Content Manager OnDemand

Client Installation Guide



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Note Before using this information and the product it supports, read the information in "Notices" on page 15.					

5697-N93), Version 8 Release 5 of IBM Content Manager OnDemand for Multiplatforms (product number 5724-J33), and Version 7 Release 1 of IBM Content Manager OnDemand for i Common Server (product number 5770-RD1) and to all subsequent releases and modifications until otherwise indicated in new editions.

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About this publication

This publication documents the IBM® DB2® Content Manager OnDemand (OnDemand) client. You can use the client to access OnDemand servers and search, retrieve, view, and print documents¹.

This publication explains how to get started with the OnDemand client, use the client to search for documents, and do other basic tasks with documents.

This publication describes OnDemand client programs that run on Windows[®] XP, Windows Vista, or Windows Server 2003. All of the client programs enable you to complete the following basic tasks:

- Log on to a client
- · Open folders
- · Search for documents
- · Retrieve documents
- · View documents
- · Print documents

On all Windows platforms, you complete the basic tasks the same way. For example, opening a folder with the Windows Vista client works the same way with the Windows XP client. However, the client programs might not look the same. The look of the client programs on your system may be slightly different from the client programs shown in this publication.

Important: The term *Windows client* refers to the OnDemand client program that runs on Windows XP, Windows Vista, or Windows Server 2003. The term *OnDemand server* refers to systems that are running OnDemand for the following platforms:

- · OnDemand for Multiplatforms
- OnDemand for z/OS[®]
- OnDemand for i5/OS[®]

Who should use this publication

If you use OnDemand to search for, retrieve, or view documents, you should use this publication. This publication introduces you to the basic features of the OnDemand client. For more information about the tasks that are described in this publication, refer to the online Help when using the client. The online Help also contains details about the other things you can do with the client.

How to use this publication

This *User's Guide* introduces you to the basic features of the OnDemand client. To use the client, your path control (PC) must communicate with an OnDemand server over a network. See your OnDemand administrator for information about the server that contains the documents that you need. Your OnDemand

^{1.} In this publication, the term *document* refers to a segment of an input file, such as a statement, policy, or other logical grouping of pages. A *report* is an input file that is stored in OnDemand. A 10,000-page telephone bill and a two-page Lotus[®] WordPro file are both reports to OnDemand. However, on some systems, documents and reports may be one and the same.

administrator can also verify that you have the correct operating environment and other information needed to use OnDemand.

About operating environments

This publication documents the Windows client.

To get the full benefits of OnDemand, you should have a working knowledge of the operating system on which you will run OnDemand. This publication assumes that you are familiar with the system environment, and uses terminology specific to these systems. For help with your system, refer to your system documentation and the system's online Help.

Before you begin working with OnDemand

Before you start the client and work with documents, IBM recommends that you take the following steps:

- Familiarize yourself with your operating system and using a mouse.
- Familiarize yourself with the OnDemand work space. When you start OnDemand, the main window appears. The main window is where you open folders, search for documents, and work with documents.
- See "Glossary" on page 19 for a list of terms that you will encounter when using OnDemand.
- Install the OnDemand client program. For more information about installing the client, see Chapter 2, "Installing the client on Windows," on page 5.
- Find the name of your OnDemand server and your OnDemand userid and password.
- Find the name of the folder that contains the documents you need.
- Determine the best way to start the OnDemand program...

How this publication is organized

This book contains the following sections:

- Chapter 1, "Overview," on page 1 describes OnDemand and the OnDemand documentation, and tells you where to look for help with using OnDemand.
- Chapter 2, "Installing the client on Windows," on page 5 describes how to install the OnDemand client on your workstation.
- Chapter 3, "Updating client software," on page 7 describes how to update the OnDemand client to a new release level.
- Chapter 4, "Removing the OnDemand client," on page 9 describes how to remove the OnDemand client from your workstation.
- Chapter 5, "Adding or removing OnDemand client components," on page 11 describes how to add or remove OnDemand client components from your workstation.
- "Glossary" on page 19 defines terms used in this manual.

ibm.com and related resources

Product support and documentation are available from ibm.com[®].

Support and assistance

Product support is available on the Web. Click Support from the product Web site at:

Content Manager OnDemand for Multiplatforms

www.ibm.com/software/data/ondemand/mp/support.html

Content Manager OnDemand for z/OS

www.ibm.com/software/data/ondemand/390/support.html

Content Manager OnDemand for IBM i

www.ibm.com/software/data/ondemand/400/support.html

Information Center

You can view the product documentation in an Eclipse-based information center that you can install when you install the product. By default, the information center runs in a Web server mode that other Web browsers can access. You can also run it locally on your workstation. See the information center at: www.ibm.com/software/data/ondemand/mp/support.html

PDF publications

You can view the PDF files online using the Adobe[®] Acrobat Reader for your operating system. If you do not have Acrobat Reader installed, you can download it from the Adobe Web site at www.adobe.com.

You can find PDF publications at: http://www.ibm.com/support/docview.wss?rs=129&uid=swg27017159

Accessibility information for OnDemand

For complete information about accessibility features that are supported by this product, see your *Administration Guide*.

How to send your comments

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Be sure to include the name of the product, the version number of the product, and the name of the book. If you are commenting on specific text, please include the location of the text (for example, a chapter and section title, a table number, a page number, or a help topic title).

Chapter 1. Overview

Content Manager OnDemand

OnDemand manages electronic archives of documents, searches for documents, and retrieves documents. You can use the OnDemand client programs to view documents, send, fax, and print documents, and attach electronic notes to documents.

OnDemand supports any process and organization that can benefit from hard copy or microfiche replacement and instant access to information. An OnDemand system can support small office environments as well as large enterprise installations with hundreds of system users. OnDemand can dramatically improve productivity and customer service in most businesses by providing fast access to the information that is stored in the system.

OnDemand processes the print output of application programs, extracts index fields from the data, stores the index information in a relational database (such as IBM DB2 Universal Database $^{\text{\tiny IM}}$ (DB2)), and stores one or more copies of the data in the system. With OnDemand, you can archive newly created and frequently accessed documents on disk storage volumes. You can also automatically migrate documents to other types of storage volumes as they age.

OnDemand provides the following features:

- Integrates the capabilities of Advanced Function Presentation (AFP), including management of resources, indexes, and annotations.
- Supports full fidelity reprinting and faxing of documents on devices that are attached to a workstation, OnDemand server, or other server on the network.
- Integrates data that is created by application programs into an online, electronic information archive and retrieval system
- Provides the controlled and reliable access to all of an organization's reports
- · Retrieves the data that you need when you need it
- Provides a standard, intuitive client with features such as thumbnails, bookmarks, notes, and shortcuts

If you are an administrator, you can use OnDemand to complete the following tasks:

- Manage OnDemand servers
- Authorize users to access OnDemand servers and data stored in the system
- Back up the database and data storage

OnDemand offers the following advantages over data archiving and retrieval systems you may have used:

- Retrieves the pages of the report that you need without processing the entire report
- Easily locates data without specifying the exact report
- Enables you to view selected data from within a report

OnDemand provides you with an information management tool that can increase your effectiveness when working with customers.

The OnDemand system

An OnDemand system has the following components:

- Client programs and server programs that communicate over a network
- A central database and the database manager program
- A storage manager that provides support for various types of storage devices to hold the reports that are stored in the system

The client program is your way to access documents that are stored in OnDemand. From the client program, you can perform the following tasks:

- Construct queries and search for documents
- · Retrieve items from OnDemand
- · View, print, and fax copies of documents
- · Attach electronic notes to documents

OnDemand servers manage control information and index data; store and retrieve reports, resources, and documents; and process query requests from OnDemand client programs. The OnDemand server manages a database of information about the users of the system and the reports that are stored in the system. The OnDemand server maintains documents that are on disk, optical, and tape storage devices. OnDemand servers may be installed on different physical systems.

When you search for documents, the OnDemand client sends a search request to the OnDemand server. The server returns the list of documents that meet the search request. When you select a document for viewing, the client retrieves a copy of the document from the server on which the document is stored, opens a viewing window, and opens the document.

OnDemand documents

OnDemand documents represent indexed groups of pages. Typically an OnDemand document is a logical section of a larger report, such as an individual customer statement within a report that contains thousands of statements. An OnDemand document can also be a part of a larger report. For reports that do not have logical groups of pages, such as transaction logs, OnDemand can divide the report into groups of pages. The groups of pages are individually indexed, and the client can retrieve the groups of pages more efficiently than it can retrieve the entire report.

OnDemand folders

OnDemand stores data in collections called "folders." A folder is a container for related information, such as statements, invoices, or correspondence; it is analogous to a folder in a filing cabinet. Folders are identified by name, for example Customer Statements.

Getting help

Getting task help

Online Help for all OnDemand tasks is organized by task. The procedures give you quick, step-by-step directions to help you complete your tasks. To get task Help, select "How Do I" from the Help menu.

Getting help for Windows

Online Help is available for all OnDemand windows. Window Help gives you detailed information about the purpose of the window and the fields, options, and commands that are contained in the window. To get window Help, click the Help button when the window is active.

Getting help for menu commands

Online Help is available for all of the commands on the OnDemand menus. Command Help gives you a brief description of the command. To get command Help, first select the command and then press the F1 key.

Using the help index

When you click the Index tab on OnDemand's online Help, a list of keywords appears. Enter a word or subject and, if the word is on the list, the index scrolls to that keyword. When you double-click the keyword, Help either opens a Help topic or lists a set of topics from which to choose.

Chapter 2. Installing the client on Windows

Obtaining OnDemand client software

To obtain the latest OnDemand client installation file from IBM service on the Web at ftp://service.software.ibm.com/software/ondemand/fixes. See Chapter 3, "Updating client software," on page 7 for instructions on downloading the client installation file from the Web.

Before you install the OnDemand client software you should make sure that your system meets the OnDemand software and hardware requirements. For the latest information on system requirements go to

http://www.ibm.com/support/docview.wss?rs=129&uid=swg27012104

Installing the client on Windows

When you install OnDemand using the CD-ROM, you can use the traditional installation method.

You can install all of the OnDemand features at once, or individual features as you need them.

Installing the client on a user's workstation

To install from the CD-ROM or to install from a network file server:

- 1. Insert the CD-ROM in the appropriate drive, or obtain the drive letter of the network drive that holds the OnDemand client software.
- 2. From the Windows taskbar, click Start, and then choose Run.
- 3. Type:

x:\client\windows\win32\setup

(where x is the letter of your CD-ROM drive or the network drive).

- 4. Click OK.
- 5. After the Setup program starts, click **Next** to continue. The Setup program transfers the OnDemand client files from the CD-ROM to your workstation.
- 6. On the Setup Type and Working Directory window, choose the type of installation:
 - Select **Typical** to install a copy of the OnDemand client on your hard drive. **Typical** is the default for installation.
 - Select **Custom** to choose the components to install on the workstation. You must select **Custom**:
 - To install the administrative client on a workstation
 - To install the OnDemand client in a language other than the default language that is set on the workstation
- 7. The Destination Folder shows the installation drive and directory. Click **Browse** to install the files to a different hard drive or directory.
- 8. Follow the instructions on the screen to complete the installation.

Citrix Server installation

Citrix Server installation

The OnDemand client software supports the concept of *multiple user* installs. The software can be installed once on a Citrix XenApp server and shared among end users from their remote workstations. Using this approach, there is no need to install and maintain the OnDemand client on each end user's workstation. For more information about configuring OnDemand for the Citrix environment see http://www-1.ibm.com/support/docview.wss?rs=129&context=SSEPCD&context=SSEPC6&context=SS3U2Y&q1=1306090&uid=swg21306090&loc=en_US&cs=utf-8?=en

For more information about distribution and multiple user installations, see the *IBM Content Manager OnDemand: Windows Client Customization Guide*.

Running automated installation

Automated installation allows administrators to standardize the OnDemand installation for all users in an organization. It also allows administrators to install OnDemand clients without the presence of users at their workstations. To read more about automated installation, see *IBM Content Manager OnDemand: Windows Client Customization Guide*.

Installing user-defined files

Administrators can store user-defined files in the OnDemand installation directory tree on a network file server. Any user-defined files stored there get copied to the workstation when a user runs the Setup program from the server. To read more about installing user-defined files, see *IBM Content Manager OnDemand: Windows Client Customization Guide*.

Mapping AFP fonts

For information about mapping AFP fonts, see the IBM Content Manager On Demand: Windows Client Customization Guide.

Chapter 3. Updating client software

Important: When you upgrade the client, the Setup program automatically replaces all out-of-date files with new ones. You are not permitted to add or remove components. To add or remove components, you must run the Setup program after you successfully upgrade the client.

Important: If the previously installed client was a compact install version older than v8.5.0.0, you should uninstall it before installing the new client.

Use the following information to obtain and install the latest version of the OnDemand client software from IBM on the World Wide Web.

To get the latest version of the client software:

1. Navigate to:

ı

http://www.ibm.com/eserver/support/fixes/

Follow the links to the latest PTF for your client.

- 2. Click the ZIP file for the client that you want to upgrade. For example: odwin32.zip
- 3. Select to save the file to disk.
- 4. Select a location and save the file.

After the download is complete, you can expand the ZIP file or store the ZIP file in a shared location, depending on how you plan to distribute the client software:

- You can expand the ZIP file to a temporary directory and then run the Setup program to upgrade the client on a workstation. After installing the client, you can delete the temporary directory and the ZIP file.
- An administrator can store the ZIP file in a shared location so that other users can access it.
- An administrator can expand the ZIP file to a shared location so that other users can run the Setup program from the shared location.
- If your organization shares a copy of the OnDemand client software from a network server, an administrator can expand the ZIP file and run the Setup program to upgrade the client on the server.
- If your organization distributes user-defined files with the OnDemand client, an
 administrator must expand the ZIP file to a shared location and then copy the
 user-defined files to that location. Users can then run the Setup program from
 the shared location to upgrade the client software and the user-defined files on
 their workstations.

Chapter 4. Removing the OnDemand client

The Uninstall feature lets you remove the OnDemand client from your workstation. Uninstall removes the directories for OnDemand and any references to OnDemand in system files. To run uninstall:

- For Windows XP SP2 or later:
 - 1. Select Start > Settings > Control Panel > Add/Remove Programs.
 - 2. From the list, select OnDemand32.
 - 3. Click Add/Remove.
 - 4. Click OK.
- For Windows Vista or later:
 - 1. Select Start > Settings > Control Panel > Programs and Features.
 - 2. From the list, select OnDemand32.
 - 3. Click Uninstall.
 - 4. Click OK.
 - 5.

Chapter 5. Adding or removing OnDemand client components

Once you have installed the OnDemand client you can add or remove components to suit your needs:

Important: If you are installing a newer version of the OnDemand client, you cannot add or remove components. However, once the installation completes you can re-run the installation to add or remove components.

- 1. Start the OnDemand client Setup program. The Welcome screen appears, with the Modify option selected.
- 2. Click Next.
- 3. To add a component, select it from the list; to remove a component, clear it from the list. You can also add and remove specific languages, fonts, and other options.

Important: When you add a component, make sure you leave the existing components selected. If you clear the check from a component, the Modify process removes it from the workstation.

- 4. Click Next.
- 5. Verify the components.
- 6. Click **Next** and follow the instructions on the screen to finish.

Chapter 6. Configuration changes for Content Manager OnDemand client applications in an FDCC environment

This section provides guidance on how to configure the Content Manager OnDemand client applications on Windows XP and Windows Vista in a Federal Desktop Core Configuration (FDCC) environment.

Federal Desktop Core Configuration (FDCC) on Windows XP and Windows Vista is a mandate issued by United States Federal government. The U.S. Executive Office of the President issued policy memorandum M-07-18 and policy memorandum M-07-11 requesting that all government agencies set up Windows XP and Windows Vista with the security settings that are defined in the FDCC. All agencies must comply with the new standard by February 1, 2008. The U.S. government pays high attention to the security and vulnerability of its IT infrastructure through the enforcement of the FDCC requirement.

Ensure that you have the administrator privileges on the FDCC system before you proceed with the instructions in this section.

Windows client, Windows administration client

- 1. Before you use the Windows client or the Windows administration client, add the library server to the FDCC system.
- 2. If the Windows client and the Windows administration client are installed in the Program Files directory (the default), then you need only read access to the Program Files directory.
- 3. Unless you specify otherwise, temporary user data are written to the following directory:
 - For Windows XP or later: C:\Documents and Settings\userid\Application Data\IBM\OnDemand32
 - For Windows Vista or later: C:\Users\userid\AppData\Roaming\IBM\
 OnDemand32

AFP Web Viewer, Image Web Viewer

- 1. In the Group Policy Editor of your system, make the following changes for Local Computer Policy → Computer Configuration → Administrative Templates → Windows Components → Internet Explorer:
 - For Security Zones: Do not allow users to change policies, change from Enabled to Disabled.
 - For Security Zones: Do not allow users to add/delete sites, change from Enabled to Disabled.

On Windows Vista only, make the following change for Local Computer Policy

- → Computer Configuration → Administrative Templates → Internet Explorer:
- For Security Zones: Use only machine settings, change from Enabled to Disabled. To ensure that users can add a site to the trusted sites, after this change, ask each user on the operating system to add all the sites of your Content Manager OnDemand servers into the trusted sites.

Make the following changes for Local Computer Policy → Computer Configuration → Administrative Templates → Windows Components → Internet Explorer → Internet Control Panel → Security Page → Trusted Sites Zone:

- For Run ActiveX controls and plugins, change from Disabled to Prompt.
- Restart your system for these changes to take effect.
- Add the Content Manager OnDemand server URL to the trusted sites of your Internet Explorer browser.

Make the following changes for **Local Computer Policy** → **Computer** Configuration → Administrative Templates → Windows Components → Internet Explorer:

- For Security Zones: Do not allow users to change policies, change from Disabled to Enabled.
- For Security Zones: Do not allow users to add/delete sites, change from Disabled to Enabled.
- 2. If you use Internet Explorer Version 7, then enable the Federal Information Processing Standard 140 (FIPS-140) on the WebSphere Application Server where your Content Manager OnDemand server is deployed into the server operating system.

Java Line Data Viewer Version 2 applet

- 1. Before you access the Java Line Data Viewer in a browser, install the Java Runtime Environment (JRE) plug-in.
- 2. If you are on Windows Vista, in the Group Policy Editor of your system, make the following change for Local Computer Policy → Computer Configuration → Administrative Templates → Windows Components → Internet Explorer:
 - For Security Zones: Use only machine settings, change from Enabled to **Disabled**. To ensure that users can add a site to the trusted sites, after this change, each user on the operating system must add all the sites of your Content Manager OnDemand servers into the trusted sites.

Make the following changes for **Local Computer Policy** → **Computer** Configuration → Administrative Templates → Windows Components → Internet Explorer → Internet Control Panel → Security Page → Trusted Sites Zone:

- For Java permissions, change from Disabled to High safety.
- For Run ActiveX controls and plugins, change from Disabled to Prompt.
- Restart your system for these changes to take effect.
- · Add the Content Manager OnDemand server URL to the trusted sites of your Internet Explorer browser.
- 3. If you use Internet Explorer Version 7, enable the Federal Information Processing Standard 140 (FIPS-140) on the WebSphere Application Server where your Content Manager OnDemand server is deployed into the server operating system.

After you complete these changes, a limited Windows desktop client user can access all the functionality of the ODWEK web viewers. One exception is the Java Line Data Viewer Version 2 applet. Currently, Internet Explorer settings does not allow the Java Runtime Environment to load the applet. Other available browsers do not have this restriction and allow the applet to operate correctly.

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Glossary

A

administrator. In OnDemand, a person authorized to maintain the system. For example, an OnDemand administrator can add, update, and delete users and folders.

Advanced Function Presentation (AFP). A set of licensed programs that use the all-points-addressable concept to print data on a wide variety of printers or display data on a variety of display devices.

AFP. Advanced Function Presentation

annotations. Comments, clarifications, and reminders that can be attached to a document.

application. In OnDemand, an object that describes the physical attributes of a report or input file, such as the type of data found in the input file, the code page, and whether the input data contains carriage control characters. An application also contains instructions that the data indexing and loading programs use to process the input data. Most customers define an application for each different output print data stream or source of data that they plan to store in Content Manager OnDemand.

C

cabinet. A cabinet is a container for folders. You can use cabinets to manage folders and enable users to navigate to folders more easily. A folder can belong to one or more cabinets.

client. (1) In a distributed file system environment, a system that is dependent on a server to provide it with programs or access to programs. (2) A workstation connected to a network running Content Manager OnDemand software that can log on and query the library server, retrieve documents from Content Manager OnDemand, and view and print documents.

copy group. In Tivoli® Storage Manager, a policy object that contains attributes that control the generation, destination, and expiration of backup and archive files. There are two kinds of copy groups: backup and archive. Copy groups belong to management classes.

D

default. A value, attribute, or option that is assumed when no alternative is specified by the user.

default value. A predetermined value, attribute, or option that is assumed when no other is explicitly specified.

document. (1) In Content Manager OnDemand, a logical section of a larger file, such as an individual invoice within a report of thousands of invoices. A document can also represent an indexed group of pages from a report. (2) A file containing an AFP data stream document. An AFP data stream document is bounded by Begin Document and End Document structured fields and can be created using a text formatter such as Document Composition Facility (DCF).

F

folder. A container for related information, such as statements, invoices, or correspondence, regardless of the source of the information or where the data is stored. When you open a folder, you have access to all of the information that it contains. For example, a billing folder might contain all of the reports for customer transactions over the past two years.

icon. A 32 by 32 pixel bitmap used by the windows manager to represent an application or other window.

L

LAN. local area network

line data. Data prepared for printing on a line printer, such as an IBM 3800 Model 1 Printing Subsystem. Line data is usually characterized by carriage-control characters and table reference characters.

line-data print file. A file that consists of line data, optionally supplemented by a limited set of structured fields.

local area network (LAN). (1) A computer network located on a user's premises within a limited geographical area. Communication within a local area network is not subject to external regulations; however, communication across the LAN boundary might be subject to some form of regulation. (2) A network in which a set of devices is connected to one another for communication and that can be connected to a larger network. See also Token-Ring Network.

M

menu bar. The area at the top of a window that contains choices that give a user access to actions available in that window.

N

named query. A set of entry field values on the Search Criteria and Document List window that a user has named and saved for selection as search criteria at a future time.

network. A collection of data processing products that are connected by communication lines for information exchange between locations.

notes. Electronic comments, clarifications, and reminders that can be attached to an Content Manager OnDemand document.

P

point. A unit of typesetting measure equal to 0.01384 inch (0.35054 mm), or about 1/72 of an inch. There are 12 points per pica.

R

report. A print data stream produced by a user-defined program or other software program that can contains hundreds or thousands of pages of related information. Most reports can be logically divided and indexed into single and multiple page objects called documents.

S

server. (1) On a network, the computer that contains the data or provides the facilities to be accessed by other computers on the network. (2) A program that handles protocol, queuing, routing, and other tasks necessary for data transfer between devices in a computer system. (3) A workstation connected to a TCP/IP network that runs the Content Manager OnDemand programs that store, retrieve, and maintain report files. Content Manager OnDemand supports two types of servers: a library server an object server.

server printer. A printer that is attached to a network server and is managed by a server print manager, such as IBM Infoprint Manager.

string. A series or set of alphabetic or numeric characters.

Т

toolbar. The region directly beneath the menu bar of the main window in Content Manager OnDemand client programs that support a graphical user interface.

toolbar button. A small bitmap on the toolbar that represents a command in Content Manager OnDemand client programs that support a graphical user interface. Click a toolbar button to quickly access a command.

type. To enter specific information using the keyboard, typing characters exactly as given.

U

user. A person authorized to log on to an Content Manager OnDemand server.



viewing window. The window in OnDemand where you browse documents.



Web administrative client. A Web-based administrative client that allows you to add, view, update, and delete users, groups, applications, application groups, folders, printers, and storage sets.

wildcard character. Search characters that represent other letters, numbers, or special characters. In Content Manager OnDemand, the % (percentage) and the _ (underscore) are wildcard characters.

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Program Number: 5697-N93

5724-J33 5761-RD1

SC27-0836-07

