Installing Documaker Enterprise

Windows 7 and MS SQL Server, Including WebCenter Content

A Green Field Installation Guide

Andy Little
Technical Director
Oracle Financial Services Global Business Unit

Rev 1.0, 19 Sep 2017

This guide assumes you are installing Oracle Documaker Enterprise Edition 12.6 on Windows 7 SP1 x64 using SQL Server as your target database and Oracle WebLogic 12.2.1.3. Some portions of the installation process may be applicable to other databases as well. The instructions in this guide will help you download and install the following:

- Oracle WebLogic 12.2.1.3
- Fusion Middleware 12.2.1.3.0
- Oracle WebCenter Content 12.2.1.3.0
- Microsoft SQL Server 2012 Express
- Oracle Documaker Enterprise Edition 12.6

Prerequisites

1. Database - SQL Server 2012 Express, using defaults with the following exceptions:
    1. Use Mixed Mode authentication; provide a strong password for *sa* user.
    2. Default instance `MSSQLSERVER` rather than named instance).
    3. Using the `Latin1_General_CS_AS_WS` collation (case-sensitive with Unicode support).
    4. Install the SQL Server Management Studio (SSMS) from here.
    5. Create a database using SSMS; name the database something appropriate; referred to hereafter as <DMK_DB>. Note: you must enable Read Committed Snapshot or else the RCU will fail. You can turn this on during the creation of the database setting appropriate option, or you can do this after the fact with SSMS (Database > Properties > Options > Miscellaneous > Is Read Committed Snapshot On = True).
    6. Ensure the database owner account is enabled and you know the password. This document assumes the sa user.
2. Java Development Kit 1.8.x
    1. Download and install latest JDK 1.8 from here. Must be 64-bit version of JDK.
    2. Set JAVA_HOME environment variable
        1. Start -> Computer -> Right Click -> Properties -> Advanced System Settings -> Environment Variables -> System Variables
        2. Locate JAVA_HOME. If not available, click New -> Variable Name and enter JAVA_HOME

3. Set Variable Value as the path to JDK installation folder, e.g. c:\proga~1\Java\JDK1.8.0_144

3. Windows Configuration
   1. Refer to product documentation on acquiring and installing the **Visual C++ 2008 Redistributable** package. If this is not installed, the product may fail to install.
   2. Refer to product documentation on acquiring and installing the **Visual C++ 2005 Redistributable** package. If this is not installed, the product may fail to start (this step is only needed for WebCenter Content).
   3. Disable 8.3 file naming by opening Windows Registry Editor (this step is only needed for WebCenter Content).
      1. Locate HKEY_LOCAL_MACHINE/SYSTEM/CurrentControlSet/Control/FileSystem
      2. Set NtfsDisable8dot3NameCreation = 1
      3. Reboot.
   4. Refer to product documentation on acquiring and installing the **Visual C++ 2005 Redistributable** package. If this is not installed, the product may fail to start.

Installation: WebLogic, FMW, WebCenter

1. Navigate to here. Accept the license agreement.
2. Download **either** *Quick Installer for Mac OSX, Windows and Linux (209 MB)* or *Generic Installer for Oracle WebLogic Server and Coherence (800 MB)*. This document assumes use of the Generic installer, but either will work.
   1. The Generic installer allows you to customize the installation, selecting an Oracle Home directory, JDK location, and more.
   2. The Quick Installer uses built-in defaults.
3. Download *Fusion Middleware Infrastructure Installer (1.5 GB).*
   1. Navigate to here. Accept the license agreement.
   2. Download the *Release 12c 12.2.1.3.0 Generic (1.6 GB).*
4. Unzip all zip archives into a directory, referenced as <INSTALL_DIR>
5. Open a command window as Administrator (Start -> Command Window -> Right-Click -> Run as Administrator
6. Execute the following in <INSTALL_DIR>

   C:\> %JAVA_HOME%\bin\java -jar fmw_12.2.1.3.0_wls.jar

1. [Welcome] Click Next.
2. [Auto Updates] Select Skip Auto Updates, click Next.
3. [Installation Location] Select desired Oracle Home directory, referred to hereafter as <ORACLE_HOME>. Click Next.
4. [Installation Type] Select WebLogic Server, click Next
5. [Prerequisite Checks] Click Next. Note: if you have problems, resolve them.
6. [Installation Summary] Click Install. Click Next.
7. [Installation Complete] Uncheck Automatically Launch Configuration Wizard. Click Finish.

7. Execute the following in <INSTALL_DIR>:

   C:\> %JAVA_HOME%\bin\java -jar fmw_12.2.1.3.0_infrastructure.jar

   1. [Welcome] Click Next.
   2. [Auto Updates] Select *Skip Auto Updates*, click Next.
   3. [Installation Location] Select <ORACLE_HOME> from the dropdown. Click Next.
   4. [Installation Type] Select *Fusion Middleware Infrastructure*, click Next
   5. [Prerequisite Checks] Click Next. Note: if you have problems, resolve them.
   6. [Installation Summary] Click Install. Click Next.
   7. [Installation Complete] Click Finish.

8. Execute the following in <INSTALL_DIR>:

   c:\> %JAVA_HOME%\bin\java -jar fmw_12.2.1.3.0_wccontent.jar

   1. [Welcome] Click Next.
   2. [Auto Updates] Select *Skip Auto Updates*, click Next.
   3. [Installation Location] Select <ORACLE_HOME> from the dropdown. Click Next.
   4. [Prerequisite Checks] Click Next. Note: if you have problems, resolve them.
   5. [Installation Summary] Click Install. Click Next.
   6. [Installation Complete] Click Finish.

9. Run the *Repository Creation Utility (RCU)* in:

   <ORACLE_HOME>/oracle_common/bin/rcu.bat

   1. [Welcome] Click Next.
   2. [Create Repository] Select *Create Repository* and *System Load and Product Load*. Click Next.

3. [Database Connection Details] Select *Microsoft SQL Server, Unicode Support = Yes,* and *Connection Parameters.* Enter the following as your connection parameters[1], then click Next. Click OK on the prerequisite check dialog.
   1. *Server Name* = localhost
   2. *Port* = 1433
   3. *Database Name* = <WCC_DB>
   4. *Username* = sa
   5. *Password* = <sa password>
4. [Select Components] Use the DEV schema prefix, Select *WebCenter Content* which will check other components as well. Click Next. Click OK to dismiss the prerequisite check dialog. Note: if you experience any errors, note the location of the error log and review for remediation.
5. [Schema Passwords] Enter passwords for schema(s) as desired. Note this password as you will be required to enter it in the next section. Click Next.
6. [Summary] Review summary and click Create. Watch the system load progress, click Close when completed.

Configuration: WebLogic/WebCenter

1. Run the *Configuration Wizard* in: <ORACLE_HOME>/oracle_common/common/bin/config.cmd
2. [Create Domain] Select *Create a new domain*. Optionally, select the domain location (hereafter referenced as <DOMAIN_HOME>). Click Next.
3. [Templates] Select the following templates (this will require some additional packages that will be automatically selected), then click Next
   1. Oracle Universal Content Management - Inbound Refinery
   2. Oracle Universal Content Management - Content Server
   3. Oracle Universal Content Management - Web UI
   4. Oracle WebCenter Enterprise Capture
4. [High Availability Options] Accept defaults and click Next.
5. [Application Location] Accept defaults and click Next.

[1] If you chose a named instance other than the default you may need to use Connection String instead.

6. [Administrator Account] Enter a password for the weblogic user and click Next.
7. [Domain Mode and JDK] Select development mode and specify the JDK (it should be set to the JDK you use to execute the installer JAR. Click Next.
8. [Datasources] Check the box for the given datasource(s) and then update the settings as shown below, then click Next.
    1. Vendor : MS SQL Server
    2. Driver : Oracle's MS SQL Server Driver (Type 4) Versions: Any[2]
    3. Hostname : localhost
    4. DBMS/Service : WCC
    5. Port : 1433
    6. Username : DEV_MDS
    7. Password : <password entered in Schema Passwords step>
9. [JDBC DS Test] All tests should complete ok, Click Next.
10. [Database Configuration Type] Select *RCU Data*, then use the same settings as shown Datasources (exception is that Username : DEV_STB. Click *Get RCU Configuration*. Click Next.
11. [Component Datasources] Click Next.
12. [JDBC Test] All tests should complete ok, Click Next.
13. [Credentials] Enter a username and password, then click Next. Note: MOS note suggests this username should be set to sysadmin.
14. [Advanced Configuration] Select *Administration Server*, *Topology*, and *Deployments and Services*[3]. Click Next.
15. [Administration Server] Choose a *single* Listen Address (specifically an IP address, not localhost and not All Local Addresses). Leave Server Groups as Unspecified. You may enable SSL and optionally change all Listen Ports (although for this guide I will leave as default 7001/7002). Click Next.
16. [Managed Servers] Choose a *single* Listen Address for each Managed Server. *If you don't choose the actual IP address, the installer may complain later.* Note: the names for the managed servers may be slightly different, but the names aren't important.

---

[2] Do NOT choose the Type 4:XA driver!

[3] You may add Node Manager, but for a development server this is probably not required. If so, follow the product installation documentation for specifics.

Do not enable SSL until you have a functional SSL certificate. Recommended settings are shown below; do not change the group names. Click Next[4].

1. WCC User Interface
    1. Server Name=wccui_server_1 (may show as wccadf_server1)
    2. Listen address=<IP_ADDRESS>
    3. Listen port=16225
    4. Enable SSL on SSL Listen port 16227
    5. Server Group is UCM-ADF-MGD-SVR
    6. Click add and repeat above, incrementing the server name by 1, Listen Port = 7003, and SSL Port 16227.
2. Capture Server
    1. Server Name=capture_server1 (may show as cpt_server1)
    2. Listen address=<IP_ADDRESS>
    3. Listen port=16400
    4. Server Group is CAPTURE-MGD-SVR
    5. Click add and repeat above, incrementing the server name by 1, Listen Port = 7004. No SSL.
3. WCC Server
    1. Server Name=wcc_server_1 (may show as UCM_server1)
    2. Listen address=<IP_ADDRESS>
    3. Listen port=16200
    4. Enable SSL on SSL Listen Port 16201.
    5. Server Group is UCM-MGD-SVR
4. IBR Server
    1. Server Name=ibr_server_1
    2. Listen address=<IP_ADDRESS>
    3. Listen port=16250
    4. Server Group is IBR-MGD-SVR

17. [Clusters] Name the default cluster wcc_cluster_1. Leave defaults.Click Add.
    1. Name the cluster cpt_cluster_1. Leave defaults. Click Add.

[4] The product installation documentation suggests creating additional managed servers for high availability but this step is not required for a development environment.

2. Name the cluster ibr_cluster_1. Leave defaults. Click Add.
3. Name the cluster wccui_cluster_1. Leave defaults. Click Next.

18. [Server Templates] Click Next. This is not needed for development environments.
19. [Dynamic Servers] Click Next.
20. [Assign Servers to Clusters] Select cpt_server_*n* in the Servers panel, select the cpt_cluster_1 in the Clusters panel. Click the Right arrow. Repeat for similarly-named servers and clusters. Click Next.
21. [Coherence Clusters] Click Next.
22. [Machines] Click Add and set the machine name to wcc_machine_1. Select a listen address that is *not localhost*. Click Next.
23. [Assign Servers to Machines] Move all servers to the machine wcc_machine_1. Click Next.
24. [Virtual Targets] Click Next. This is not needed for development environments.
25. [Partitions] Click Next. This is not needed for development environments.
26. [Deployments Targeting] Review the AppDeployment sections under each server, so you can see which applications are deployed to which managed server. Click Next. Example:
    1. UCM_server1 contains Oracle Universal Content Management - Content Server
    2. WCCADF_Server1 contains Oracle WebCenter Content - Web UI
27. [Services Targeting] Click Next.
28. [Configuration Summary] If you see any warnings, correct them then come back to this screen. Click Create.
    1. If you didn't pick IP addresses here or here, you may see a complaint from Coherence clustering. To resolve, click the Administrator Server link on the left and select an IP address, and/or click Managed Servers on the left and select an IP address.
29. [Configuration Progress] Click Next when available.
30. [End of Configuration] Note the AdminServer URL that should look like *http://ipaddress:port/console*. Note the IP address and port as <ADMINSERVER>. Click Finish.
31. Install NodeManager as a Windows Service by executing <DOMAIN_HOME>/bin/installNodeMgrSvc.cmd.

32. Optional: When starting the AdminServer, you will be prompted for the WebLogic admin credential. You can prevent this check by creating the <DOMAIN_HOME>/servers/AdminServer/security/boot.properties file with username=weblogic and password=<password>. After a successful startup, these values will be encrypted.
33. Start NodeManager.
    1. Start -> Run -> Services.msc
    2. Locate "Oracle WebLogic base_domain NodeManager" service. Right click and select Start.
34. Start the AdminServer
    1. Execute <DOMAIN_HOME>/bin/startWebLogic.cmd
    2. A shell window will appear; when the system is ready you should see <Notice> <WebLogicServer> <BEA-000365> <Server state changed to RUNNING.>
35. Start Managed Servers. This can be done with either Enterprise Manager or WLS Console.
    1. To use EM:
        1. Browse to <ADMINSERVER>/em (e.g. http://localhost:7001/em) and login with the credentials from Configuration Step 6.
        2. Select each desired server, and select Control > Start
    2. To use Console:
        1. Browse to <ADMINSERVER>/console and login with the credentials from Configuration Step 6.
        2. Select Environment > Servers from the Domain Structure.
        3. Select the Control tab in Summary of Servers
        4. Select the ibr_server_1 and wcc_server_1 servers using the checkbox.
        5. Click the Start button.
36. Configure Inbound Refinery (IBR)
    1. Open a browser to http://<server>:16250/ibr, where server is the host where IBR is installed. Login the credentials from Configuration Step 6.
    2. You can review the default settings here, the defaults should be sufficient.
    3. Click Submit. Restart the node as shown in step 35.
37. Configure Content Server (CS)
    1. Open a browser to http://<server>:16200/cs, where server is the host where CS is installed. Login the credentials from Configuration Step 6.

2. You can review the default settings here, the defaults should be sufficient.
3. Click Submit. Restart the node as shown in step 35.

Installation: Documaker

1. Acquire the installer for Oracle Documaker Enterprise Edition 12.6. This can be obtained either through Oracle Software Delivery Cloud (OSDC) or My Oracle Support (MOS).
   1. On OSDC, search for "Oracle Documaker Enterprise Edition". Note: at the time of this writing, 12.6 was not available on OSDC.
   2. On MOS, you can search Patches & Updates for Oracle Documaker 12.6 in the Oracle Insurance Applications group, or click here. The patch number for ODEE 12.6.0 is Patch 26100748.
2. Run the ODEE 12.6 setup.exe extracted from the installer.
3. [Welcome] Click Next.
4. [Installation Location] Select an appropriate home directory (referred to hereafter as <ODEE_HOME>). This guide will assume the default c:\oracle\odee_1 is used. Click Next
5. [Administrator] Set a user name and password for the Documaker Administrator web application user account. This is the user that is able to log in to Documaker Administrator and administer this application. This guide will assume the default user name documaker is used. Click Next.
6. [Database Server] Select SQL Server from the dropdown.
   1. Enter the hostname, IP address, or use localhost to identify the machine where the database is located. This guide assumes the database has been installed locally, therefore localhost is used.
   2. Enter the port where SQL Server listens for connections. The default 1433 is assumed.
   3. Enter the desired name of the database. The default IDMAKER is assumed. Note: SQL scripts will be generated that create the database and its files, so do not create the database before running the installation.
   4. Click Next

7. [Administration Schema] This identifies the database schema that will house the administration tables for Documaker.
    1. DB Index Folder - set to the location where SQL Server writes datafiles. In this guide we have used all defaults for installing SQL Server, so C:\Program Files\Microsoft SQL Server\MSSQL12.MSSQLSERVER\MSSQL\DATA will be used.
    2. DB Folder - set to the same as DB Index Folder.
    3. User - the default dmkr_admin should be used.
    4. Password - enter a password. Note that this must conform to the default SQL Server password filters, so it is advisable to make it secure as it will problematic if you have to correct this later. Do not use dictionary words, use alphanumerics with mixed case and have more than 8 characters. Try not to use special characters like (@) as the installer might complain.
    5. System ID - default to 1.
    6. System Name - default to System 1.
    7. Click Next.
8. [Assembly Line Schema] - This identifies the database schema that will house the Documaker assembly line tables.
    1. DB Index Folder - set to the location where SQL Server writes datafiles. In this guide we have used all defaults for installing SQL Server, so C:\Program Files\Microsoft SQL Server\MSSQL12.MSSQLSERVER\MSSQL\DATA will be used.
    2. DB Folder - set to the same as DB Index Folder.
    3. User - the default dmkr_asline should be used.
    4. Password - enter a password. Note that this must conform to the default SQL Server password filters, so it is advisable to make it secure as it will problematic if you have to correct this later. Do not use dictionary words, use alphanumerics with mixed case and have more than 8 characters. Try not to use special characters like (@) as the installer might complain.
    5. System ID - default to 1.
    6. System Name - default to Assembly Line 1.
    7. Click Next.
9. [Application Server] Select WebLogic Server from the dropdown.

1. Enter the credential for the WebLogic Server (default is weblogic).
2. Enter the password for the credential.
3. Click Next.

10. [JMS] Enter the settings for your JMS Server. This will be created during the WebLogic domain creation.
    1. Connection Class - leave as default.
    2. Initial Context Factory - leave as default.
    3. Provider URL - for this guide, since everything will be on one server, you can leave the hostname portion of the URL as the machine where the software is being installed. Do not use localhost as we have already configured the AdminServer to listen on the IP address of our server.
    4. Principal - here you can define a credential for the JMS Server connection. Use the same credential as the WebLogic server (e.g. weblogic) just for consistency.
    5. Credentials - the password for the principal; re-enter where shown.
    6. Click Next.
11. [Hot Folder] Use the default - this is the monitored folder where data files can be dropped. Click Next.
12. [SMTP Email Server] If you have an SMTP email server, you can configure the details here. If you don't have an SMTP email server, you can use a demonstration SMTP server for simple testing - download SMTP4DEV, extract, and set to run on startup. In the installer for ODEE, set the server to localhost and port to 25, then Click Next.
13. [UCM] If you have a WebCenter Content Server that will accept documents, change Enable to True and following these steps, otherwise click Next
    1. User - set to weblogic or any valid WCC user.
    2. Password - set to appropriate password for the WCC user defined above.
    3. Connection String - if the WCC server is on this machine (assumed yes) leave as default. If on another server, modify the hostname in the connection string. If you changed the RIDC (aka IntraDoc) port set this here. 4444 is the default. Note: if WCC is on a different server you will need to modify the WCC CS settings in that domain's config.cfg to allow connections from the server where ODEE is running.
        1. Locate the file <DOMAIN_HOME>\ucm\cs\config\config.cfg
        2. Locate the IntradocServerPort setting to note the port. Default is 4444.

3. Locate the SocketHostAddressSecurityFilter setting. Include a pipe-delimited list of allowed IP addresses. Wildcards * and ? are supported. Examples: 127.0.0.0|192.*.*.*|10.24?.*.*
4. Optionally[5], locate the SocketHostNameSecurityFilter setting. Include a pipe-delimited list of allowed hosts. Wildcards * and ? are supported. Examples: localhost|odee.acme.com | *.acme.com | odee12?.*.*
5. Save changes and restart WCC CS.

4. Document URL - this defines the URL for CS to access the folder where documents are stored. Use the default.

14. [UMS] If you have a UMS that will be used for sending notifications, change Enable to True and enter the settings, otherwise click Next.
15. [Installation Summary] Click Install.
16. [Installation Progress] When available, click Next.
17. [Installation Complete] Optionally, click Save to save the response file in case you want to re-run this installation in unattended mode. click Finish.

Configuration

1. Using SMSS, connect to your database server and perform the following:
   1. Open the C:\Oracle\odee_1\documaker\database\sqlserver2012\dmkr_admin.sql file and locate the section around line 139-141. Add the following:

      ```
      ALTER DATABASE IDMAKER
      COLLATE SQL_LATIN_GENERAL_CP1_CI_AS;
      GO
      ```

   2. Save the file and execute. This will create the IDMAKER database and the dmkr_admin schema and objects. Note: if you do not have ability to execute some of the commands in the SQL file, have your DBA do this step for you.
   3. Open the C:\Oracle\odee_1\documaker\database\sqlserver2012\dmkr_asline.sql file, and execute. This will create the dmkr_asline schema and objects. Note: if you do not have ability to execute some of the commands in the SQL file, have your DBA do this step for you.

[5] Oracle documents suggest that either SocketHostNameSecurityFilter or SocketHostAddressSecurityFilter be used, but not both.

4. Open the C:\Oracle\odee_1\documaker\database\sqlserver2012\dmkr_asline_user_examples.sql file and execute. This will create demonstration users.
5. Optionally, open and execute dmkr_asline_XX.sql and dmkr_admin_XX.sql files to add language-specific messages into Documaker. Consult the ODEE 12.6 installation guide on page 41 for additional details.

2. Open a browser to obtain the MS-SQL JDBC Type 4 driver from Microsoft. Click the Download button and select sqljdb_6.2.1.0_enu.exe, then click Next. After the file downloads, run the EXE to extract the files into a directory of your choice. Locate the enu\mssql-jdbc-6.2.1.jre8.jar file, and copy this file into the following directories:
   1. <ODEE_HOME>\documaker\bin\lib,
   2. <ODEE_HOME>\documaker\docfactory\lib
   3. <ODEE_HOME>\documaker\docupresentment\lib
   4. <WLS_HOME[6]>\wlserver\server\lib
3. Edit the <WLS_HOME>\oracle_common\common\bin\commExtEnv.cmd file and locate this line:
   1. set WEBLOGIC_CLASSPATH=%JAVA_HOME%\lib\tools.jar; %PROFILE_CLASSPATH%;%ANT_CONTRIB%\ant-contrib-1.0b3.jar; %CAM_NODEMANAGER_JAR_PATH%;
   2. Edit the line by adding the following to the end of it: %WL_HOME% \server\lib\mssql-jdbc-6.2.1.jre8.jar;
   3. Save the file.
4. Run <ODEE_HOME>\documaker\mstrres\dmres\deploysamplemrl.bat to deploy the assembly line form templates and resources to the newly-created IDMAKER database.
5. Open <ODEE_HOME>\documaker\j2ee\weblogic\sqlserver2012\scripts.
   1. Edit set_middeware_env.cmd in Notepad. Locate your WebLogic Middleware Home (if installing according to the instructions in this document it should be c:\oracle\middleware\oracle_home
      1. Update MW_DRIVE to the drive letter of this location.
      2. Update MW_HOME to the path of this location.
      3. Save and exit.

[6] Default location for this directory is c:\oracle\middleware\oracle_home

2. Edit weblogic_installation.properties in Notepad.
    1. Update dirWeblogicHome to the same value for MW_DRIVE\MW_HOME in the previous step above. Note the use of \\ instead of \.
    2. Update jdbcAdminPassword with the password established for the DMKR_ADMIN schema in this step. Replace '<SECURE VALUE>' including quotes, e.g. jdbcAdminPassword=myP@sswOrd123
    3. Update jdbcAslinePassword with the password established for the DMKR_ASLINE schema in this step.
    4. Update jmsCredential with the password established for the JMS server in this step.
    5. Update adminPasswd with the password established for the Documaker Administrator user in this step.
    6. Update weblogicPassword with the password established for the WebLogic Domain Administrator credential in this step.
    7. Update weblogicDomain to base_domain, since we are installing this into the existing WebCenter Content domain. If you are not following the instructions that were provided in this document for creating the WebLogic domain for WebCenter, you should leave this as the default so it creates a new domain.
    8. Save and exit[7].
3. Execute wls_create_domain.cmd in this directory.
    1. When prompted to execute the RCU, enter n (note: it is case-sensitive).
    2. The FMW Configuration Wizard will execute. Since you have already created a domain, you can cancel this wizard
    3. When prompted, press Enter to load ODEE into the WebLogic domain, which will invoke the WLST component. When the script finishes, press any key to exit the script.
4. Execute wls_add_correspondence.cmd if you intend to use Documaker Interactive. Press a key when prompted to exit after the deployment completes.
5. To progress further, you will need to start up the AdminServer if it not already running according to this step.

[7] After installation and configuration you should remove these values from setup files for security.

6. Because the configuration scripts assume the AdminServer that listens on localhost and our instructions above for configuring the WebCenter Content domain set a specific address, we'll need to modify the script. Edit documaker.py in this directory with Notepad. Search for t3://localhost and replace with t3://<IP address> of the WebLogic server - there should be two occurrences. Save the file.
7. Execute create_users_groups.cmd.
8. Execute create_users_groups_correspondence_example.cmd.
9. Because these scripts create new users and groups with unique identifiers, we need to run a one-time tool that links these users and groups to the entities created in the SQL schema. Open a browser to http://<IP address>:7001/jpsquery. You should see a list of Groups, Users, ApproverLevels Groups, and ApproverLevels Users that are each listed as "found". If there are any "failed" entries, just refresh the page to try again. Once all are listed as found, continue to the next step.
10. Use the WebLogic Console to associate the Documaker managed servers to the default machine.
    1. Open a browser to http://<IP-ADDRESS>:7001/console and login with the weblogic credential.
    2. Expand Environment > Machines in the Domain Structure. Click the wcc_machine_1 and then click the Servers tab.
    3. Select "Select an existing server" and choose dmkr_server from the dropdown and click Finish.
    4. Repeat for jms_server and idm_server.
    5. Click Activate Changes.
11. Use the WebLogic Console to start the jms_server. In Environment > Servers, click the Control tab and select the checkbox for jms_server and click Start, then Yes. This will instruct the NodeManager to start the jms_server. Wait for the jms_server to indicate that it is in the RUNNING state (you can click the Refresh button in the Control tab to automatically refresh the view.
12. Start the Documaker Document Factory ("docfactory") by opening the Services applet (Start > Services.msc). Locate the service named "ODDF (dmkr_asline:1:1)" and start it. Locate the service named "ODDP (dmkr_asline:1:1)" and start it.
13. Start the remaining managed servers (idm_server and dmkr_server).

14. Optional Step: Configure Documaker output into WebCenter. Open Documaker Administrator and select Assembly Line 1. Click Batchings. Select the LOCALPRINT batching, and click the Distribution tab. Check the Archive box, and select WebCenter Content from the dropdown.
15. Optional Step: Create a Documaker Cluster by opening WebLogic Console and navigating to `Environment > Clusters`.
    1. Click `New > Cluster`. Name the cluster `dmkr_cluster_1`. Click Ok.
    2. Click `dmkr_cluster_1`. Click Servers. Scroll down to the bottom of the page and click Add. Select `dmkr_server` from the dropdown and click Finish, then click Save. Click `Environment > Clusters`.
    3. Click `New > Cluster`. Name the cluster `idm_cluster_1`. Click Ok.
    4. Click `idm_cluster_1`. Click Servers. Scroll down to the bottom of the page and click Add. Select `idm_server` from the dropdown and click Finish, then click Save.
    5. Click `Activate Changes`.

Exploration

Now you can proceed to explore the system and its configuration. Before beginning, you may wish to review the Using WebCenter Content documentation. This will allow you to become familiarized with concepts of working with and managing content, including general concepts of content management, document libraries, enterprise libraries, folders, and document workflows. This information is in Part I of the Using Oracle WebCenter Content document, available here.

The Oracle WebCenter User Interface is a modern, intuitive interface that enables users to manage content in dynamic ways. Information on how to use this interface covers finding libraries, folders, and documents, viewing and annotating documents, check-in and check-out of documents, how to work with libraries and content folders, and use of workflows. This information is in Part II of the Using Oracle WebCenter Content document, available here.

For more information on Documaker, check out the Documaker Community, and the Oracle Documaker site. Refer to the Documaker installation guide for additional validation steps and exploration recommendations.

An important note: because this is a demonstration setup, the SSL certificates used to identify the servers are for demonstration only. Therefore, most browsers will complain about the certificate. You should be able to confirm exceptions (possibly permanently) to avoid this message. In a production environment, SSL services will be backed by actual certificates that will be trusted by your users' browsers so this message will not occur.

Use Cases

The list of use cases below are exemplary of system administration and configuration, as well as end-users functions. The list of use case shows recommended application(s) and function(s) that will satisfy those use cases.

1. To create highly-available service clusters, use the WebLogic Console.
2. To administer managed servers, use the WebLogic Console or WebLogic Enterprise Manager.
3. To administer clusters, use the WebLogic Enterprise Manager.
4. To administer Documaker DocFactory configuration, use Documaker Administrator.
5. To view Documaker DocFactory processing results, use Documaker Dashboard.
6. To create, review, and approve correspondence, use Documaker Correspondence.
7. To administer the Content Server, use the WebLogic Content Server. This can include:
    1. Creating workflows
    2. Defining retention requirements
    3. Defining and administering scheduled jobs
    4. Configuring records settings
    5. Reviewing log files
    6. Refinery administration (the refinery is responsible for file format conversions).
    7. Security Configuration
8. To define Libraries, Workflows, Folders, use WebCenter Content Server.

9. To participate in Workflows, use WebCenter Content Server or WebCenter User Interface.

Application URLs

Replace localhost with the hostname or IP address where you have installed the products using the steps above.

WebLogic Console	http://localhost:7001/console
WebLogic Enterprise Manager	http://localhost:7001/em
WebCenter Content Server	http://localhost:16200/cs
WebCenter Content User Interface	http://localhost:16225/wcc
WebCenter Inbound Refinery	http://localhost:16250/ibr
WebCenter Capture	http://localhost:7004/cpt
Documaker Administrator	http://localhost:10001/DocumakerAdministrator
Documaker Dashboard	http://localhost:10001/DocumakerDashboard
Documaker Interactive	http://localhost:9001/DocumakerCorrespondence
Documaker Web Services - Composition	http://localhost:10001/DWSAL1/CompositionService?WSDL
Documaker Web Services - Publishing	http://localhost:10001/DWSAL1/PublishingService?WSDL

Credentials

WebLogic and WebCenter administrative functions can be accessed with the weblogic credential. All Documaker functions can be accessed with the documaker credential, however this is typically used for administrative functions only. Documaker user functions (Dashboard, Interactive) and WebCenter user functions can be accessed with users defined in the WebLogic security realm. You can view these users in WebLogic Console under Domain Structure > base_domain > Security Realms > myrealm > Users. The password for all credentials is set on install and can be changed here.