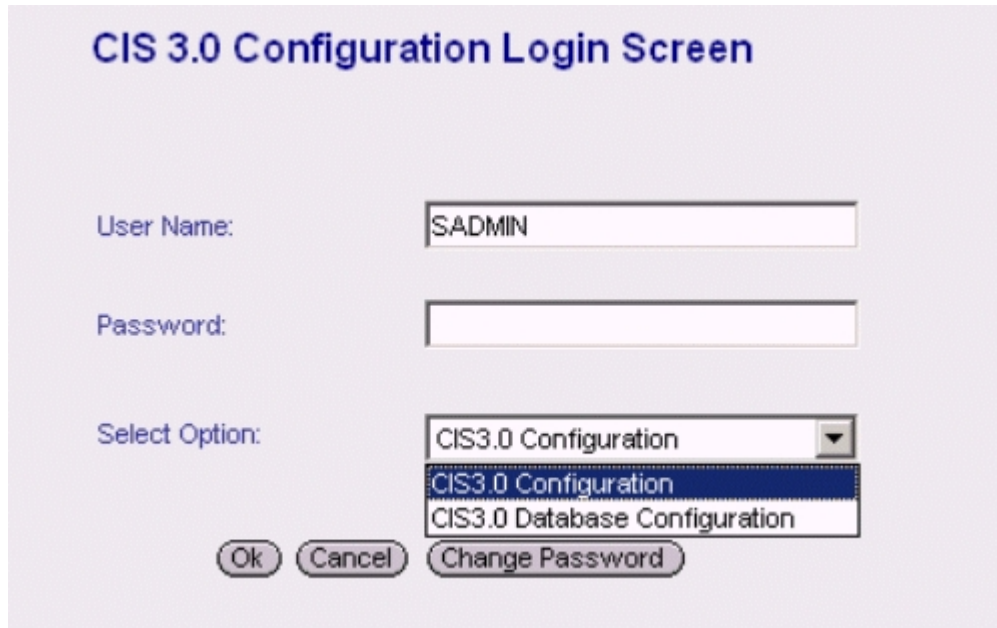
Or

Opening URL <http://<OpenClientServerName>/<OpenClientAlias name>/CIS> from your web browser

CIS 3.0 Configuration Logon Screen appears.

Database configuration tool can be accessed from CIS 3.0 configuration logon screen by selecting **CIS 3.0 Database Configuration** option from **Select option** drop down.

Logon to configuration tool



CIS 3.0 Configuration Login Screen

User Name:

Password:

Select Option:

Enter valid logon credential and select CISS 3.0 Database configuration option in **Select Option** drop down and click on **Ok** button. Following screen will appear.

Select Options:
 Map FileNET with Siebel Fields

Select Library: Select Document Class: Select Document Class Field:

Select Business Component: Select Siebel Field:

Library	Document Class	Business Component	Document Class Field	Siebel Field	
Fn-Test	Account	Account	Account	Name	Delete
Fn-Test	Account	Account	Phone	Main Phone Number	Delete
Fn-Test	Account	Service Request	Account	Account	Delete
Fn-Test	Account	Service Request	SR Number	SR Number	Delete
Fn-Test	Service	Account	Account	Name	Delete
Fn-Test	Service	Service Request	Account	Account	Delete
Fn-Test	Service	Service Request	ClosedDate	Closed Date	Delete
Fn-Test	Service	Service Request	SRNumber	SR Number	Delete
MGSERV	Account	Account	Account	Name	Delete
MGSERV	Account	Account	AccountType	Location	Delete
MGSERV	Service	Account	Account	Location	Delete
MGSERV	Service	Service Request	Account	Account	Delete
MGSERV	Service	Service Request	ClosedDate	Closed Date	Delete
MGSERV	Service	Service Request	SRNumberLabel	SR Number	Delete

Configuring LinkRules for IDL

To configure Link Rules for IDL 3.0 application, select **Configure Link Rules for IDL** option from **Select option** drop down. Following screen will appear.

Select Option:
 Configure LinkRules for IDL

Select Library: Select Document Class: Select Document Class Field:

Select Business Component: Select Siebel Field:

RuleID: UserExit Data: Action: Mandatory Create Activity

Library	Document Class	Document Class Field	Business Component	Siebel Field	RuleID	UserExit Data	Action	Mandatory	Create Activity		
IMOSERV	Account	Account	Account	Name			Link	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Modify	Del
IMOSERV	Account	City	Account	City	1	ABC	UserExit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Modify	Del

This screen shows existing configured Link Rules in the list view.

To configure Link Rules for IDL, follow these instructions.

- Select FileNET Library from **Select Library** drop down.
- Select Document class for which rule is to be configured, from **Select Document Class** drop down.
- Select Document class field, from **Select Document Class Field** drop down. This drop down contains all fields pertaining to the selected Document class.
- Select Business component name from **Select Business Component** drop down.
- Select Siebel Field name from **Select Siebel Field** drop down.
- Enter Rule Id.
- Select Action from **Action** drop down. It can be Link or User Exit.
- Enter User Exit data if action selected is User Exit.
- Check **Mandatory** check box to make the Document Class field mandatory for matching process.
- Select **Create Activity** check box to create a new Siebel Activity Record.
- Click on **Add** button. A rule will be created for selected library, document class, document class field, Business Component and Siebel field and will get added into the data grid.
- To delete a configured Rule from CIS database, select respective row from the data grid and click on **Delete** Link. Selected row will be deleted from the data grid

To go back to CIS 3.0 Configuration Tool Home page, click on **Logoff** button.

Appendix A

Sample Format of Input file

Doclds.txt File contains Doc IDs separated by new line character as shown below

100001

100002

100003

Appendix B – Software License Agreement

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