

# Getting started with Open Client

Open Client is an optional addition to FileNet Web Services. Without downloading or installing any FileNet software, Open Client users can access documents in Image Services (IS) and Content Services (CS) libraries through a web browser. A user can view a retrieved document in these ways:

- In the document's registered application, if the application is installed on the workstation.
- In the browser (for example, using the Acrobat Reader plug-in to view PDF documents).
- In the IDM Viewer. The administrator must enable the IDM Viewer using a site preference, and the user must download and install the viewer.
- In the Java Viewer. The administrator must enable the Java Viewer using a site preference. No download is necessary.

Open Client was developed using Microsoft's .NET technology.

# About this Help

The Open Client Administrator's Help supplements the FileNet Web Services Administrator's Help and provides instructions on installing, configuring, and troubleshooting Open Client. It includes information on Process and eForms integration.

For general information on FileNet Web Services administration, such as adding libraries, setting FileNet Web Services preferences, setting up LDAP login, and defining stored searches, see the FileNet Web Services Administrator's Help.

# What's new in this release?

The 3.3 release introduces the following features and changes:

- You must have Administrator privileges to install or remove FileNet software and software components. All other operations require only Restricted or Limited User privileges.
- To set up Open Client with Process 5.0 Integration, you must install the Process Process Connectivity Bundle.
- To set up Open Client with Process 5.1 Integration, you must install Process Java Applets and Connectivity (PJAC).
- You can set up [LDAP login](#) through iPlanet, Microsoft Active Directory, and Novell Directory Service (NDS) servers.
- You can set up [unified Logon](#) (support added in Open Client 3.2, patch 3).
- You can install FileNet Web Services and Open Client Windows 2000 and XP workstations with IIS 5.0 for development and demonstration purposes only.
- Users can run Open Client via [Terminal Services](#).
- Open Client supports [eForms for Open Client 5.1](#)
- You can set the following new preferences:
  - [Execute stored search on open](#)
  - [Change expired IS password](#)
  - [Default web mode](#) (choose Browse or Search as the start page)
  - [Auto save annotations](#)
  - [Cache duration](#)
  - [Enable folder content caching](#)
  - [Deselect on page change](#) (discard selection information when leaving a page)
  - [Clear custom properties on document class change](#)
  - [Maximum CVL elements to retrieve](#)
  - [Display ID column](#) (show or hide document ID column)
  - [Display property columns configured for FileNet Web Services](#)
  - For Process, [Update queue after processing step](#)
  - For Process, [User list cache refresh rate](#)
  - For Process, [Documentation server \(URL\)](#)
- You can [configure the property columns](#) that users will see on a Browse page list view using FileNet Neighborhood on the web server.

# About Open Client installation

Installing Open Client involves running the Open Client Setup program from the software CD, specifying physical and virtual directories for web documents (the virtual directory is part of the URL), selecting the components to install, and allowing Setup to copy the software to the web server. You must have Administrator privileges to install Open Client.

Following installation, you must configure the software.

Silent installation and maintenance options are provided.

## **Note**

The first time a user accesses an Open Client page, .NET compiles the page into machine language. Subsequently, this compilation occurs each time the web service restarts.

# Open Client requirements

## Web server requirements

Open Client server and client requirements are published in the [IDM Desktop, Web Services, and Open Client Compatibility and Dependency](#) document. This document is commonly called the compatibility matrix. It is posted on the FileNet CSS web site when the software is released and updated as changes occur (for example, when third-party service packs are certified). Additional requirements for Process Integration with Open Client are published in the [Process Compatibility & Dependency](#) document on the FileNet CSS web site.

## Web client requirements

Open Client provides a no-download web client based on .NET technology. The Open Client includes two viewers:

- The IDM Viewer, which requires a user download.
- The Java Viewer, which requires the workstation to have either (any version of) the Java Runtime Environment (JRE) or the Microsoft Java Virtual Machine (JVM). Note that Process Integration has specific JRE version requirements. If necessary, JRE 1.4.0 is automatically installed on a workstation the first time a user runs a Process Java applet, such as Process Designer, from the Open Client Process page. If you are not using Open Client with Process Integration, you must obtain a JRE from the [Sun web site](#) or another location. If you plan to add Process Integration at a later time, we recommend that you install JRE 1.4.0 on the workstations. TIP To download JRE 1.40 from the Sun web site, go to the "Archive releases" page. The JVM can be downloaded from FileNet's FTP site. See the readme file for details.

## Web client requirements for Process Integration

Before running a Process Java applet on a web client, FileNet recommends installing a supported version of the Java Runtime Environment (JRE) on the client. To see if a supported version of the JRE is installed, go to Start, Settings, Control Panel, Java Plug-In. The JRE 1.4.0 setup package is available on the web server in the `..\FileNet\IDM\Web\FnOpenClient\Process\Download` directory.

A web client cannot run multiple versions of the JRE. Any version other than the one used for Process integration must be uninstalled before accessing a Process applet.

## JRE for Process 5.0 Integration

Process 5.0 requires either JRE 1.3.1 or 1.4.0. Other JRE versions are not supported.

- If JRE 1.3.1 exists, no actions are required prior to accessing the Process 5.0 applets.
- If JRE 1.4.0 exists, the Internet Explorer option on the Java Plug-In\Browser tab must be unselected (not checked) prior to accessing the Process applets.
- If no JRE exists and the client is using Internet Explorer, JRE 1.4.0 will be downloaded automatically when the user first attempts an operation that requires the JRE.
- If no JRE exists and the client is using Netscape, either JRE 1.3.1 or 1.4.0 must be installed before accessing a Process applet. If you are using Netscape 6, make sure the Netscape option is selected.

## JRE for Process 5.1 Integration

Process 5.1 requires JRE 1.4.0. Other JRE versions are not supported.

- If JRE 1.4.0 exists, the Internet Explorer option on the Java Plug-In\Browser tab must be unselected (not checked) prior to accessing the Process applets.
- If no JRE exists and the client is using Internet Explorer, JRE 1.4.0 will be downloaded automatically when the

user first attempts an operation that requires the JRE.

- If no JRE exists and the client is using Netscape, the 1.4.0 must be installed before accessing a Process applet. If you are using Netscape 6, make sure the Netscape option is selected.

# What Setup installs

During Open Client installation, you have a choice of a Typical installation, a Complete installation, or a Custom installation. All options include the Java Viewer.

## **Typical installation**

For a typical installation, Setup installs Open Client.

## **Complete installation**

For a complete installation, Setup installs Open Client and Process Integration.

## **Custom installation**

With a custom installation, Setup allows you to select the components to install.

# Install Open Client

You install Open Client from the FileNet Web Services software CD. You enter:

- The destination location for the Open Client software (you can accept the default, or specify a path).
- The virtual directory, which is the name of the web site in the Open Client's URL.

## To install Open Client (without Process integration)

1. Log on as a user who has Administrator privileges to the machine.
2. Insert the CD.
3. Open the Open Client ZipExe folder.
4. Run setup.exe.
5. Choose **Typical**.
6. Follow the prompts to complete the installation.

If you have installed a previous version, and you see the message below, choose Yes:

"The file C:\WINNT\Downloaded Installations\FileNet Open Client.msi already exists.  
Would you like to replace it?"

7. When prompted that the Open Client installation has finished, reboot the machine.
8. For Windows 2003 only, register the Java Viewer MIME type.
  - a. In IIS Manager, right-click on the computer name, and choose **Properties**.
  - b. Click the **MIME Types** button.
  - c. Enter the extension v1, the name JavaViewer, and then click **OK**.
9. [Verify the installation](#).



# Upgrade Open Client

The Setup program does not perform upgrades of Open Client. To upgrade Open Client from 3.2 to 3.3, you will save customizations, uninstall all FileNet software from the web server, upgrade third-party software as needed, install the 3.3 release, and then reinstate your customizations.

## Upgrade Open Client

1. Back up all customizations.
2. If you are using a Windows 2000 server, install any required service pack.
3. Upgrade .NET Framework to a supported version.
4. If you are using Process for Open Client, upgrade the JRE to a supported version.
5. [Uninstall Open Client](#) and any integrations.
6. Uninstall Web Services using the procedure in the FileNet Web Services Administrator's Help.
7. Install FileNet Web Services 3.3.
8. Install Open Client 3.3 using one of the following procedures:
  - [Install Open Client](#)
  - [Install Open Client with Process 5.0 Integration](#)
  - [Install Open Client with Process 5.1 Integration](#)
9. Restore code customizations and recompile. See *Upgrading a Customized Application* in the topic "Best Practices for Customization" in the Open Client Developer's Guide.

# Verify Open Client installation

When Open Client software installation is complete, use these steps to verify the installation.

## To verify Open Client installation

1. Open the Internet Services Manager. From the Windows **Start** menu, select **Programs > Administrative Tools > Internet Service Manager**.
2. Expand the Internet Information Server tree so that you can see your web server's "Default Web Site."
3. Verify that the virtual directory you created during setup exists.
4. Using a browser, access your web site from another computer to confirm that it is working. For example, <http://<webservername>/<virtual directory>>.
5. Access each page to complete the .NET just-in-time compilation.

# Setup log file

The Setup program records installation information in opclient.log. Setup places the log file in your WINNT directory.

You can use opclient.log to verify and troubleshoot an installation. If you need to contact FileNet customer support, the representative may ask for the opclient.log file for reference.

The log file contains the following information:

- The date and time the installation started and finished
- Information on the computer on which Open Client is installed, such as operating system and version, video card and monitor resolution, memory, system directory path, and disk drives
- Setup program activity
- A list of the components that Setup successfully installed
- Any errors or warnings

# Quiet installation

A quiet installation suppresses messages and requires no user input. To install Open Client in quiet mode, create a recording session, then run the setup in silent mode.

## To create a recording session

1. From the command line, enter the following, where /r indicates recording mode and /f1 indicates the name of the recording session file:

```
setup /r /f1"<filespec>"
```

For example, `setup /r /f1"c:\sessions\setup.iss"`

**Note:** The quotation marks are required.

2. Run the installation procedure.
3. You may also want to create an uninstall session. To create an uninstall session, use the same format. For example,

```
setup /r /f1"c:\sessions\uninstall.iss"
```

When this finishes, a maintenance menu is displayed. Select **Uninstall**.

## To run setup in quiet mode

On a machine on which Open Client has not been installed, enter the following on the command line, where /s indicates silent (quiet) mode:

```
setup /s /f1"<filespec>"
```

For example, `setup /s /f1"c:\sessions\setup.iss"`

**Note:** The quotation marks are required.

When Setup runs in silent mode, the Setup icon appears on the Task bar. This is the only indication that the install is running. No messages or dialog boxes appear.

# Repair Open Client

Repair re-installs Open Client based on the settings used when it was first installed.

## To repair Open Client

1. Select **Add/Remove Programs** from the Control Panel.
2. Select **FileNet Open Client**.
3. Click the **Change/Remove** button. The Maintenance Wizard appears.
4. Select **Repair** and follow the prompts to refresh the Open Client software from the installer's database.

# Install Open Client with Process 5.0 Integration

You will install FileNet Web Services, Microsoft's .NET Framework, Open Client with Process Integration, and the Process Connectivity Bundle.

We recommend that you accept all default paths.

## Log on

1. Log on to the web server as a user who has Administrator privileges. Be sure to use this same user account to log on after each required reboot in the procedure.

## Install FileNet Web Services

2. Install FileNet Web Services using the procedure in the FileNet Web Services Administrator's Help.

## Install .NET Framework

3. From the Microsoft web site, download a supported version of .NET Framework.
4. Install .NET Framework.

## Install Open Client with Process Integration

5. Insert the FileNet Web Services software CD in the CD-ROM drive. Exit from Setup if it starts automatically.
6. On the CD, open the `\Open Client ExeZip` folder, and double-click on `setup.exe`.
7. Click **Next**.
8. Click **Yes** to accept the license agreement.
9. Select "Anyone who uses this computer" to allow all users on this machine to administer Open Client, and then click **Next**. Select "For myself only" if you want to be the only user on this machine who can administer Open Client, and then click **Next**. This setting has no effect on web client access to Open Client and Process.
10. Accept the default installation folder, or click **Browse** to select a folder other than the default, and then click **Next**.
11. Enter the alias (IIS virtual directory) for Open Client. This becomes part of the URL used to access Open Client. For example, if you enter the alias `OpenClient`, the URL will be `http://<webserver>/OpenClient`.
12. Select **Complete** or **Custom** to install Open Client with Process Integration.
13. Click **Next**.
14. Reboot the machine to complete the installation.
15. For Windows 2003 only, register the Java Viewer MIME type.
  - a. In IIS Manager, right-click on the computer name, and choose **Properties**.
  - b. Click the **MIME Types** button.
  - c. Enter the extension `v1`, the name `JavaViewer`, and then click **OK**.

## Install the Process Connectivity Bundle

15. Install the Process Connectivity Bundle using the procedure [Installing the Process Connectivity Bundle](#) posted on the CSS web site.

# Install Open Client with Process 5.1 Integration

You must install FileNet Web Services, .NET Framework, Open Client with Process Integration, and Process Java Applets and Connectivity (PJAC) 5.1.

## Log on

1. Log on to the web server as a user who has Administrator privileges. Be sure to use this same user account to log on after each required reboot in the procedure.

## Install FileNet Web Services

2. If you have not already done so, install FileNet Web Services using the procedure in the FileNet Web Services Administrator's Help.

## Install .NET Framework

3. From the Microsoft web site, download a supported version of .NET Framework.
4. Install .NET Framework.

## Install Open Client with Process Integration

5. Insert the FileNet Web Services software CD in the CD-ROM drive. Exit from Setup if it starts automatically.
6. On the CD, open the \Open Client ExeZip folder, and double-click on setup.exe.
7. Click **Next**.
8. Click **Yes** to accept the license agreement.
9. Select "Anyone who uses this computer" to allow all users on this machine to administer Open Client, and then click **Next**. Select "For myself only" if you want to be the only user on this machine who can administer Open Client, and then click **Next**. This setting has no effect on web client access to Open Client and Process.
10. Accept the default installation folder, or click **Browse** to select a folder other than the default, and then click **Next**.
11. Enter the alias (IIS virtual directory) for Open Client. This becomes part of the URL used to access Open Client. For example, if you enter the alias OpenClient, the URL will be `http://<webserver>/OpenClient`.
12. Select **Complete** or **Custom** to install Open Client with Process Integration.
13. Click **Next**.
14. Reboot the machine to complete the installation.
15. For Windows 2003 only, register the Java Viewer MIME type.
  - a. In IIS Manager, right-click on the computer name, and choose **Properties**.
  - b. Click the **MIME Types** button.
  - c. Enter the extension v1, the name JavaViewer, and then click **OK**.

## Install Java Applets and Connectivity (PJAC)

16. Install PJAC 5.1 from the PJAC 5.1 CD.

The installation copies JRE 1.4.0 to the \download folder on the web server. A client workstation must have JRE 1.4.0 to run Process Java applets, and cannot have any additional version installed. If the JRE is not installed when the user starts a Process Java applet:

- For clients running Internet Explorer, the software automatically installs JRE 1.4.0.

- For clients running Netscape, the software prompts the user to install JRE 1.4.0.

Alternatively, you can install the JRE on client machines from the PJAC CD, make the JRE available to clients from a network drive, or instruct clients to download the JRE from another location. See [Open Client requirements](#) for more information on web client setup.



# Add or remove Process Integration

You use the Open Client Setup program to install Process Integration and then you must also install either the 5.0 Process Connectivity Bundle or 5.1 Process Java Applets and Connectivity (PJAC). You can install Process Integration along with Open Client, or add Process Integration at a later time using **Add/Remove Programs**. You can also use **Add/Remove Programs** to uninstall Process Integration.

## To add Process Integration to Open Client

1. Verify that you have Open Client and either the 5.0 Process Connectivity Bundle or 5.1 PJAC installed.
2. Select **Add/Remove Programs** from the Control Panel.
3. Select **FileNet Open Client**.
4. Click the **Change/Remove** button. The Maintenance Wizard appears.
5. Select **Modify** and follow the prompts to add Process Integration to Open Client.
6. If you have previously compiled the Open Client project without Process Integration installed, recompile the project.
7. Apply the latest Open Client and Process hot fix packs.

If you have already applied the latest Open Client hot fix pack, it is not necessary to reapply it after adding Process Integration.

## To remove Process Integration from Open Client

1. Select **Add/Remove Programs** from the Control Panel.
2. Select **FileNet Open Client**.
3. Click the **Change/Remove** button. The Maintenance Wizard appears.
4. Select **Modify** and follow the prompts to remove Process Integration.
5. Optionally, uninstall PJAC using the instructions in the *Process for FileNet P8 Image Manager Installation Guide* or [uninstall the Process Connectivity Bundle](#).

# Uninstall Open Client

We recommend that you uninstall software in the following order (reversing the order of installation):

1. Process applets and connectivity (either the 5.0 Process Connectivity Bundle or PJAC 5.1)
2. Open Client
3. FileNet Web Services

## To uninstall Open Client

1. [Uninstall the 5.0 Process Connectivity Bundle](#) or uninstall PJAC 5.1 using the instructions in the *Process for FileNet P8 Image Manager Installation Guide*.
2. Remove Process Integration for Open Client if it was installed.
3. Select **Add/Remove Programs** from the Control Panel.
4. Select **FileNet Open Client**.
5. Click the **Change/Remove** button. The Maintenance Wizard appears.
6. Select **Remove** and follow the prompts to uninstall Open Client.

**NOTE** If an error occurs telling you that the Open Client folder can't be deleted, reboot the server and go back to step 3.

7. Remove FileNet Web Services using the procedure in the FileNet Web Services Administrator's Help.
8. Optionally, remove the ODBC Data Sources if you will not use them to access CS libraries after the installation.

### Note

The Uninstall Wizard removes all Open Client components but does not remove the Java Runtime Environment (JRE). You can uninstall the JRE using Add/Remove from the Control Panel.

# About Open Client configuration

Open Client configuration consists of:

- Using IDM Configure to set the FileNet Web Services site preferences that apply to Open Client. These preferences are stored in the registry.
- Setting additional preferences for Open Client. These preferences are stored in SitePreferences.xml, which resides in the \Preferences subdirectory of the Open Client installation directory (by default, C:\FileNet\IDM\Web\FNOpenClient).
- Optionally, using FileNet Neighborhood to define the property columns that appear in Open Client.
- Modifying the web.config file, which resides in the Open Client installation directory, to [set the maximum size of a file you can add to a library](#).
- Modifying the machine.config file, a Microsoft .NET Framework configuration file, which resides in the .NET Framework installation directory.

Open Client users see all libraries configured for FileNet Web Services. All other preference settings are optional. Preferences and other configuration settings apply to all users who access the Open Client site.

See the FileNet Web Services Administrator's Help for information on adding libraries and setting preferences.

# Authentications options

FileNet Web Services and Open Client support the same authentication methods: default logon, unified logon, and LDAP logon. For details and procedures related to authentication:

- See the topic "Authentication options" in the FileNet Web Services Administrator's Help.
- See the topic "About Authentication" in the IIS 5.0 Help.

# Configure the folder view

You can configure the folder view visible to Open Client users by specifying the number of rows or columns that are displayed.

## To set the number of rows displayed

1. From a text or XML editor, open the SitePreferences.xml file, located in the Preferences subdirectory of your Open Client installation directory.
2. Locate the following XML section and replace the parameter, shown in boldface in the example below, with the new value:

```
<setting name="NumberOfRows"
  label="Number of Rows"
  description="Number of Rows">
  <value default="10" type="integer">7</value>
  <uiType>TextBox</uiType>
  <minimum>1</minimum>
  <maximum>30</maximum>
  <visible>true</visible>
</setting>
```

## To set the number of columns displayed

1. From a text or XML editor, open the SitePreferences.xml file, located in the Preferences subdirectory of your Open Client installation directory.
2. Locate the following XML section and replace the parameter, shown in boldface in the example below, with the new parameter:

```
<setting name="NumberOfColumns"
  label="Number Of Columns"
  description="Number of columns">
  <value default="10" type="integer">4</value>
  <uiType>TextBox</uiType>
  <minimum>1</minimum>
  <maximum>30</maximum>
  <visible>true</visible>
</setting>
```

# Set up searches for Open Client users

By default, a predefined search, called Simple Search, is available to FileNet Web Services and Open Client users. As the administrator, you can modify or delete Simple Search and create additional searches using the IDM Find application, which is installed on the web server with FileNet Web Services. See "Save a stored search" and "Save a search template" in the IDM Desktop User's Help for information on creating and saving searches using IDM Find. Go to Start>Programs>FileNet IDM to start IDM Find and the IDM Desktop User's Help.

A search appears on Open Client's Search page when it is saved in a particular folder in the local search path on the web server. The default local search path for Open Client is the installation folder, C:\FileNet\IDM or equivalent. Searches stored in this path are available to users of both Open Client and FileNet Web Services. See "Create stored searches and search templates" in the FileNet Web Services Administrator's Help for information on making searches available to FileNet Web Services Clients. You can share searches with FileNet Web Services clients by using the default local search path or you can [set an Open Client site preference to establish a different local search path for Open Client searches](#) .

When you add a library, IDM Configure creates an \IS or \CS folder, if the folder doesn't already exist, and a folder for the library.

Folder path and name	Contains searches available to users while logged on to...
<local search path>\IS	Any IS library
<local search path>\CS	Any CS library
<local search path>\IS\Default IMS <IS library> FileNet	<IS library>
<local search path>\CS\<CS library> <host>	<CS library>

For example, if you install both FileNet Web Services and Open Client to the default locations, then add an IS library CorpIS and a CS library CorpCS, IDM Configure creates the folders listed below:

- C:\FileNet\IDM\IS
- C:\FileNet\IDM\IS\DefaultIMS CorpIS FileNet
- C:\FileNet\IDM\CS
- C:\FileNet\IDM\IS\CorpCS <host server>

If you change the default search path for Open Client, you will have to create these folders in that path.

The colons that normally separate the three parts of an IS library's name are replaced in the folder name by spaces. Similarly, the caret (^) that typically separates the two parts of a CS library's name are replaced in the folder name by a space, as in CorpCS LibServer.

# Enable adding large documents

By default, four megabytes is the largest file that a user can add to a library. To allow users to add documents larger than four megabytes, you can specify another maximum size, up to two gigabytes.

## To enable adding large documents

1. Open the web.config file, which is located in the Open Client installation directory, in a text or XML editor.
2. In the <system.web> section, add a line with a maxRequestLength value to override the default, and save the file. For example, to allow files up to eight megabytes, add the following line:

```
<httpRuntime maxRequestLength="8192" />
```

For more information see <http://support.microsoft.com/default.aspx?scid=kb;en-us;Q295626>.

# Set memory limit

If the ASPNET\_WP process restarts due to heavy usage, you can change the memory limit to extend the longevity of the process. The memory limit specifies the maximum memory size, as a percentage of total system memory, that a process can consume before ASP.NET launches a new process and reassigns existing requests. By default, this parameter is set to 60%. This means that once the web server uses 60% of the physical memory, the ASPNET\_WP process restarts with more available memory. If you increase the memory limit, the recommended maximum value is 80%.

## To set the memory limit

1. From a text or XML editor, open the machine.config file, which is located in .NET Framework installation directory.
2. Locate the <processModel> section and change the memory limit value, shown in boldface in the example below, with a new value:

```
<processModel enable="true"
  timeout="Infinite" idleTimeout="Infinite"
  shutdownTimeout="0:00:05"
  requestLimit="Infinite" requestQueueLimit="5000"
  restartQueueLimit="10" memoryLimit="60"
  webGarden="false"
  cpuMask="0xffffffff" userName="machine"
  password="AutoGenerate"
  logLevel="Errors" clientConnectedCheck="0:00:05"
  comAuthenticationLevel="Connect"
  comImpersonationLevel="Impersonate"
  responseRestartDeadlockInterval="00:09:00"
  responseDeadlockInterval="00:03:00"
  maxWorkerThreads="25" maxIoThreads="25"/>
```



# Terminal Services

Users can access Open Client and the Java Viewer via Microsoft Terminal Services. Users cannot run the IDM Viewer via Terminal Services nor can they use FileNet Web Services Application Integration. For a more detailed discussion, ask your FileNet representative for the Technical Brief titled "FileNet Open Client Support of Microsoft Windows Terminal Services" (available on FileNet's internal eXtra site).

To run the Java Viewer via Terminal Services, the site administrator must add the following code to the FnOpenClient project and recompile. Failure to make these changes can lead to Java Viewer image and annotation cache contention.

## To modify code to use Java Viewer via Terminal Services

1. In the second JavaScript block of the **fnjavaview.aspx** page add the following Java script:

```
document.write('<param name="CachePath" value="<%=getCachePath()%>">');
```

2. In the FnJavaView class of the **fnjavaview.aspx.vb** file, add the following function. Please note that the aCachePath string value can contain a directory path of the administrator's choosing. The current user's login name is appended to the end of this directory path so that it has a unique value for each user.

```
' Public Function getCachePath()  
  
' Purpose: Gets a cache path name to use as the alternate Java Viewer cache  
path. Note the following:  
  
    -A forward slash must be used for directory separators.  
  
    -The ' cachePath parameter is recognized only on Windows platforms.  
  
' Parameters: None  
  
' Throws: None  
  
Public Function getCachePath() As String  
  
Dim aCachePath As String  
  
aCachePath = "c:/CACHE_DIRECTORY_STRUCTURE_OF_CHOICE_HERE/" + getUserId()  
  
Return aCachePath  
  
End Function
```

# Configure viewers

Open Client installation makes both the IDM Viewer and the Java Viewer available in the client interface by default. You can:

- Enable or disable the Java Viewer
- Configure the Java Viewer Magnifier to remain open
- Enable or disable the IDM Viewer

# Enable or disable viewers

When Open Client is installed, both the IDM Viewer and Java Viewer are available in the client interface by default. The IDM Viewer must be manually downloaded to each client. If a user selects the IDM Viewer and it is not yet installed, download instructions are displayed.

- If you have not installed Process Integration, you can enable one or both of the viewers.
- If you have installed Process Integration, you can use only one viewer. If both viewers are enabled in the preferences file, Java applets use the IDM Viewer.

**Note:** You must restart the Open Client application for this change to go into effect. Also, client users will not see the change until they start a new browser session.

## To enable or disable a viewer

1. From a text or XML editor, open the SitePreferences.xml file, located in the Preferences subdirectory of your Open Client installation directory.
2. Locate the parameter value, shown in boldface in the example below, for the viewer you want to enable or disable, and change it to "False" to disable or "True" to enable:

```
<subsystem name="Viewing" label="Viewing"
  description="Viewing"
  visible="true">
  <category name="IDMViewer" label=" IDM Viewer"
    description="IDM Viewer"
    visible="true">
    <setting name="IsEnabled"
      label="Is IDM Viewer enabled"
      description="Is IDM Viewer enabled">
      <value default="True" type="string">True</value>
      <options>
        <option label="True">True</option>
        <option label="False">False</option>
      </options>
      <uiType>DropDownList</uiType>
      <minimum>
      </minimum>
      <maximum>
      </maximum>
      <visible>>true</visible>
    </setting>
  </category>
  <category name="JavaViewer"
    label=" Java Viewer"
    description="Java Viewer" visible="true">
    <setting name="IsEnabled"
      label="Is Java Viewer enabled"
      description="Is Java Viewer enabled">
      <value default="True" type="string">True</value>
      <options>
        <option label="True">True</option>
        <option label="False">False</option>
      </options>
      <uiType>DropDownList</uiType>
      <minimum>
      </minimum>
      <maximum>
      </maximum>
      <visible>>true</visible>
    </setting>
  </category>
</subsystem>
```



# Configure the Java Viewer Magnifier

You can configure the Java Viewer Magnifier to:

- Open in a window external to the document window
- Remain open when additional documents are opened

## To configure the Magnifier to open in an external window

1. Open the fnjavaview.aspx file.
2. Add the following line in the section where JavaScript document calls are made:

```
<PARAM NAME="externalMagnifier" value="true">
```

The default mode is "false". In the default mode, the Magnifier window appears within the display area when a user clicks the Magnifier button.

## To configure the Magnifier to remain open

1. Open the fnjavaview.aspx file.
2. Add the following line in the section where JavaScript document calls are made:

```
<PARAM NAME="magnifierPersistent" value="true">
```

When this parameter is set to "true", the Magnifier window reappears in its last form (same size, position, and magnitude) when the user opens a new document. The default mode is "false," which hides the Magnifier window when the user opens a new document, requiring the user to manually display it each time. If users repeatedly magnify the same image area in a set of documents, set this parameter to "true" to keep the Magnifier window open while paging through images.

# Set up Process

After installing Process for Open Client, you must complete the following tasks to enable Process activity:

- Start Process Services on the workflow server if it is not already running. For more information, see "Starting and stopping Process Service" in the Help for Task Manager.
- Start the Pooled Process Manager (PPM) on the Process Engine. For more information, see "About the Pooled Process Manager (PPM)" in the Help for PPM Administrators.
- Start one or more routers on the web server. For more information, see "About the Process Router" in the Help for Task Manager.
- For each router you started, initialize the corresponding isolated region. For more information, see "Initialize an isolated region" in the Help for Process Configuration Console.

The Process preferences allow you to:

- Specify the milestone level visible to workflow participants
- Designate the default router that users access when logging in to the workflow server
- Designate the default RMI port on which routers run
- Make routers running on additional RMI ports available to users at workflow server login

In addition, you can use various configuration options within Process to customize your Process application. For example, you can set up email notification of workflow activity or enable automatic workflow launching. For details see "About Configuration" in Help for Process Administrators. You can also create work queues to hold work that can be completed by one of multiple users rather than by a specific user. See "Configuring work and user queues" in Help for Process Configuration Console for details.

Be sure to also set the Documentation server preference to enable access to the Help for Process.

# eForms integration

eForms is an optional add-on to FileNet Web Services. Installation of eForms creates a new Open Client preference "IS EFORMS INSTALLED" in the new eForms preference subsystem.

- When the preference is set to True (the default when installed), Open Client opens eForms documents in the eForms application.
- When the preference is set to False, eForms documents open in the workstation's registered application for XML files. Typically, opening an XML file displays raw XML in the browser.

Uninstalling the eForms software removes the preference.

# Set site preferences

Site preferences come from two places:

- Some [FileNet Web Services preferences](#) affect Open Client. You set these using the IDM Configure application on the web server.
- Additional Open Client preferences are set by editing SitePreferences.xml, which resides in the \Preferences subfolder in the Open Client installation directory.

In the SitePreferences.xml file and in this Help, Open Client preferences are organized into subsystems and categories as shown in the reference table below. Preference changes take effect after restarting the Open Client application.

Subsystems	Categories	Preferences	Values
<b>General</b>			
	Search	<a href="#">Local search path</a> <a href="#">Execute stored search on open</a>	Path Yes or No
	Security	<a href="#">Change expired IS password</a>	Yes or No
	Login	<a href="#">Default web mode</a>	Browse or Search
	Cache Management	<a href="#">Cache duration</a> <a href="#">Enable folder content caching</a>	0 to 60 minutes True or False
<b>User Interface</b>			
	Folder View Settings	<a href="#">Number of rows</a> <a href="#">Number of columns</a>	1 to 30 1 to 30
	List View Settings	<a href="#">Deselect on page change</a>	Yes or No
<b>Documents</b>			
	Properties	<a href="#">Clear custom properties on document class change</a> <a href="#">Maximum number of CVL elements to retrieve</a>	Yes or No 1 to 7500
	List View Settings	<a href="#">Display ID column</a> <a href="#">Display configured columns</a>	Yes or No Yes or No
<b>Process</b>			
	General	<a href="#">Milestone level</a> <a href="#">Update queue after processing step</a> <a href="#">User list cache refresh rate</a>	1 to 99 Yes or No 0-999
	Routers	<a href="#">Default router name</a> <a href="#">Ports</a>	Name of a router Router port numbers
	Installation State	eProcess installation state	True or False
<b>Viewing</b>			
	IDM Viewer		



Java Viewer	Is IDM Viewer enabled	Yes or No
-------------	-----------------------	-----------

	Is Java Viewer enabled	Yes or No
--	------------------------	-----------

	Auto save annotations	Yes or No
--	-----------------------	-----------

**Documentation**

Documenation Server		
---------------------	--	--

	Server URL	URL
--	------------	-----

**eForms**

eForms		
--------	--	--

	Is eForms installed	Yes or No
--	---------------------	-----------

# Supported FileNet Web Services preferences

The following FileNet Web Services preferences apply to Open Client. For a description of each of these preferences, see the Preference Guide in the FileNet Web Services Administrator's Help.

## Add, check in, retrieve

- Checksum new IS document
- Checksum retrieved IS documents
- Use server notification for IS document migration
- IS document migration timeout (seconds)

## Local caching

- Cache directory
- Maximum cache size (MB)
- Maximum cached documents (K)
- Configure NT credentials for cache

## Prefetching

- Prefetch to server cache

## LDAP settings

- Enable LDAP for the whole website
- Server name
- Distinguished name/User principal name
- Port number
- Server type

## IS libraries

- Service
- System type
- Use operating system credentials for login
- Alternate IS page cache

## CS libraries

- Service
- System type
- Use operating system credentials for login
- Active requests per user
- Active requests per guest
- Guest user name
- Enable timeouts

- Active request timeout
- Inactive session timeout
- Inactive user timeout
- Enable direct document access

# Set Open Client site preferences

To set Open Client site preferences, edit SitePreferences.xml. The file resides in the Preferences folder in the Open Client installation directory.

# Is Java Viewer enabled

<b>Preference</b>	Is Java Viewer enabled
<b>Description</b>	Defines whether the Java View is available to users.
<b>How to set</b>	In the <installation_directory> /Preferences/SitePreferences.xml file, edit the Is Java Viewer Enabled value.
<b>Applies to</b>	Open Client
<b>Possible values</b>	True or False. The default is True.
<b>API</b>	No
<b>Exportable</b>	No

**Note:** If Process is installed and a user opens a viewer from within the Java step processor, the Java Viewer is used only if this preference is set to "True" and the "Is IDM Viewer enabled" preference is set to "False". If both viewer preferences are set to "True", the IDM Viewer is used.

# Enable folder content caching

<b>Preference</b>	Enable folder content caching
<b>Description</b>	When set to yes, caches folder content
<b>How to set</b>	In the <installation_directory> /Preferences/SitePreferences.xml file, edit the EnableFolderContentCaching value.
<b>Applies to</b>	Open Client
<b>Possible values</b>	True or False. The default is True.
<b>API</b>	No
<b>Exportable</b>	No

# Change expired IS password

<b>Preference</b>	Changed expired IS password
<b>Description</b>	When set to Yes, allows an IS user to change an expired password.
<b>How to set</b>	In the <installation_directory> /Preferences/SitePreferences.xml file, edit the OpenClientChangeExpiredPassword value.
<b>Applies to</b>	Open Client
<b>Possible values</b>	Yes or No. The default is No.
<b>API</b>	No
<b>Exportable</b>	No

The IS library administrator must configure the user's account to allow changing an expired password.

# Clear custom properties on document class change

## Preference

Clear custom properties on document class change

## Description

When set to yes, Open Client clears custom properties when the user selects a different document class while adding or modifying the properties of a CS document.

## How to set

In the <installation\_directory> /Preferences/SitePreferences.xml file, edit the ClearCustomPropertiesOnDCChanges value.

## Applies to

Open Client

## Possible values

Yes or No. The default is Yes.

## API

No

## Exportable

No

This applies to CS only.



# Display configured columns

<b>Preference</b>	Display configured columns
<b>Description</b>	When set to yes, displays the property columns configured for FileNet Web Services
<b>How to set</b>	In the <installation_directory> /Preferences/SitePreferences.xml file, edit the DisplayConfiguredColumns value.
<b>Applies to</b>	Open Client
<b>Possible values</b>	Yes or No. The default is No.
<b>API</b>	No
<b>Exportable</b>	No

The web administrator can configure property columns for each library using FileNet Neighborhood. These property columns are then displayed for FileNet Web Services clients. See the topic "Customize FileNet Neighborhood" for instructions.

The Open Client administrator can display these configured columns to Open Client users. Note the following:

- If you set this preference to Yes, set the **Display ID column** preference to No. Otherwise, the list view will show two ID columns.
- Open Client does not honor column width or alignment. Columns size themselves to accommodate the longest value and all properties are left-aligned.
- Search results shows the columns configured in the search.
- Open Client document lists do not show document state icons (annotations, checked out, etc.)
- If you set this preference to Yes, but no property columns have been configured for FileNet Web Services clients, the Open Client default columns remain in effect.

# Display ID column

<b>Preference</b>	Display ID column
<b>Description</b>	When set to Yes, shows the document ID in the first column of a list view.
<b>How to set</b>	In the <installation_directory> /Preferences/SitePreferences.xml file, edit the DisplayIdColumn value.
<b>Applies to</b>	Open Client
<b>Possible values</b>	Yes or No
<b>API</b>	No
<b>Exportable</b>	No

Set this preference to No when you enable the **Display configured columns** preference to avoid displaying two ID columns.

# Document preferences

The preferences in the Documents category allow you to:

- Clear custom properties on document class change
- Set the maximum number of CVL elements to retrieve
- Show or hide the document ID column in document lists
- Display the property columns configured for FileNet Web Services

Select a preference from the Contents for more information.

# Documentation server

<b>Preference</b>	Documentation server
<b>Description</b>	Identifies the documentation server for Process Help.
<b>How to set</b>	In the <installation_directory> /Preferences/SitePreferences.xml file, edit the ServerURL value.
<b>Applies to</b>	Open Client with 5.1 Process Integration
<b>Possible values</b>	The value consists of a server name, a forward slash, and a site name (for example, "docserver/ProcessHelp").
<b>API</b>	No
<b>Exportable</b>	No

Process documentation is installed as a web site and accessed via the URL configured using this preference. You can set the URL for the documentation server while installing PJAC or edit SitePreferences.xml at a later time.

# Is eForms installed

<b>Preference</b>	Is eForms installed
<b>Description</b>	Yes when eForms is installed
<b>How to set</b>	Install or uninstall eForms
<b>Applies to</b>	Open Client
<b>Possible values</b>	Yes. When eForms is not installed, the preference does not exist.
<b>API</b>	No
<b>Exportable</b>	No

Installation of eForms creates this preference, and removing eForms deletes the preference.

# Process preferences

Using the Process preferences, you can set the milestone level, specify a default Process router, enter available RMI port numbers for Process routers, and specify the default RMI port. Be sure to also set the Documentation server preference to enable access to the Help for Process.

# Milestone level

<b>Preference</b>	Milestone level
<b>Description</b>	Using the Milestone Level preference, you can set the maximum milestone level to display in open work items and in launched workflows. For example, if the site preference is set to 5, reached milestones of levels 1, 2, 3, 4, and 5 will be visible.
<b>How to set</b>	In the <installation_directory> /Preferences/SitePreferences.xml file, edit the Milestone Level value.
<b>Applies to</b>	Process
<b>Possible values</b>	1-99 Default value: 1
<b>API</b>	No
<b>Exportable</b>	No

Using the Milestone Level preference, you can set the maximum milestone level to display in open work items and in launched workflows. For example, if the site preference is set to 5, reached milestones of levels 1, 2, 3, 4, and 5 will be visible. Acceptable values are between 1 and 99.

## To set the milestone level

1. From a text or XML editor, open the SitePreferences.xml file, located in the Preferences subdirectory of your Open Client installation directory.
2. Locate the following XML section and replace the milestone value, shown in boldface in the example below, with the new value:

```
<setting name="MilestoneLevel" label="Milestone Level"
  description="Maximum milestone level to display">
  <value default="1" type="string">1</value>
  <uiType>TextBox</uiType>
  <minimum>1</minimum>
  <maximum>99</maximum>
  <visible>true</visible>
</setting>
```

# Default router name

<b>Preference</b>	Default router name
<b>Description</b>	Defines the default router to use when logging in to the workflow server.
<b>How to set</b>	In the <installation_directory> /Preferences/SitePreferences.xml file, edit Default Router Name value.
<b>Applies to</b>	Process
<b>Possible values</b>	Any valid server name Default value: vwrouter
<b>API</b>	No
<b>Exportable</b>	No

You can specify the default router to use when logging in to the workflow server. When the Open Client is installed, the default router name is "vwrouter."

## To set the default router name

1. From a text or XML editor, open the SitePreferences.xml file, located in the Preferences subdirectory of your Open Client installation directory.
2. Locate the following XML section and replace the default router name, shown in boldface in the example below, with the new default router name:

```
<category name="Routers"
  label="Routers"
  description="eProcess routers" visible="true">
  <setting name="DefaultRouterName"
    label="Default Router Name"
    description="Router name to use as default">
    <value default="vwrouter"
      type="string">vwrouter</value>
    <uiType>TextBox</uiType>
    <visible>true</visible>
  </setting>
  <setting name="Ports"
    label="Port Numbers"
    description="List of router port numbers">
    <value default="1099" type="integer">1099</value>
    <options>
      <option label="1099">1099</option>
    </options>
    <uiType>DropDownList</uiType>
    <visible>true</visible>
  </setting>
</category>
```



# Port numbers

<b>Preference</b>	Port numbers
<b>Description</b>	The default port and the ports on which Process RMI routers run
<b>How to set</b>	In the <installation_directory> /Preferences/SitePreferences.xml file, edit the Port Numbers value.
<b>Applies to</b>	Process
<b>Possible values</b>	Any valid port number above 1024 Default value: 1099
<b>API</b>	No
<b>Exportable</b>	No

Typically, use 1099 for Process 5.0 and 32771 for Process 5.1.

## To set the default RMI port

1. From a text or XML editor, open the SitePreferences.xml file, which is located in the Preferences subdirectory of your Open Client installation directory.
2. Locate the following XML section and change the port number, shown in boldface in the example below, to the desired port number. Note that the number must be greater than 1024.

```
<category name="Routers"
  label="Routers"
  description="eProcess routers" visible="true">
  <setting name="DefaultRouterName"
    label="Default Router Name"
    description="Router name to use as default">
    <value default="vwrouter" type="string">vwrouter</value>
    <uiType>TextBox</uiType>
    <visible>true</visible>
  </setting>
  <setting name="Ports"
    label="Port Numbers"
    description="List of router port numbers">
    <value default="1099" type="integer">1099</value>
    <options>
      <option label="1099">1099</option>
    </options>
    <uiType>DropDownList</uiType>
    <visible>true</visible>
  </setting>
</category>
```

## To add RMI ports

1. From a text or XML editor, open the SitePreferences.xml file, located in the Preferences subdirectory of your Open Client installation directory.
2. Locate the following XML section. For each port you want to add:
  - Duplicate the boldface line and paste the copy between the boldface line and the </options> line.
  - In the copy, change both occurrences of the port number to the desired number. Note that the number must be

greater than 1024. In the example below, the red text adds port 3277.

```
<Category name="Routers"
  label="Routers"
  description="eProcess routers" visible="true">
  <setting name="DefaultRouterName"
    label="Default Router Name"
    description="Router name to use as default">
    <value default="vwrouter" type="string">vwrouter</value>
    <uiType>TextBox</uiType>
    <visible>true</visible>
  </setting>
  <setting name="Ports"
    label="Port Numbers"
    description="List of router port numbers">
    <value default="1099" type="integer">1099</value>
    <options>
      <option label="1099">1099</option>
      <option label="3277">3277</option>
    </options>
    <uiType>DropDownList</uiType>
    <visible>true</visible>
  </setting>
</category>
```

## Note

The list of RMI ports should only include ports on which you run routers for this web application. To remove a port, delete its line in the options list. Be sure the designated default port is in the list.

# General site preferences

General site preferences allow you to set the local search path.

# Maximum number of CVL elements to retrieve

<b>Preference</b>	Maximum number of CVL elements to retrieve
<b>Description</b>	Limits the number of elements retrieved for a CVL (controlled value list).
<b>How to set</b>	In the <installation_directory> /Preferences/SitePreferences.xml file, edit the MaxCVLElementsRetrieval value.
<b>Applies to</b>	Open Client
<b>Possible values</b>	1 to 7500. The default is 2500.
<b>API</b>	No
<b>Exportable</b>	No

A CVL is a menu of items from which a user can select property values for a CS document. A CVL can have any number of elements. Limiting the number may improve performance. However, be aware that users get no indication that a CVL has missing elements (no "More" button appears at the end of the list).

# Number of columns

<b>Preference</b>	Number of columns
<b>Description</b>	Determines the number of columns on the Folder View page.
<b>How to set</b>	In the <installation_directory> /Preferences/SitePreferences.xml file, edit the NumberOfColumns value.
<b>Applies to</b>	Open Client
<b>Possible values</b>	1 to 30. The default is 4.
<b>API</b>	No
<b>Exportable</b>	No

# Number of rows

<b>Preference</b>	Number of rows
<b>Description</b>	Determines the number of rows visible to users on the Folder View page.
<b>How to set</b>	In the <installation_directory> /Preferences/SitePreferences.xml file, edit the NumberOfRows value.
<b>Applies to</b>	Open Client
<b>Possible values</b>	1 to 30. The default is 7.
<b>API</b>	No
<b>Exportable</b>	No

# Deselect on page change

<b>Preference</b>	Deselect on page change
<b>Description</b>	When set to yes, Open Client discards information associated with a selected item when a user displays a different page of a list view.
<b>How to set</b>	In the <installation_directory> /Preferences/SitePreferences.xml file, edit the DeselectOnPageChange value.
<b>Applies to</b>	Open Client
<b>Possible values</b>	Yes or No. The default is No.
<b>API</b>	No
<b>Exportable</b>	No

By default, when a user selects a document from a list view that spans several pages, the software remembers the selection and the toolbar state (which buttons are enabled) for that document until the user makes a different selection. The user can, for example, select a document on the first page of a list view, look at other list view pages, then return to the first page without losing the selection or the toolbar state.

When this preference is set to No, the selection and the toolbar state are lost when a user goes to another page of a list view. This setting may improve performance.

# Execute stored search on open

<b>Preference</b>	Execute stored search on open
<b>Description</b>	When set to Yes, bypasses the page with Find and Find Count buttons.
<b>How to set</b>	In the <installation_directory> /Preferences/SitePreferences.xml file, edit the ExecuteStoredSearchOnOpen value.
<b>Applies to</b>	Open Client
<b>Possible values</b>	Yes or No. The default is No.
<b>API</b>	No
<b>Exportable</b>	No

By default, when a user opens a stored search, the user can click Find to execute the search or click Find Count to count the number of matches that the search would find.



# Auto save annotations

<b>Preference</b>	Auto save annotations
<b>Description</b>	Determines whether annotations are saved or discarded if a user closes the JavaView window before saving annotations. If set to yes, automatically saves annotations. If set to no, discards annotations.
<b>How to set</b>	In the <installation_directory> /Preferences/SitePreferences.xml file, edit the AutoSaveAnnotations value.
<b>Applies to</b>	JavaView users with a JRE Java environment only. JavaView users with a JVM Java environment are prompted to save or discard annotations when closing the JavaView window.
<b>Possible values</b>	Yes or No. The default is No.
<b>API</b>	No
<b>Exportable</b>	No

# Local search path

Preference	Local search path
Description	Defines the main directory for local searches.
How to set	In the <installation_directory> /Preferences/SitePreferences.xml file, edit the LocalSearchPath value.
Applies to	Open Client
Possible values	Any valid path. Default is C:\FileNet\IDM.
API	No
Exportable	No

## To change the default search path

1. Open the SitePreferences.xml file in a text or XML editor.
2. Locate the following XML section and replace the path, shown in boldface in the example below, with the new local search path:

```
<category name="Search"
  label="Search"
  description="Search" visible="true">
  <setting name="LocalSearchPath"
    label="Local Search Path"
    description="Main directory for local searches">
    <value default="C:\FileNet\IDM"
      type="string">C:\FileNet\IDM</value>
    <uiType>TextBox</uiType>
    <visible>true</visible>
  </setting>
</category>
```

# User interface site preferences

The user interface site preferences allow you to set the number of rows and columns visible in a folder view.

# Update queue after processing step

<b>Preference</b>	Update queue after processing step
<b>Description</b>	When set to Yes, updates the workflow queue after each processing step.
<b>How to set</b>	In the <installation_directory> /Preferences/SitePreferences.xml file, edit the UpdateQueueAfterProcessingStep value.
<b>Applies to</b>	Open Client
<b>Possible values</b>	Yes or No.
<b>API</b>	No
<b>Exportable</b>	No

You might improve performance by disabling automatic queue updates. After you disable automatic queue updates, only the actions listed in the table below will update the queue:

<b>Queue</b>	<b>Actions that update the queue</b>
Inbox	Complete, Reassign, or Return
Tracker	Delete
Work queue	Complete, Reassign, Move to Inbox

# User list cache refresh rate

<b>Preference</b>	User list cache refresh rate
<b>Description</b>	Sets the interval between refreshes of the Process user cache
<b>How to set</b>	In the <installation_directory> /Preferences/SitePreferences.xml file, edit the UserListCacheRefreshRate value.
<b>Applies to</b>	Open Client
<b>Possible values</b>	0-999, 10 is the default, 0 disables refreshing
<b>API</b>	No
<b>Exportable</b>	No

Set this preference to a nonzero value to refresh the cache of Process users without restarting the web server.

# Viewing preferences

The Viewer preferences allow you to choose which viewers are available to Open Client users and, if Process is installed, which viewer is available on Java step processor pages. When Open Client is installed, both the IDM Viewer and Java Viewer are enabled by default.

**Note:** Only one viewer can be available in the Java step processor, even if both viewers are enabled. If Process is installed, see [Is Java Viewer enabled](#) for further details on which viewer is available to Java step processor users.

# Is IDM Viewer enabled

<b>Preference</b>	Is IDM Viewer enabled
<b>Description</b>	Defines whether the IDM Viewer is available to users. The IDM Viewer must be manually downloaded to each client. If a user selects the IDM Viewer without installing it first, download instructions are displayed.
<b>How to set</b>	In the <installation_directory> /Preferences/SitePreferences.xml file, edit the Is IDM Viewer Enabled value.
<b>Applies to</b>	Open Client
<b>Possible values</b>	True or False. The default is True.
<b>API</b>	No
<b>Exportable</b>	No

# Cache duration

<b>Preference</b>	Cache duration
<b>Description</b>	How long to keep items in cache
<b>How to set</b>	In the <installation_directory> /Preferences/SitePreferences.xml file, edit the CacheDuration value.
<b>Applies to</b>	Open Client
<b>Possible values</b>	0 to 60 minutes. The default is 5.
<b>API</b>	No
<b>Exportable</b>	No



# Default web mode

<b>Preference</b>	Default web mode
<b>Description</b>	Specifies which page, Browse or Search, users see after logging on.
<b>How to set</b>	In the <installation_directory> /Preferences/SitePreferences.xml file, edit the DefaultWebMode value.
<b>Applies to</b>	Open Client
<b>Possible values</b>	Browse or Search. The default is Browse.
<b>API</b>	No
<b>Exportable</b>	No

# Administration

Administration topics provide information on:

- How to view support information
- How to delete temporary files

See the FileNet Web Services Administrator's Help for more administration information.

# View support information

To view support information

1. From the Windows **Start** menu, select **Settings > Control Panel > Add/Remove Programs**.
2. In the **Currently Installed Programs** list, click on **FileNet Open Client**.
3. Click on **Support Information** to open the Support Info window.

# Delete temporary files

When a user adds a document to a library, the document is placed in a temporary folder on the web server:

```
%Temp%\FileNet\<<Session ID>
```

If the user logs off normally, this temporary folder is removed. However, the temporary files are not removed if the user closes the browser without logging off. You may wish to delete these temporary folders as part of your periodic server maintenance.

# General information

The general information topics include a glossary, information on FileNet, trademark and copyright notices, and the license agreement.

# Glossary

This glossary defines important terms used throughout Open Client.

[A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [GHI](#) [JKL](#) [MN](#) [O](#) [P](#) [QR](#) [S](#) [TUV](#) [W](#) [XYZ](#)

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## A

access rights

For a CS library, the security settings that control a user's access to libraries, documents, folders, stored searches, and search templates. Five levels define the access rights that can be assigned to users or groups: None, Viewer, Author, Owner, and Admin.

For an IS library, the security settings that control control a user's access to documents, folders, and annotations. Three access rights, read, write, and append/execute, each assigned to one and only one group for an item, constrain what users can do.

authentication

The process of verifying a user name and password at login time against a designated authority.

authorization

The process of establishing the access rights (also called permissions) for a user.

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## B

browse

To navigate through a folder structure.

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## C

cache

A temporary storage location on magnetic disk. An IS server has server cache, reserved space on the server for documents retrieved from optical disk. When you retrieve a document, the document moves from optical disk to server cache to local cache.

check in

An operation that returns a checked out document to a library, completing the creation of a new version. While checked out, a document is locked so that no other user can modify it. A checkin unlocks the document.

check out

An operation that copies a document to your local hard disk for editing. It also locks the document in the library. No other

user can modify a checked-out document.

commit, committal

A committed document is one that has been saved to an IS library. The last step in the process of creating an IS document, committal writes the document to a storage library and updates the property database.

Content Services (CS)

Server software and utilities for document management and version control.

CVL (controlled vocabulary list)

A list of acceptable values for a property field. The CS system administrator defines the list.

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## D

default group

Every CS user belongs to a default group. The system administrator assigns this group when defining your user account. At login time, if you don't specify a group, you log in as a member of this default group.

document type

For IS libraries only, the document type (F\_DOCTYPE) indicates the page type of a document. Possible values are IMAGE, FORM, TEXT, MIXED, or OTHER. The document format (F\_DOCFORMAT) indicates the file extension.

document

A set of image pages or other electronic files stored in a library and associated with a document ID and a set of properties. A CS document can include multiple versions.

document class

The system administrator defines document classes. A document class is a system property that specifies a type of document. Typically, a document class is a category like Invoices. When you add a document to a library, you must choose a document class. The document class determines:

- Which user properties apply to the document. User properties are values such as account numbers and names.
- For an IS document, the default access rights. These determine who can see, modify, add annotations to, and delete the document. (Access rights for a CS document are derived from the user profile of the user who adds the document.)
- For an IS document, disposition properties. For documents in the IS library, these determine when the document becomes eligible for disposal by archiving or deletion.

You can modify the document class of a CS document but not of an IS document

document ID (Item ID)

Each document in a library has a document ID that is unique within the library and cannot be modified.

- A CS document ID is a nine-digit number. When searching for document IDs, you can use wild cards, ? and \*, in the search condition.
- IS document IDs begin at 100000. You cannot use wild cards when searching for IS document IDs.

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## E

### Process Administrator

An Open Client application used by administrators to search and view workflows, edit workflow data and properties, and manage workflows.

### Process Configuration Console

An Open Client application used to configure the workflow database and environment.

### Process Designer

An Open Client application used to create and modify workflow definitions.

### Process Tracker

An Open Client application used to monitor, manage, and modify workflows to which you have been assigned as a tracker.

### external document

A document with properties but no content. Typically, an external document is used to track physical items such as artwork or video tapes.

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## F

### FileNet imaging formats

FileNet imaging formats are supported natively by the IDM Viewer. These formats include FileNet proprietary banded and tiled images, TIFF 6.0 (mono FAX Group III, FAX Group IV, Packbits, uncompressed; color—4-, 8-, and 24-bit—Packbits, uncompressed) images, multipage TIFF images, BMP (Windows and OS/2, RLE4, RLE8, and RGB/uncompressed) images, JPEG images, and DIB images. The document property F\_DocType is set to IMAGE for all of these image formats. In addition, FileNet imaging formats include FileNet forms (F\_DocType is FORM), COLD documents without background images and fax journals (F\_DocType is TEXT), and COLD documents with background images (F\_DocType is MIXED).

### folder

A folder is a container. A folder can contain subfolders and documents. A CS folder can also contain references to stored searches.

### folder name

At any level, an IS folder name can have up to 18 characters (no spaces are allowed), and a CS folder name can have up to 32 characters (any valid Windows folder name is allowed). For any library, a folder path and name cannot exceed 152 characters in all.

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# GHI

## group

A group of one or more users and other groups. The system administrator creates user and group accounts. A user can belong to any number of groups. Membership in groups determines a user's access rights.

On IS libraries, your access rights determine what you can do with folders, documents, and annotations.

On CS libraries, your access rights determine what you can do with folders, documents, versions, and properties. The system administrator assigns each user to both a group and a default group. A user logs on as a member of one group. This membership determines the access rights for the session. Once you are logged on you cannot change the group name in the current session. The only way to change the group is to log out and then log in with a different group name.

## host machine

The name of the computer that runs the CS library software. A host can be configured with multiple libraries.

## Image Services (IS)

Server software and utilities for imaging, document storage, and retrieval.

## index (or indexing)

For CS documents, indicates whether the version is currently indexed for content search.

## item ID (Document ID)

See document ID.

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# JKL

## launch

To begin the process specified in a workflow definition.

## library

A library is a document management system. Both FileNet Image Services systems and FileNet Content Services systems are called libraries.

A storage library is another type of library. It is always identified as a storage library. IS supports both optical storage libraries (OSARs) and magnetic storage libraries (MSARs).

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# MN

## name

An identifier for a library, system component (such as a printer), folder, or other object. For a CS document, the name is the document title. For a CS document, the name can be the document ID or a selected property.

## O

original document

An original document is a document stored in a CS source library. This document is copied to replicated folders in participating CS libraries using Replication Services.

original library

An original library is a CS library that contains the source folders and documents that are replicated to participating libraries in Replication Services.

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## P

participant

A user or group assigned to process work at one or more steps in a workflow.

password

IS library passwords can range in length from 6 to 16 characters, but only the first eight characters are checked. CS library passwords can range in length from 1 to 32 characters. Your network administrator can assign a password of eight characters maximum for logging on to an IS library, or of 32 characters maximum for logging on to a CS library. In addition, all passwords are case-sensitive. If you do not have a password, leave the password field blank.

property

A piece of information associated with an object. For example, Document Title is a document property. Your access rights determine whether you can view and modify properties.

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## QR

queue

A workflow database structure that holds work items. There are three queue types: user queues, work queues, and system queues.

replicated folder

A folder in a target library in Replication Services. Replicated documents are filed in this folder.

replication

Replication Services is an optional server feature that automatically copies documents and their properties from a CS source library to one or more CS target libraries.

routing

The part of a workflow definition that orders a series of steps.

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## S

search

For Open Client users, to execute a stored search or search template to locate documents. You can search for a document based on its properties, its content, or both.

For Process Administrator users, to search for workflows, work items, workflow events, and workflow statistics.

search template

A search that allows the Open Client user to enter or change values at run time. Search templates appear on the Search page.

security

The rules that allow and limit access to computers and data.

step

A stage in a workflow where a distinct, well-defined activity takes place. Each step on a workflow map represents a specific activity or task in the business process described by the map.

step processor

An application that provides information and resources to a participant for a workflow step.

stored search

A ready-to-execute search. Instead of entering or modifying search criteria as in a search template, you simply execute the stored search.

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## TUV

target libraries

Target libraries are participating libraries in Replication Services. These libraries contain replicated folders that store documents copied from the original library.

tracker

A workflow participant who is designated to monitor the progress of a workflow. If necessary, the tracker can modify workflow steps and properties.

user name

Your user name identifies you to the FileNet system. A CS user name can contain a maximum of 39 characters; an IS user name can contain a maximum of 19 characters. This name is assigned by your network administrator, the person who controls access rights to the FileNet library and, for CS libraries, access to specific documents. For IS libraries, the user name is case sensitive.

version

A specific draft of a document stored in the CS library. Each time a document is checked out and checked in, the library creates and stores a new version of the document.

version number

Uniquely identifies the version of the document.

virtual folder

An IS folder displayed by Open Client that does not actually exist in the library. WorkForce Desktop allows users to assign multilevel names to folders. Because of this, a user can assign a name like /aaaa/bbbb to a folder without first creating the /aaaa folder. This nonexistent folder /aaaa is a virtual folder. To build the folder tree, Open Client displays virtual folders as needed to provide access to subfolders.

A virtual folder has no properties, cannot contain documents, but always has at least one subfolder. You can create subfolders below a virtual folder.

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## W

wizard

An interactive utility that steps you through a complex task, such as adding a document to a library.

work item

The collection of data and references to the system information necessary for processing the data. The smallest component of work to be done in a workflow.

workflow

Work performed by two or more individuals or resources, serially or in parallel, to accomplish a business process.

workflow author

A person who creates workflow definitions (steps and routing) to complete business processes.

workflow definition

An electronic representation of the activities and resources required to complete a business process. A workflow definition tells the Process software how to route work to participants.

workflow map

A graphical representation of a workflow that shows the sequences of steps needed to complete a business process. A step represents an activity. Routes between the steps indicate one or more possible processing paths.

WorkFlo Services

Back-end workflow server software and utilities that provide workflow functionality.

work queue

A list of work items that can be completed by any one of a number of users, or work items that can be completed by an automated process.

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