



FileNet Integrated Document Management

Version 4.0.3

Quick Start Guide

<p>Contents</p>	<p>Product overview Setup overview Product affected Installation notes Configuration IS Setup CS Setup IBM FileNet products not included [All above link to the corresponding pages. Click then scroll down to see the heading.]</p>
<p>Product overview</p>	<p>Welcome to IBM FileNet Integrated Document Management 4.0.3!</p> <p>IDM Desktop (DT)</p> <p>IDM DT is a thick client based electronic document management system that provides access to IBM FileNet Content repositories, Image Services (IS) and Content Services (CS) libraries.</p> <p>IDM Web Services (WS)</p> <p>IDM WS is a web based electronic document management system that provides functionality similar to DT. It uses JavaScript and requires download of ActiveX components to provide richer UI experience.</p> <p>Open Client (OC) - Zero Download Browsing</p> <p>OC is a web based electronic document management system that provides functionality similar to WS. It does not require any IBM FileNet software to be installed on the client machine.</p>
<p>Setup overview</p>	<p>The product components below appear in installation order.</p> <p>Refer the hardware and software <i>requirements and support</i> from readme. Refer the <i>limitations and know issues</i> of products in the Release Notes.</p> <p>Read the <i>Setup instructions</i> below.</p> <p>Important information that isn't documented elsewhere and that could affect product installation and use is mentioned in "IBM FileNet products not included" section in this document.</p> <p>Use the following information for setting up the products you have just received as an integrated system.</p> <p>Image Services</p>

Required for image management to provide the server-based library services.

Setup Instructions

Image Services Documentation CD: downloadable\options.txt

Requirements and Limitations

If Image Services (IS) is set up to share a Microsoft SQL Server or Oracle database engine with Content Services (CS), install IS first. Before proceeding, ensure that IS and CS versions currently support the same version of the database engine.

Content Services

Required for content management to provide the server-based library services.

Setup Instructions

Content Services Admin Tools CD:

\documentation\csHPOracle.pdf
 \documentation\csSoIOracle.pdf
 \documentation\csWinOracle.pdf
 \documentation\csWinSql.pdf

Requirements and Limitations

- Do not install components on machines running IBM FileNet Web Services, Capture Desktop, or Capture Professional.
- May install onto an IS root/index server (where the database is resident). Before proceeding, ensure that IS and CS versions currently support the same version of the database engine.

IDM Desktop

Required for document management:
 (1) IS library and (2) CS library with Augment CS Admin Tools

Setup Instructions

The following files will be along with setup file in the DVD:

\ADMIND.chm
 \Readme_403.htm

Requirements and Limitations

On CS administrative clients:

- Must install before CS Admin Tools on the same Windows 2003 machine.
- If you install on a CS Server, you must install onto the same drive as CS.

On IDM Desktop user clients:

- May install on machines where IBM FileNet Web client is installed.
- May install to access both CS and IS library systems, both of which must be installed on their associated servers first.

Web Services

Required for web browser access to IS or CS.

Also required on any Web server where you will subsequently install Web WorkFlo or Open Client.

Setup Instructions

The following files will be along with setup file in the DVD:

ADMINW.chm
Readme_403.htm

Requirements and Limitations

Server component:

- Must install the Web Services server component on a Windows 2003 web server. Supports the Web client (downloadable ActiveX application).
- Do not install on a CS server.
- Must install prior to installing Web WorkFlo.
- Must install prior to installing Open Client. Required for Open Client (no-download HTML interface).

Web client:

- If you do not install IDM Desktop (which also installs the ActiveX-based Web client), you can download it to web browser machines.
- Do not download the Web client onto the server used by Web Services.

Open Client:

- Requires no download.

CS Web Admin Tools

Required for content management only if you want to provide a web browser administrative client to CS.

Setup Instructions

Content Services Admin Tools CD:
WebAdmin\Documentation\
setup.htm

Requirements and Limitations

- Must install Web Services or IDM Desktop first on the same Windows 2003 web server.
- Do not install on machines where Capture Desktop or Capture Professional is installed.

Capture Professional

Required for advanced scanning and file capture functionality on a Content Services or Image Services client.

Setup Instructions

Capture CD:
\Cap_Docs\
InstallationGuide.pdf

Requirements and Limitations

- Must install IS or CS before you install Capture Professional.
- Must install IDM Desktop and select libraries first on the same client machine.
- Do not install on machines running Capture Desktop.
- Do not install on machines where either CS Admin Tools or CS Web Admin Tools is installed.
- If you are upgrading from a previous release of Capture, refer to the appropriate chapter in the Capture Installation Guide.

Capture Desktop

Required for scan-and-capture functionality on a Content Services client.

Setup Instructions

Capture CD:
\Cap_Docs\
InstallationGuide.pdf

Requirements and Limitations

- Must install CS before you install Capture Desktop.
- Must install IDM Desktop and select libraries first on the same client machine.
- Do not install on machines running Capture Professional

- Do not install on CS servers.
- Do not install on machines where either CS Admin Tools or CS Web Admin Tools is installed.

WorkFlo Services

Required to provide eProcess functionality in an IBM FileNet domain. Supports these clients: Web WorkFlo, Open Client with eProcess Integration, and Visual WorkFlo.

Setup Instructions

WorkFlo Services for Windows Installation Handbook
or
WorkFlo Services for UNIX Installation Handbook

Both manuals are available on the IBM FileNet IBM Web site. After logging on to the site, navigate to the folder for the eProcess release you are installing.

Requirements and Limitations

All platforms:

- Detailed system requirements and restrictions are available in the eProcess Compatibility/Dependency/Hardware Matrix on the IBM FileNet IBM web site.
- In addition, note the following installation order guidelines for your workflow server platform.

Windows:

- Order of install varies by system configuration; see setup instructions for details.

UNIX:

Must install and configure Image Services and database first.

Web WorkFlo

Provides eProcess functionality for Web Services with Web client.

Setup Instructions

Web WorkFlo Installation Handbook

This manual is available on the IBM Web site. After logging on to the site, navigate to the folder for the eProcess release you are installing.

Requirements and Limitations

- Must install Web Services first.
- For detailed system requirements and restrictions, see the

	<p>eProcess Compatibility/Dependency/Hardware Matrix on the IBM FileNet IBM Web site.</p> <p>Visual WorkFlo Desktop, Professional Desktop & Toolkit</p> <p>Required for all client workstations that communicate directly (as opposed to through a web server) with a workflow server running WorkFlo Services.</p> <p>Setup Instructions</p> <p>Visual WorkFlo Services and Desktop Documentation CD: \vw_<release number>\READ_1ST.TXT</p> <p>Requirements and Limitations</p> <ul style="list-style-type: none"> • Must install WorkFlo Services first.
<p>Product affected</p>	<p>IBM FileNet combines a tightly integrated application development platform, easy-to-use web user interfaces and APIs, and world-class server technologies into various product suites to deliver a superior Enterprise Content Management (ECM) solution. With the combination of content, process and connectivity, IBM FileNet ECM solutions are designed to help companies manage the content and business processes that must come together to improve the way decisions are made – by individuals, across project teams and departments, or for your complete enterprise. Based on the IBM FileNet P8 architecture, these solutions provide a unified platform for managing content, processes and integration to existing systems for a wide range of business operations, creating real process efficiencies and providing a scalable architecture for expansion.</p> <p>eProcess</p> <p>The primary eProcess components from IBM FileNet are WorkFlo Services and Web WorkFlo.</p> <p>WorkFlo Services</p> <p>WorkFlo Services is the server software and utilities that enable eProcess activity within an IBM FileNet domain. All workflow servers run this software.</p> <p>Web WorkFlo</p> <p>Web WorkFlo is the web server software that provides eProcess functionality to Web Services with Web client. Web WorkFlo includes applications you can use to create, participate in, monitor, and manage workflows. In addition, a developer can use the Web WorkFlo development toolkit files to customize the interfaces used by workflow participants.</p> <p>NOTE For Web Services with Open Client, eProcess functionality is provided through the eProcess Integration option rather than through Web WorkFlo.</p>

Web Services

Web Services allows you to set up web servers so that users can access Content Services and Image Services libraries via browser-based user clients. User functionality is available in (1) Open Client, a no-download HTML interface and (2) Web client, a downloadable ActiveX-based application, both of which closely approximate the features in IDM Desktop.

IDM Desktop

IDM Desktop allows you to electronically view, manage, revise, share, and distribute virtually any document stored in enterprise libraries from within a Microsoft Windows Explorer. Seamless integration with Microsoft Windows environments, and with applications such as Microsoft Office and Outlook, enables management of more than 200 document formats.

Content Services (CS)

CS is an enterprise-class server-based family of content repository software services. It provides a digital content repository for managing dynamic documents throughout their life cycle. Likewise, it keeps all information safe, reliable, up-to-date, and easy-to-find, without regard to the originating application, file type, or storage location. CS provides the foundation for collaborative eContent management, enabling secure delivery, revision control, online publishing, and reuse. Web users can access CS enterprise information repositories via Web Services, while Windows-based users can access those same repositories from IDM Desktop.

CS also offers two administrative options for configuring and managing library systems: a robust Windows-based admin tools set, and a lighter browser-based administrative interface.

Image Services (IS)

IS is a high-volume digital image server for storing, retrieving, and managing transactional content and objects of all types. Numerous client interfaces are available to access IS libraries, based on fax, scan, and print functionality.

Capture Professional

As the front end to IS or CS, Capture Professional software captures, indexes, and stores virtually any document type. It is the first step in putting documents to work throughout an organization. Capture Professional is based on a component software design that allows you to tailor the application to the specific needs of your enterprise without extensive programming, and you can combine Capture Professional components with capture-specific, third party software components to enhance the capture process.

Capture Desktop

Capture Desktop provides a client interface that allows you to scan and import images and documents of any document type into CS library repositories.

	<p>Visual WorkFlo</p> <p>Visual WorkFlo is a suite of products that manage the flow of work throughout an organization. As an information management architecture, Visual WorkFlo itself does not perform work. Instead, it unifies and interacts with the various applications that perform work (such as document imaging, word processing, and spreadsheet programs). The Visual WorkFlo products are powerful tools you can use to define and support an automated business process that accomplishes a specific business goal, such as order entry or claims processing.</p>												
<p>Installation notes</p>	<p>System requirements</p> <p>Refer the IBM FileNet IDM 403 hardware and software requirements and support information at https://www-304.ibm.com/support/docview.wss?rs=3349&uid=swg27020881</p> <p>Release notes</p> <p>The release notes contain the limitations and known issues in IBM FileNet IDM 403 and available at IDM document Website http://www-01.ibm.com/support/docview.wss?rs=3346&uid=swg27009996</p> <p>Installing and upgrade IBM IDM 403</p> <p>The installation and upgrade instructions are available in Administrator guides for Desktop, Web Service and Open Client. Download from http://www-01.ibm.com/support/docview.wss?rs=3346&uid=swg27009996</p>												
<p>Configurations</p>	<p>Configuration IDM with Libraries</p> <p>Refer the Administrator Help to configure libraries at http://www-01.ibm.com/support/docview.wss?rs=3346&uid=swg27009996</p> <p>General Configuration</p> <p>All client machines and servers must run TCP/IP. Out-of-the-box user applications such as IDM Desktop are supported on servers only as required for administration and demonstration. IBM FileNet Web Services and Open Client are supported on workstations for demonstration and development purposes only. The chart below explains which libraries require installation of client libraries and configuration of an ODBC Data Source.</p> <table border="1" data-bbox="537 1556 1526 1776"> <thead> <tr> <th>Library/Database</th> <th>Install client libraries</th> <th>Configure ODBC Data Source</th> </tr> </thead> <tbody> <tr> <td>CS with SQL database</td> <td>No, installed by Setup</td> <td>Yes</td> </tr> <tr> <td>CS with Oracle database</td> <td>Yes, install from Oracle CD</td> <td>Yes</td> </tr> <tr> <td>IS with any database</td> <td>No, installed by Setup</td> <td>No, handled by IDM Configure</td> </tr> </tbody> </table> <p>Document classes are required on CS libraries. For details, see the IBM FileNet Content Services Release Notes.</p>	Library/Database	Install client libraries	Configure ODBC Data Source	CS with SQL database	No, installed by Setup	Yes	CS with Oracle database	Yes, install from Oracle CD	Yes	IS with any database	No, installed by Setup	No, handled by IDM Configure
Library/Database	Install client libraries	Configure ODBC Data Source											
CS with SQL database	No, installed by Setup	Yes											
CS with Oracle database	Yes, install from Oracle CD	Yes											
IS with any database	No, installed by Setup	No, handled by IDM Configure											

IBM FileNet Web Services

Browser recommendations

Open Client is browser agnostic. However, we focused testing on the browsers listed below and recommend that you choose one of these browsers for best results:

Internet Explorer 6.0, 7.0, 8.0 for Windows
Mozilla firefox 3.6 for Windows
Safari for Macintosh

Support for matching releases

The version of server and client should be same. IBM FileNet Web Services 4.0.3 supports only 4.0.3 clients.

Path-based URL retrievals

Path-based URLs are supported for web clients accessing CS 5.5. To enable path-based URLs, you must:

Enable the Path-based URL retrievals preference on the web server.

IDM Desktop Configuration

If your site uses DNS for IP address resolution, each IDM Desktop machine's configuration must allow resolution of the appropriate IS server name.

IDM Desktop supports FAT and NTFS file systems.

It is not necessary to install a browser to run IDM Desktop applications. However, if a supported browser is installed, IDM Desktop is also an IBM FileNet Web Services Client (equivalent to installing viewer.exe).

Integrated Applications

For application integration, the entire application must be installed on the user's local hard drive (not run from a CD or network drive, and not installed using the "Install on first use" option).

IBM FileNet Web Services and IDM Desktop are qualified with the supported versions of Microsoft Outlook. It is expected that using other MAPI-compliant email systems will work. However, if a problem arises with a MAPI-compliant email system, the problem must be replicated in a supported version of Outlook before IBM FileNet can commit to resolving the issue.

Web Clients

If SSL is enabled on the web server, an SSL client certificate must be installed on each web client workstation.

Viewing PDF Documents in the IDM Viewer

For best results, use Adobe Acrobat Reader to display PDF documents in the IDM Viewer. If the reader is installed, it runs as an IDM Viewer plug-in. You can download the free reader from the Adobe web site.

Compatibility and Co-Existence**LDAP**

IBM FileNet Web Services 4.0 and Open Client 4.0 support the following LDAP providers:

- Novell eDirectory 8.8 SP5
- Sun Java Directory Server 6.3.1
- Active Directory on Windows 2003 Server
- Active Directory on Windows 2008 Server

Application integration

IDM Desktop application integration is not compatible with IBM FileNet Web Services web client application integration. You cannot install both nor can you mix them in different applications. For example, you cannot have IDM Desktop application integration in Word and web client application integration in Excel.

IDM Desktop application integration is not compatible with P8 application integration. You cannot install both, nor can you mix them in different applications.

eProcess Engine and Open Client

Open Client and eProcess Engine must be kept in sync. When an eProcess Engine hot fix pack or new release is made available, refer to the IDM Desktop, Web Services, and Open Client 4.0.3 fix pack readme.

Customers can participate in workflows irrespective of which web site they were initiated from. The workflow in which users can participate is determined by the router/region they log into and the username with which they log on.

IBM FileNet Web Services

IBM FileNet Web Services includes its own web client and administrative tools. Do not install IDM Desktop, IS, CS, or any CS server component on the same machine with IBM FileNet Web Services. IBM FileNet Web Services is not supported on a CS remote Site Manager Server.

IDM Desktop

IDM Desktop 4.0.3 can be collocated with CS servers and CS Administration Tools on the same Windows server.

IS and CS Servers

Using a web client on the same server as IS or CS is not supported.

Capture and CS Capture Desktop

IBM FileNet Web Services is not compatible with any version of Capture.

IDM Desktop is required for Capture Desktop and Capture Professional. Refer to the IBM FileNet Capture-Print Products Dependency Matrix for version compatibility information.

Web Publisher

IBM FileNet Web Services cannot be collocated on the same system as IBM FileNet Web Publisher.

Print

IDM Desktop 4.0.3 can be collocated on the same PC with IBM FileNet Print 4.3 and 4.4.

IBM FileNet Web Services cannot be collocated on the same PC with any release of IBM FileNet Print.

Report Manager

IBM FileNet Web Services and IDM Desktop 4.0.3 can be used with Report Manager 4.1/5.0. You can collocate the thin and thick clients with a Report Manager desktop but not with the Report Manager server.

Before you can display Report Manager documents cross-cataloged to IS libraries, refer to the Report Manager documentation for configuration information.

<p>CS Setup</p>	<p>The diagram below shows the machines and general steps required to set up a Content Services (CS) system – in particular, one that includes Web Services, Open Client, IDM Desktop, eProcess, and Capture. While the exact steps depend on the configuration and options you are installing, the diagram shows the general order of installation.</p> <p>Step 1 Content Services (CS) Install CS onto one or more servers running a supported operating system and database (e.g., Microsoft Windows 2003 and SQL Server).</p> <p>Step 2 CS Admin Tools Install IDM Desktop onto the administrators' Windows 2003 clients (which can also be CS servers). Install CS Admin Tools onto the administrators' Windows 2003 clients.</p> <p>Step 3 Web Services, Web WorkFlo, & CS Web Admin Tools Install Web Services onto a Windows web server. Install CS Web Admin Tools onto the web server. After you install WorkFlo Services onto a server in Step 8, install Web WorkFlo onto the web server.</p> <p>Step 4 Web Client or Open Client Download Web client onto the supported browser clients. (If you use Open Client instead, no download is required.)</p> <p>Step 5 Capture Desktop Install a supported scanner onto a Windows 2003. Install IDM Desktop onto the scanner client. Install Capture Desktop onto the scanner client.</p>
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	<p>Step 6 WorkFlo Services Install WorkFlo Services onto a server running a supported operating system and database (e.g., Microsoft Windows 2000 and SQL Server). Install Web WorkFlo onto the web server where you have Web Services with Web client installed (see Step 3).</p>
	<p>IBM FileNet products not included</p> <p>The following products are not included in this setup overview and, in some cases, are not compatible with the products listed in the table. Contact your IBM FileNet representative for details.</p> <ul style="list-style-type: none"> IBM FileNet P8 Platform WorkFlo/Scan Web Content Manager WorkGroup IBM FileNet WCM 5.1 IBM FileNet Fax Application Templates (Acenza) IBM FileNet Print Panagon Web Publisher (PWP) OSAR-GTL Library Report Manager

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