

## **Oracle® Documaker Desktop**

# **Documaker Desktop Installation Guide**

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## Preface

Oracle Documaker Desktop is the market-leading policy issuance solution for managing general agents (MGAs), excess and surplus (E&S), and specialty insurance carriers in North America. It is an adaptive enterprise document automation solution that provides efficient, cost-effective policy creation, presentment, printing archival, retrieval, and web-enabling capabilities.

Oracle Documaker Desktop can help you dramatically improve the time required to write new business while handling more volume with existing staff. Oracle Documaker Desktop can be easily integrated with third-party and home-grown legacy systems, including accounting, agency management, and rating systems. And, with access to a library of pre-approved industry content, such as ISO and ACORD forms, it further accelerates new business.

Oracle Documaker Desktop's intuitive, easy-to-use design tools empower your business users to create documents throughout the insurance value chain, reducing their reliance on IT staff. It handles production of user-defined transactions, such as new policies, quotes, endorsements, cancellations, renewals, personalized correspondence, and other customer communications. It also supports creation of package policies, including multiple lines of business per policy with master declaration and sub declaration pages. Using it, you can efficiently manage policy issuance through work-in-progress (WIP); workflow, assignment, and routing; speed policy creation and accuracy with WYSIWYG form-based data entry; and much more.

## AUDIENCE

This document is designed for system supervisors and is intended to help you install and set up these Oracle Documaker Desktop components:

- Oracle Documaker Desktop
- PPS Reporting Tool

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## RELATED DOCUMENTS

For more information, refer to the following Oracle resources:

- Documaker Desktop User Guide
- Documaker Desktop Administration Guide
- Printers Reference
- Using the PPS Reporting Tool

## CONVENTIONS

The following text conventions are used in this document:

Convention	Description
<b>bold</b>	Indicates information you enter.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands, URLs, code in examples, and text that appears on the screen.

## Chapter 1

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### **Introduction**

This manual provides instructions for installing Oracle Documaker Desktop on computers running 32-bit versions of Windows, such as Windows XP and Windows Vista.

## SYSTEM REQUIREMENTS

The following Oracle Insurance applications run on a variety of operating systems and hardware platforms. Make sure you have these components before you install the following applications.

### Operating systems

The following applications run on a variety of operating systems, principally Windows 32-bit operating systems such as Windows 2003, Windows Vista, and Windows XP, UNIX/Linux 32-bit operating systems such as AIX, Solaris, and Linux x86, and z/OS (OS/390). This table shows the various product offerings and the operating systems under which they run.

	Windows+	z/OS	AIX	Linux	Solaris
<b>Documaker Studio</b>	Yes	No	No	No	No
<b>Documaker Workstation</b>	Yes	No	No	No	No
<b>Docupresentment</b>	Yes	No	Yes	Yes	Yes
<b>iPPS +++</b>	Yes	No	No	No	No
<b>EWPS ++</b>	Yes	No	Yes	Yes	Yes
<b>Documanager</b>	Yes	No	No	Yes	No
<b>Document Factory ++</b>	Yes	No	Yes	Yes	Yes
<b>Documaker Interactive ++</b>	Yes	No	Yes	Yes	Yes
<b>Documaker Server</b>					
<b>GenTrn</b>	Yes	Yes	Yes	Yes	Yes
<b>GenData</b>	Yes	Yes	Yes	Yes	Yes
<b>GenPrint</b>	Yes	Yes	Yes	Yes	Yes
<b>GenWIP</b>	Yes	Yes	Yes	Yes	Yes
<b>GenArc</b>	Yes	Yes	Yes	Yes	Yes

+ Includes Windows 2003, Windows XP, Windows Vista, Windows 2003 Server, and Windows 2008 Server. Be sure to have the latest service packs installed.

++ Runs under any operating system that supports the Java Virtual Machine.

+++ Runs under Microsoft Windows 2003 Server and Windows 2008 Server.

	Windows+	z/OS	AIX	Linux	Solaris
<b>Printers**</b>					
<b>AFP</b>	Yes	Yes	Yes	Yes	Yes
<b>GDI</b>	Yes	No	No	No	No
<b>HTML</b>	Yes	No	Yes	Yes	Yes
<b>Metacode</b>	Yes	Yes	Yes	Yes	Yes
<b>PCL</b>	Yes	No	Yes	Yes	Yes
<b>PCL 6*</b>	Yes	No	Yes	Yes	Yes
<b>PDF</b>	Yes	Yes	Yes	Yes	Yes
<b>PostScript</b>	Yes	Yes	Yes	Yes	Yes
<b>RTF</b>	Yes	No	Yes	Yes	Yes
<b>VIPP</b>	Yes	Yes	Yes	Yes	Yes
<b>XML**</b>	Yes	Yes	Yes	Yes	Yes

+ Includes Windows 2003, Windows XP, Windows Vista, Windows 2003 Server, and Windows 2008 Server.

\* You must have PCL 6 or higher for Unicode support on PCL-compatible printers. PCL 6 support became available in version 10.2.

\*\* XML on Z/OS is EBCDIC, plain text, limited character set support only. There is no ASCII, no ANSI, no UTF-8, and no UTF-16 support.

## Networks

The system does not use any specific network calls and is expected to work on any network compatible with Microsoft programs.

**Note** The network file server you use with Documaker Studio or Documaker Workstation must be a 100% Windows network compatible. Some UNIX systems that offer NFS support are not 100% Windows compatible and some UNIX systems do not honor Windows file locking calls and may not be suitable for use as a file server in a true multi-user environment.

## DOCUMAKER REQUIREMENTS

Your computer must have certain software and hardware components to run the programs that comprise the Documaker system. Depending on your software license, operating environment, and your processing needs, these requirements vary. The following tables outline the minimum hardware we use to test Documaker and are included for informational reasons only. You should run the system on a computer configured appropriately for the operating system you use and with the processing power to meet your needs

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**Note** For more specific information on the GenArc program and the additional archive and retrieval capabilities available, refer to the [Documaker Administration Guide](#).

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### On Windows

This table outlines the minimum hardware we use to test the system on a single user Windows XP workstation.

For Windows XP	Our minimum test configuration is
<b>CPU</b>	Intel® Core™ 2 CPU.2.13GHz
<b>Memory*</b>	1.99GB RAM
<b>Hard disk**</b>	148GB
<b>Printer</b>	HP-compatible printers supporting PCL5
<b>Printer memory***</b>	8mb RAM

\* Additional memory improves system performance.

\*\* Depends on the volume of data you must process

\*\*\* Additional memory may be required if printing complicated graphics or using a lot of fonts.

This table outlines the minimum hardware we use to test the system on a single user Windows Vista workstation.

For Windows Vista	Our minimum test configuration is
<b>CPU</b>	Intel® Core™ 2 CPU.1.86GHz
<b>Memory*</b>	1022MB RAM
<b>Hard disk**</b>	75GB
<b>Printer</b>	HP-compatible printers supporting PCL5
<b>Printer memory***</b>	8mb RAM

\* Additional memory improves system performance.

\*\* Depends on the volume of data you must process

\*\*\* Additional memory may be required if printing complicated graphics or using a lot of fonts.



## On z/OS (OS/390)

Documaker products run on the following versions/releases of IBM's operating systems:

- OS/390 version 1.1 to version 2.10
- z/OS version 1.6 and higher

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**Note** Following OS/390 version 2.10, new versions were named z/OS. Documaker runs on OS/390 and z/OS. In this manual, OS/390 and z/OS are referred to as z/OS unless otherwise noted.

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No product upgrades are required and no incompatibility problems have been reported when running Documaker on any of these operating system releases.

	Requirements
<b>Hard disk</b>	150mb
<b>Printer</b>	Any printer which supports IBM AFP, Xerox Metacode, or Adobe PostScript
<b>Runtime library</b>	IBM Language Environment for OS/390 version 2.10 or higher
<b>Compiler</b>	(Only necessary if adding custom code to the system) IBM C/C++ Compiler for OS/390 version 2.10 or higher

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**Note** Regardless of the type of computer you run the system on, to print charts on Xerox Metacode printers, you must have a GVG card. To print charts on IBM AFP printers, you must have a GOCA card.

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The amount of hard disk space you will need depends mainly on the volume of data you must process. Keep in mind too, that the C/C++ compiler is only required if you plan to write your own custom rules and recompile the source modules provided in the Software Developer's Kit (SDK).

## On UNIX Systems

For all UNIX systems, you can use any printer that supports IBM AFP, PCL, PostScript level 2, or Xerox Metacode. For HP printers, you need at least 8mb of memory, more if you are printing complicated graphics or using a lot of fonts. The amount of hard disk space you need depends on the volume of data you process. Keep in mind too, that a compiler is only required if you plan to recompile the system, such as if you customize the source code or use a runtime library other than the one shown for your operating system.

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**Note** For any UNIX installation, first make sure you have the uudecode, uncompress, and awk utilities installed.

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## On AIX systems

	Requirements
<b>Operating system</b>	AIX version 5.3 or higher
<b>Model*</b>	pSeries - Power RISC
<b>Compiler</b>	(Only necessary if adding custom code to the system) IBM Visual Age C/C+ version 6 IBM C/C++ Enterprise Edition for AIX v7
<b>Runtime library</b>	C Set ++ Runtime for AIX 5.0 or higher

	Tested on
<b>Model*</b>	pSeries p650
<b>CPU</b>	6 x 1.45GHz Power4+ processors
<b>Memory*</b>	12GB
<b>Hard disk**</b>	Two 36.4GB 10, 000RPM Ultra3 SCSI drives

\*Additional memory and a faster CPU is not required, but will improve performance.

\*\* Additional space required for your customized forms

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## On Linux systems

	Requirements
<b>Operating system</b>	GNU/Linux distributions RedHat Enterprise Linux (RHEL) version 5.1 or higher SuSE Linux Enterprise Server (SLES) version 9.3 or higher
<b>Model</b>	Intel/AMD based systems
<b>Compiler</b>	(Only necessary if you are adding custom code to the system) GNU C/C++ compiler: gcc-3.3.5-5 v3.3.5 or higher, gcc-c++-3.3.5-5 v3.3.5 or higher
<b>Runtime library</b>	libgcc-3.3.5-5 v3.3.5 or higher or compatibility module libstdc++-3.3.5-5 v3.3.5 or higher or compatibility module
<b>Additional requirements</b>	<ul style="list-style-type: none"> <li>The installer requires the sharutil package for the uudecode applet.</li> <li>RedHat Enterprise Linux version 5.1 or higher needs these compatibility modules for the C++ runtimes: <ul style="list-style-type: none"> <li>compat-libstdc++-33</li> <li>compat-libstdc++-296 (required for the current ORA native DBHandler for Oracle 10g in Documaker)</li> </ul> </li> <li>Any other utilized third-party software required packages, such as Oracle, DB2, MySQL, and so on.</li> </ul>
	Tested on
<b>CPU*</b>	Pentium 4, 1.80 GHz
<b>Operating system</b>	RedHat Enterprise Linux (RHEL) version 5.1 VMWare guest SuSE Linux Enterprise Server (SLES) version 9.4 VMWare guest
<b>Memory*</b>	768MB
<b>Hard disk**</b>	75GB
*Additional memory and a faster CPU is not required, but will improve performance.	
** Additional space required for your customized forms	

**On Solaris systems**

	<b>Requirements</b>
<b>Operating system</b>	Sun Solaris 9/SunOS 5.9 (SPARC based) or higher
<b>Model*</b>	UltraSPARC based
<b>Compiler</b>	(Only necessary if adding custom code to the system) Sun ONE Studio 8
<b>Runtime library</b>	Core Solaris 9

	<b>Tested on</b>
<b>Model*</b>	Sun Fire v240 Server
<b>Operating system</b>	Solaris v9 SPARC
<b>CPU</b>	2 x 1.28GHz UltraSPARC IIIi Cu
<b>Memory*</b>	2GB
<b>Hard disk**</b>	Four 36GB SCSI drives

\*Additional memory and a faster CPU is not required, but will improve performance.

\*\* Additional space required for your customized forms

---

## DOCUMENT FACTORY AND DOCUMAKER INTERACTIVE REQUIREMENTS

Here is the recommended hardware configuration needed to run Document Factory:

	Operating System/Software	Comments
<b>Presentation Tier</b>	Windows 2008 Server (64-bit) Standard Edition.	
	Application Server 1 (logical) WebLogic 11g (10.3.2) with 64-bit JVM to Host Messaging Middleware/Queuing System of: WebLogic JMS queues	The Admin server is used to configure the WebLogic domain, and monitor SOA resources. It also hosts the JMS queues.
	Application Server 2 (logical) SOA Suite with BPEL, Oracle Business Rules, OPSS, and UMS enabled	
	Application Server 3 (logical) Documaker Interactive:	
	Application Server 4 (logical) Documaker Administrator and Document Factory Dashboard	
	An HTTP web server for static content	This hosts the WIP Edit plug-in and can be used to host help content.
<b>Application Tier</b>	32 bit 1.6 JVM is required for Document Factory processing. Windows 2008 Server (32 bit) Standard Edition is recommended.	Windows 2008 Server (64 bit) Standard Edition is also supported. This layer runs Documaker, Document Factory, and Docupresentation. These 32-bit applications do not require a 64 bit machine. You must have an ODBC client and DSN for Document Factory Assembly Line and Administrator. Note: Documaker is a 32-bit application, and requires 32-bit drivers, even when running on a 64-bit machine.
<b>Data Tier</b>	Windows 2003 Server (64 bit) Standard Edition	Windows 2008 Server (64 bit) Standard Edition is also supported. This layer houses the database registry and processing tables.
	RDBMS (SQL): Oracle 11g R2 DB Client for Oracle 11g R2	32-bit ODBC drivers are required. Unicode must be enabled. (This is the default). Case sensitivity must be enabled. (This is the default). Database connections +
<b>Archive/Enclosure Content (Optional)</b>	FMW 11.1.1.3.0 ECM/UCM 11.1.1.3.0	Oracle Universal Content Management (UCM).

+ Use this formula to determine the number of database connections you need:

$$500 + (5 \times \text{number of users})$$

This formula is based on the minimum required connections to start and an understanding of how those application modules work. WebLogic JDBC connection pools should also be adjusted appropriately.

You will also need the following on the client side:

- Adobe Acrobat Reader
- Web browser
  - Microsoft Internet Explorer version 7.0 or higher
  - Mozilla Firefox version 2.0 or higher

If using Documaker Document Factory without Documaker Interactive: Correspondence, you will not need:

- Application Server 3 (logical)
- WIP Edit plug-in

### Recommended Setup

Here is the recommended setup for the various tiers:

---

#### Presentation Tier

<b>OS</b>	Windows Server 2008 x64
<b>CPU #</b>	Intel® 2 Cores 2.3GHz x64
<b>Memory #</b>	4GB RAM
<b>Hard disk</b>	150GB

---

#### Application Tier

<b>OS</b>	Windows Server 2008 x32 or x64
<b>CPU</b>	Intel® 4 Cores 2.3GHz
<b>Memory</b>	4GB RAM
<b>Hard disk</b>	150GB
<b>Printer</b>	HP-compatible printers supporting PCL5
<b>Printer memory ***</b>	8MB RAM

---

#### Data Tier

<b>OS</b>	Windows Server 2008 x32 or x64
<b>CPU</b>	Intel® 4 Cores 2.3GHz
<b>Memory *</b>	4GB RAM
<b>Hard disk ****</b>	500GB

# Additional CPU and memory resources required with more interactive users.

\* Additional memory improves system performance.

\*\* Depends on the volume of data you must process.

\*\*\* Additional memory may be required if printing complicated graphics or using a lot of fonts.

\*\*\*\* The database will carry historical information about all transactions processed, which could require a large amount of space.

---

---

**Minimum Testing Platform**

	Tested on
<b>OS</b>	Windows Server 2008 x64
<b>CPU</b>	Intel® 2 Cores 2.3GHz x64
<b>Memory *</b>	8GB RAM
<b>Hard disk **</b>	150GB
<b>Printer</b>	HP-compatible printers supporting PCL5
<b>Printer memory ***</b>	8mb RAM

\* Additional memory improves system performance.

\*\* Depends on the volume of data you must process

\*\*\* Additional memory may be required if printing complicated graphics or using a lot of fonts.

---

## DOCUPRESENTMENT REQUIREMENTS

Your computer must have certain software and hardware components to run Docupresentation. Depending on your software license and operating environment, these requirements vary.

### Docupresentation Workstation

For a Docupresentation workstation, you must have a personal computer equipped with the following:

- Microsoft Internet Explorer version 6.0 or later for Windows XP or higher
- Adobe ® Acrobat Reader version 7.0 or higher

### Docupresentation Server

You can run Docupresentation on the following operating systems:

- Windows
- AIX
- Linux
- Solaris

---

**Note** For Docupresentation Workstation and Server, you must have Java 1.5 or higher.

---

These tables provide more detailed information on our minimum platform requirements for testing Docupresentation implementations.

#### On Windows systems

	Tested on
<b>Operating system*</b>	Windows XP
<b>CPU</b>	Intel® Core™ 2 CPU.2.13GHz
<b>Memory</b>	2 GB
<b>Hard disk (RTE)</b>	80 GB
<b>Hard disk (MRL)**</b>	80 GB

\* Also tested on Windows 2000 Server and Windows 2003 Server.

\*\* Additional space required for your customized forms

---



## On AIX systems

	Requirements
<b>Operating system</b>	AIX version 5.3 or higher
<b>Model*</b>	pSeries - Power RISC
	(Only necessary if adding custom code to the system)
<b>Compiler</b>	IBM Visual Age C/C+ version 6 IBM C/C++ Enterprise Edition for AIX v7
<b>Runtime library</b>	C Set ++ Runtime for AIX 5.0 or higher

	Tested on
<b>Model*</b>	pSeries p650
<b>CPU</b>	6 x 1.45GHz Power4+ processors
<b>Memory*</b>	12GB
<b>Hard disk**</b>	Two 36.4GB 10,000RPM Ultra3 SCSI drives

\*Additional memory and a faster CPU is not required, but will improve performance.

\*\* Additional space required for your customized forms

## On Solaris systems

	Requirements
<b>Operating system</b>	Sun Solaris 9/SunOS 5.9 (SPARC based) or higher
<b>Model*</b>	UltraSPARC based
	(Only necessary if adding custom code to the system)
<b>Compiler</b>	Sun ONE Studio 8
<b>Runtime library</b>	Core Solaris 9

	Tested on
<b>Model*</b>	Sun Fire v240 Server
<b>Operating system</b>	Solaris v9 SPARC
<b>CPU</b>	2 x 1.28GHz UltraSPARC IIIi Cu
<b>Memory*</b>	2GB
<b>Hard disk**</b>	Four 36GB SCSI drives

\*Additional memory and a faster CPU is not required, but will improve performance.

\*\* Additional space required for your customized forms

## On Linux systems

	Requirements
<b>Operating system</b>	GNU/Linux distributions RedHat Enterprise Linux (RHEL) version 5.1 or higher SuSE Linux Enterprise Server (SLES) version 9.3 or higher
<b>Model</b>	Intel/AMD based systems
<b>Compiler</b>	(Only necessary if you are adding custom code to the system) GNU C/C++ compiler: gcc-3.3.5-5 v3.3.5 or higher, gcc-c++-3.3.5-5 v3.3.5 or higher
<b>Runtime library</b>	libgcc-3.3.5-5 v3.3.5 or higher or compatibility module libstdc++-3.3.5-5 v3.3.5 or higher or compatibility module
<b>Additional requirements</b>	<ul style="list-style-type: none"> <li>The installer requires the sharutil package for the uudecode applet.</li> <li>RedHat Enterprise Linux version 5.1 or higher needs these compatibility modules for the C++ runtimes: compat-libstdc++-33 compat-libstdc++-296 (required or the current ORA native DBHandler for Oracle 10g in Documaker)</li> <li>Any other utilized third-party software required packages, such as Oracle, DB2, MySQL, and so on.</li> </ul>
	Tested on
<b>Model*</b>	Dell PWS450
<b>Operating system</b>	RedHat Enterprise Linux (RHEL) v5.1 VMWare guest SuSE Linux Enterprise Server (SLES) v9.4 VMWare guest
<b>CPU</b>	2 x 2.40GHz Xeon processors
<b>Memory*</b>	3GB
<b>Hard disk**</b>	70GB SCSI drive
*Additional memory and a faster CPU is not required, but will improve performance.	
** Additional space required for your customized forms	

## Web Server

This table outlines the web server requirements for each operating system:

Operating system	Web server
Windows	2000 Server or 2003 Server (or higher), such as Microsoft Internet Information Server 4.0 (or higher).
AIX	Web server for AIX 5.3, such as IBM's HTTP Server for AIX version 1.3.3.1 or higher with the Java Runtime Environment and/or JDK for AIX, version 1.4.0 or higher.
Linux	Web server for Linux, such as Apache 1.3.12 or higher or IBM HTTP Server 1.3.9 or higher.
Solaris	Web server for Sun Solaris 7 or higher on SPARC, such as Java Web Server 2.0 or Apache 1.3.9 with the Java Runtime Environment and/or JDK for Solaris, version JRE 1.4.0 or higher. IBM HTTP Server 1.3.9 or higher can also be used.

**Note** We test DocuPresentment implementations on WebSphere Application Server (WAS) version 6.1.x and Tomcat 6.x Application Server.

## iPPS REQUIREMENTS

Your computer must have certain software and hardware components to run iPPS. This table outlines those requirements:

### Basic requirements

	Requirements
<b>CPU</b>	Pentium III or higher
<b>Operating systems</b>	Windows XP, Windows 2003 Server, or higher
<b>Memory*</b>	256MB RAM
<b>Hard disk**</b>	400 MB free
<b>Other components</b>	Keyboard and mouse or compatible pointing device
<b>Monitor</b>	Color SVGA monitor

\* Additional memory, while not required, will improve system performance.

\*\* The amount of hard disk space you will need depends mainly on the volume of data you must process.

### Client requirements

In addition to the basic requirements, each client should have the following:

- WIP Edit plug-in, version 11.3, patch 05 or higher
- Windows XP Professional or later
- Adobe Acrobat Reader 7.0 or higher
- Microsoft Internet Explorer 6.0 or higher with these Internet security options enabled:
  - Run ActiveX controls and plug-ins
  - Script ActiveX controls safe for scripting
  - Allow cookies that are stored on your computer
  - Allow per-session cookies (not stored)
  - Active Scripting

### Server requirements

In addition to the basic and client requirements, the computer you will use as a server should be configured with the following:

- Internet Information Services (IIS) with World Wide Web Server and File Transfer Protocol (FTP) Server
- A database such as Microsoft Access (Access 97 or higher), xBase, or SQL
- Visual Basic runtimes
- Microsoft XML Core Services 4.0 SP2 (msxml4) for iPPS 3.11 and below
- Microsoft XML Core Services 6.0 (msxml6) for iPPS 3.12 and higher
- ADO 2.6 or later

- A static IP address

**Web server**

For the web server, you should have:

- Minimum Pentium III with 512MB of RAM
- Windows 2003 Server
- Component Services or Microsoft Transaction Server
- Microsoft Visual Basic 6 Runtimes (included/installed with iPPS version 3.1 or higher)
- Microsoft Active Data Objects 2.6 or higher (included/installed with iPPS version 3.1 or higher)
- IBM WebSphere MQ (formerly MQSeries) or Microsoft Message Queue client
- ODBC-compliant database (Oracle, SQL Server, or DB2 recommended for production)
- Microsoft's XML parser:
  - MSXML 6.0 for iPPS version 3.12 and higher
- DocuPresentment version 2.2 or higher

## EWPS REQUIREMENTS

The EWPS Java web application deployment supports Java Runtime Environment (JRE) version 1.5 or higher. For best results, use JRE version 1.6. This table shows you the version of Java you need for each supported platform:

For this platform	You need this version of Java
Microsoft Windows (x86-32 and x86-64)	
XP (SP 2) Server 2003 (SP2)	Sun Java 5 or higher
Linux (x86-32 and x86-64) 32- and 64-bit kernels	
SuSE Linux Enterprise Server (SLES) version 9.4 or higher RedHat Enterprise Linux (RHEL) version 5.1 or higher	Sun Java 5 or higher or IBM Java 5 or higher
Sun Solaris (SPARC) 32-and 64-bit kernels	
Solaris 9/SunOS 5.9 or higher)	Sun Java 5 or higher
IBM AIX 5L pSeries (RISC) 32- and 64-bit kernels	
version 5.3 TL 5200-09	IBM Java 5 or higher
version 5.3 TL 5300-07	IBM Java 6 or higher

### Web application server

Whether running on Windows, Linux, Solaris, or AIX, you can use either of the following Java Web Application Servers:

- IBM WebSphere AS, version 6.1 or higher
- Tomcat version 5.5 or higher

---

**Note** We test with both WebSphere and Tomcat. Other Java application servers should also work.

---

An EWPS Java web application deployment requires the following version of Docupresentation to process web services requests:

- Docupresentation version 2.2, patch 04 or higher

## Message bus systems

EWPS communicates to Docupresentation using a message bus provider such as JMS, WebSphere MQ, or MSMQ. This table shows the possible message bus systems.

For this platform	You can use one of these message busses
Microsoft Windows (x86-32 and x86-64) <ul style="list-style-type: none"> <li>• XP (SP 2)</li> <li>• Server 2003 (SP2)</li> </ul>	HTTP/SOAP(*) (**) MSMQ (*) IBM WebSphere MQ, version 5.3 or higher (*) ActiveMQ JMS (*) (***) Other JMS providers
Linux (x86-32 and x86-64) **** <ul style="list-style-type: none"> <li>• SuSE Linux Enterprise Server (SLES) version 9.4 or higher</li> <li>• RedHat Enterprise Linux (RHEL) version 5.1 or higher</li> </ul>	HTTP/SOAP(*) (**) IBM WebSphere MQ, version 5.3 or higher (*) ActiveMQ JMS (*) (***) Other JMS providers
Sun Solaris (SPARC) <ul style="list-style-type: none"> <li>• Solaris 9/SunOS 5.9 or higher</li> </ul>	HTTP/SOAP(*) (**) IBM WebSphere MQ, version 5.3 or higher (*) ActiveMQ JMS (*) (***) Other JMS providers
IBM AIX 5L pSeries (RISC) 32-bit and 64-bit <ul style="list-style-type: none"> <li>• version 5.3 TL 5200-09</li> <li>• version 5.3 TL 5300-07</li> </ul>	HTTP/SOAP(*) (**) IBM WebSphere MQ, version 5.3 or higher (*) ActiveMQ JMS (*) (***) Other JMS providers

(\*\*) HTTP is recommended for development systems, not for production use.

(\*\*\*) At the time of publication, we noticed problems with the ActiveMQ JMS during heavy load testing, We expect Apache to address these issues in the future. Contact Apache for more information.

(\*\*\*\*) Other Linux distributions should work at kernel v2.6.11.4-21 or higher but have not been tested.

## Docupresentation, JRE, and Documaker versions

This table shows, for each supported and tested platform, the version of Docupresentation, the corresponding Java Runtime Environment (JRE) for Docupresentation, and the version of Documaker necessary to support EWPS.

For this platform	Docupresentation	JRE	Documaker
Microsoft Windows (x86-32 and x86-64) <ul style="list-style-type: none"> <li>• XP (SP 2)</li> <li>• Vista (SP 1)</li> <li>• Server 2003 (SP2)</li> </ul>	Version 2.2, patch 04* or higher	Sun JRE v1.5** Sun JRE v1.6	Version 11.3, patch 05 or higher
Linux (x86-32 and x86-64)**** <ul style="list-style-type: none"> <li>• SuSE Linux Enterprise Server (SLES) version 9.4 or higher</li> <li>• RedHat Enterprise Linux (RHEL) version 5.1 or higher</li> </ul>	Version 2.2, patch 04* or higher	Sun JRE v1.5** Sun JRE v1.6  IBM JRE v1.5** IBM JRE v1.6****	Version 11.3, patch 05 or higher
Sun Solaris (SPARC) <ul style="list-style-type: none"> <li>• Solaris 9/SunOS 5.9 or higher</li> </ul>	Version 2.2, patch 04* or higher	Sun JRE v1.5** Sun JRE v1.6	Version 11.3, patch 05 or higher
IBM AIX 5L pSeries (RISC) 32-bit and 64-bit <ul style="list-style-type: none"> <li>• version 5.3 TL 5200-09</li> <li>• version 5.3 TL 5300-07</li> </ul>	Version 2.2, patch 04* or higher	IBM JRE v1.5** IBM JRE v1.6****	Version 11.3, patch 05 or higher

\* A Docupresentation Windows installation includes a bundled Sun J2SE JRE version 1.6 which is used by default by the Docupresentation server.

\*\* Running the Docupresentation web services interface under JRE version 1.5 requires JAXB 2. See *Downloading JAXB* on page 21 for more information.

\*\*\* IBM's J2SE JRE version 1.6 is only supported in Docupresentation version 2.2, patch 05 or higher and Documaker Shared Objects version 11.3, patch 06 or higher.

\*\*\*\* Other Linux distributions should work at kernel version 2.6.11.4-21 or higher but have not been tested.

---

**Note** To find the latest version of Documaker, Docupresentation, Document Factory, iPPS, or EWPS, log onto the following web site:

<https://support.oracle.com>

---



## Downloading JAXB

JAXB provides a way to map XML and Java code and extend applications with XML and Web Services technologies. You must install and implement JAXB 2 to run the Docupresentation web services interface under JRE version 1.5.

Follow these steps to download the latest version of JAXB:

1. Go to the JAXB web site:  
<http://jcp.org/aboutJava/communityprocess/mrel/jsr222/index2.html>
2. Click Download Now for the latest version of JAXB.
3. On the new page, click the Download the Binary link and save the ZIP file to your local machine.
4. Unzip the downloaded ZIP file into directories. There will be a \jaxb-ri directory with a \lib subdirectory.
5. From the \lib subdirectory, copy the jaxb-api.jar and jaxb-impl.jar files to the \lib directory of your Docupresentation installation.

## DOCUMAKER WEB SERVICES REQUIREMENTS

Here is a list of the software requirements for Documaker Web Services (DWS).

Component	Description
<b>Java version 1.6</b>	Sun build 1.6.0_01-b06 JRockit 160_05_R27.6.2-20 IBM 1.6.0 SR5
<b>Application server</b>	Oracle WebLogic v10.3.2 IBM WebSphere v7.0 JBoss 6.0.0.M1 Tomcat 6.0.20
<b>Operating system</b>	Windows XP Windows 2003 AIX 5.3 Linux Suse 10 Solaris 10
<b>Database</b>	A database is required by Document Factory for the administration and assembly tables. The administration tables are used by composition services. The assembly tables are used by publishing services.
<b>Message bus</b>	A message bus is required by Docupresentation and also used by composition services.
<b>Docupresentation</b>	Oracle Docupresentation is required for composition services.
<b>Document Factory</b>	The Oracle Document Factory is required for publishing services.

**Note** You must download the JAX-WS RI when using Tomcat 6.0.20 or later because Tomcat is not a J2EE container and therefore does not provide a JAX-WS RI.

Extract the JAX-WS RI jar files and place them inside WEB-INF\lib directory of the Tomcat DWS.war file before deployment.

You can download the JAX-WS RI from this site:

<http://jax-ws.java.net/ri-download.html>

## Chapter 1

---

# Installing the System

This chapter provides instructions for installing Oracle Documaker Desktop on computers running Windows, such as Windows XP and Windows Vista.

---

**Note** For information on installing the PPS Reporting Tool, see *Installing the PPS Reporting Tool* on page 13.

---

This chapter contains information to help get you started downloading the software, installing the software, and downloading patches. For information on system requirements, see the [Oracle Documaker System Requirements Guide](#).

In this chapter you will find information on...

- *System Overview* on page 2
- *Downloading the Software* on page 3
- *Installing the System* on page 4
- *Downloading the Documentation* on page 11
- *Downloading Patches* on page 12

---

**Note** For information on how to set up, maintain, and customize Oracle Documaker Desktop, see the [Documaker Desktop Administration Guide](#). This guide is a reference tool for system supervisors.

---

## SYSTEM OVERVIEW

Documaker Desktop is the workstation-based form set entry and publishing piece of the Documaker system. Documaker is a total form set automation system which enables forms-intensive industries such as insurance, finance, utilities, and government to automate enterprise-wide forms and forms processing.

You collect the information you need for your form sets from various sources including manually entered data, system default data, archived data, and data extracted from external application systems. Documaker Desktop lets you enter that information and print complete, collated form sets on laser printers.

The system's unique data import and export feature enhances the data entry process. The system lets you import data files that automatically fill or propagate the data onto a form's fields. Exporting lets you extract data from Documaker Desktop for use in other applications or for import back into the system.

The system's user interface makes data entry and forms processing easy for non-technical users. You enter basic information and Documaker Desktop displays a list of applicable forms. You then select specific form sets in which to enter data.

## DOWNLOADING THE SOFTWARE

Once you make sure your computer has the correct hardware and software, you can download and install Oracle Documaker Desktop.

Oracle Documaker applications are available for download at the Oracle Software Delivery Cloud web site. The process includes:

- Logging in and agreeing to the terms and restrictions
- Searching for the applications you want to download
- Downloading those applications

Go to the Oracle Software Delivery Cloud web site to download Oracle Documaker applications:

<https://edelivery.oracle.com>

## INSTALLING THE SYSTEM

Once you finish downloading the software, follow these steps to install the Oracle Documaker Desktop on a personal computer running Windows.

---

**Note** Re-installation *does not* overwrite your INI files.

If you install the system into an existing directory, the current library setup is retained. If you install the system into a new directory, you must set up all of your libraries—just as you would for a new customer.

If you need to uninstall Oracle Documaker Desktop, use Control Panel's Add or Remove Programs option.

---

### Before you begin

Keep in mind...

- Be sure to log onto your computer as an *Administrator* and make sure you have full directory access permissions to the c:\windows\profiles\all users folder, as well as to the registry.
- When using NTFS drive formats, the logon name must be assigned all privileges and permissions to the Windows operating system folder and all sub-folders within, as well as to make changes to the Windows registry.

### Installation

Follow these steps to install the system:

1. From the directory into which you downloaded the media pack, unzip the file you downloaded, then double click on the following program:

```
CD1-7spDocumakerStudioFullSystemW32 (version and patch number).exe
```

The installation wizard starts.

2. Follow the instructions that appear on your screen to install the software. The installation creates folders and icons on your Start\Programs menu.

After you install the system, restart your computer so the various system settings can take affect. If you install the software on a network, you will need to set up icons and a program group for each user. Refer to your operating system's documentation for information on how to do this.

## Downloading Sample Resources

Oracle provides sample resources you can download and use to validate your installation . The system expects these resources to be available when you first start the system. Sample resources are available for download on both Oracle Software Delivery Cloud (<https://edelivery.oracle.com> ) and My Oracle Support (<https://support.oracle.com> )

Follow these steps to download the resources from My Oracle Support:

1. Go to the My Oracle Support site (requires registration)
2. Search for the sample resources
3. Download the sample resources

Follow these steps to download the resources from e-delivery:

1. Go to Oracle Software Delivery Cloud (requires registration)
2. Select a Product Pack - select Oracle Insurance Applications Platform - select Microsoft Windows
3. Click Go
4. In Results select Oracle Documaker Desktop Media Pack for Microsoft Windows
5. Click Continue
6. Download the Sample MRL

To download the SAMPCO sample resources for Documaker Desktop, follow these steps:

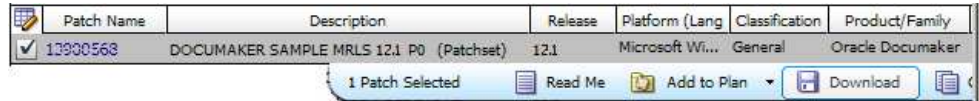
1. Go to the My Oracle Support web site, log in, and click the Patches & Updates tab.
2. Click the Product or Family (Advanced) button and search for Oracle Documaker version 12.1 patches (not Oracle Documaker Desktop).

The screenshot shows a search filter interface with the following elements:

- Include all products in a family
- \* Oracle Documaker (selected from a dropdown menu)
- \* Documaker 12.1 (selected from a dropdown menu)
- Microsoft Windows (32-bit) (selected from a dropdown menu)
- Exclude all superseded patches
- Search button

The site returns a list of available patches.

3. Click the Download button for the Documaker sample master resource libraries (MRLs).



Patch Name	Description	Release	Platform (Lang)	Classification	Product/Family
<input checked="" type="checkbox"/> 13900568	DOCUMAKER SAMPLE MRLS 12.1 P0 (Patchset)	12.1	Microsoft Wi...	General	Oracle Documaker

1 Patch Selected   Read Me   Add to Plan   Download

4. Save the file to a local directory, then follow the steps in the next topic to install the sample resources.

---

**Note** To use the sample resources, you must have installed the Java Runtime Environment (JRE) 1.6 or higher.

---



## Installing the sample resources

Follow these steps to install the sample resources:

1. Unzip the sample resources you downloaded. This will place the following files on your computer:

File	Description
readme.html	Provides information about the contents of your download.
amergen.zip	Contains sample resources for use with iPPS.
dms1.zip	Contains sample resources for use with Documaker Studio and Documaker Server.
sampco_(version and patch number).exe	Contains the sample resources for use with Documaker Desktop and Documaker Studio.

2. Double click on the SAMPCO\_(version and patch number).exe file to install the SAMPCO resources into your \mstres directory. Typically, this will be the c:\fap\mstres directory.

---

**Note** If you later want to remove the SAMPCO sample resources, simply delete the directory in which the resources are installed.

---

Continue with the tasks in the topic, *Setting Up System Icons*.

## Setting Up System Icons

A shortcut for Systems Icons is automatically created as a part of Studio installation. Refer to *Customizing the system icon* to modify the *Start In*.

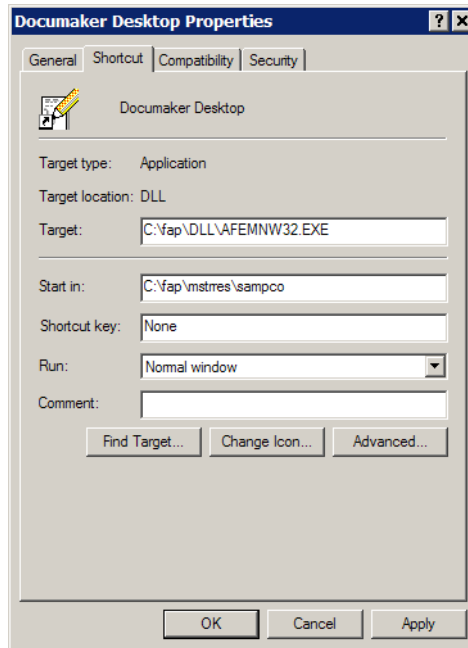
Follow the steps below in case the *create shortcut* option was left unchecked.

1. Right-click on your desktop.
2. Choose New, Shortcut. The Create Shortcut window appears.
3. Click Browse to locate the afemnw32.exe program. Typically, you will find this program in the c:\fap\dll directory. Then click Ok.
4. Click Next. The Select a Title for the Program window appears. Enter a name, such as *Documaker Desktop*, and click Finish.

## Customizing the system icon

Follow these steps to customize the system icon you created to open the SAMPCO resources you installed.

1. Right click on the system icon you created and select Properties. The Properties window appears:



2. Change the Start In directory to point to the location of the installed SAMPCO MRL. Typically this will be the c:\fap\mstres\sampco directory.

By starting the system in the \sampco directory, the system will use the FSIUSER.INI file in that directory. This INI file includes SAMPCO-specific settings and printer configurations for PCL, GDI, and PDF printers.

Now you are ready to start your system.

## Starting the System

To start the system, double-click the system icon you created and customized:



Documaker Desktop opens.

See the [Documaker Desktop Administration Guide](#) for more information on setting up additional users. This guide also contains information on INI options you can set to display a Logon window or to automatically log users on.

## RE-INSTALLING THE SYSTEM

If at any time in the future, you need to re-install the system, keep the following points in mind:

- If you re-install the software to the same drive and sub-directory, the PATH statement in your AUTOEXEC.BAT file will not be affected.
- If you re-install the software to a different drive or sub-directory, the new path statements will append to any previous settings in the AUTOEXEC.BAT file.  

This makes the system use path statements from the previous installation, and ignore the new path statements. If you want the system to use the new path statements, you must delete the old path statements in the AUTOEXEC.BAT file.
- System INI files (FSISYS.INI and FSIUSER.INI) are located in the FAP\DLL directory. The settings of the INI files located in the FAP\DLL directory will not be affected.
- The INI files in the FAP\DLL directory:
  - Specify default values and other defined parameters
  - Provide system flexibility
  - Store system default settings
  - Allow a user ID to be reset
- The INI files in the SAMPCO directories:
  - Allow users to specify Documaker Desktop functions
  - Determine how Documaker Desktop uses the library resources
- FSISYS.INI - Controls information related to the entire system, such as systems settings and program function calls.
- FSIUSER.INI - Controls settings which vary between resource libraries, such as sorting options, archival mode, and import and export ability.

## DOWNLOADING THE DOCUMENTATION

You can download the latest Oracle Documaker documentation at the Oracle Technology Network (OTN) web site. The process includes:

- Going to the applicable page on the OTN site
- Searching for the documentation you want to download
- Downloading that documentation

To download Oracle Documaker documentation, go to this page on OTN:

<http://www.oracle.com/technetwork/documentation/insurance-097481.html>

## DOWNLOADING PATCHES

You can download the latest Oracle software patches at the My Oracle Support web site. The process includes:

- Going to the My Oracle Support site (requires registration)
- Searching for the patches you want to download
- Downloading those patches

To download Oracle software patches, go to the My Oracle Support web site:

<https://support.oracle.com>

## Appendix A

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# Installing the PPS Reporting Tool

This appendix discusses how to install the PPS Reporting Tool. You can use this tool to select and retrieve information stored in your PPS archives.

This chapter includes information on these topics:

- *Requirements* on page 14
- *Installation* on page 15
  - *Installing the Required Dependencies* on page 15
  - *Starting the Installation* on page 16

## REQUIREMENTS

The following software and hardware components are a minimum of what you need to run the PPS Reporting Tool. Newer versions of these software packages and/or a more powerful system can improve performance. In addition, you will find information on setting up Windows user accounts.

### Software requirements

To use the PPS Reporting Tool, you should have these software systems:

- Any version of Documaker Desktop.
- A PDF file viewer to view FAP files as PDF files.
- Microsoft Windows XP (SP2) and Windows 7.
- Microsoft .NET Framework 3.5. For more information, go to this web site:  
<http://www.microsoft.com/downloads/en/details.aspx?FamilyId=333325fd-ae52-4e35-b531-508d977d32a6>
- Microsoft Core XML Services (MSXML6.0).
- Microsoft Internet Explorer 7.0 or higher (Not required to be your default internet browser).
- Microsoft Windows Installer 3.1. This is required for Microsoft Core XML Services (MSXML6.0).
- Microsoft Access (from Microsoft Office 2000 or higher).
- Microsoft Excel is recommended and is required for the Lloyds Bordereau Report Example (from Microsoft Office 2000 or higher).

### Hardware requirements

To run the PPS Reporting Tool, your computer must meet or exceed this hardware requirements:

<b>Processor</b>	800 MHz
<b>Memory</b>	256 MB
<b>Hard drive space</b>	330 MB (280 MB*, 50 MB PPS Reporting Tool)
<b>Display</b>	1024 x 768 High Color

### User account requirements

The Windows user accounts you set up must have these privileges:

- Computer Registry Read & Write access privileges
- Hard Disk Read & Write access privileges

Contact your System Administrator if you have questions about these privileges.



## INSTALLATION

Before you install the PPS Reporting Tool, make sure you...

- Log in as the Administrator or as a user with Administrative rights.
- Close all other programs before you start the installation process.
- Have Internet access. This may be required to install Microsoft .NET Framework.

After you finish, perform a Windows Update to make sure you have all of the latest security patches for the Microsoft products installed.

Download Oracle Documaker Desktop from the Oracle Software Delivery Cloud site and follow these steps to install the PPS Reporting Tool. For more information, see *Downloading the Software on page 3*.

### Installing the Required Dependencies

The Oracle Documaker Desktop installation automatically searches for and installs (with your permission) the required software packages, except Microsoft Access and Microsoft Excel (see *Software requirements* on page 14 for more information). If you cancel any of the required dependencies, the installation ends and is incomplete.

During this process Windows might prompt you to restart your computer. When your computer has restarted, please restart the install for the PPS Reporting Tool to continue.

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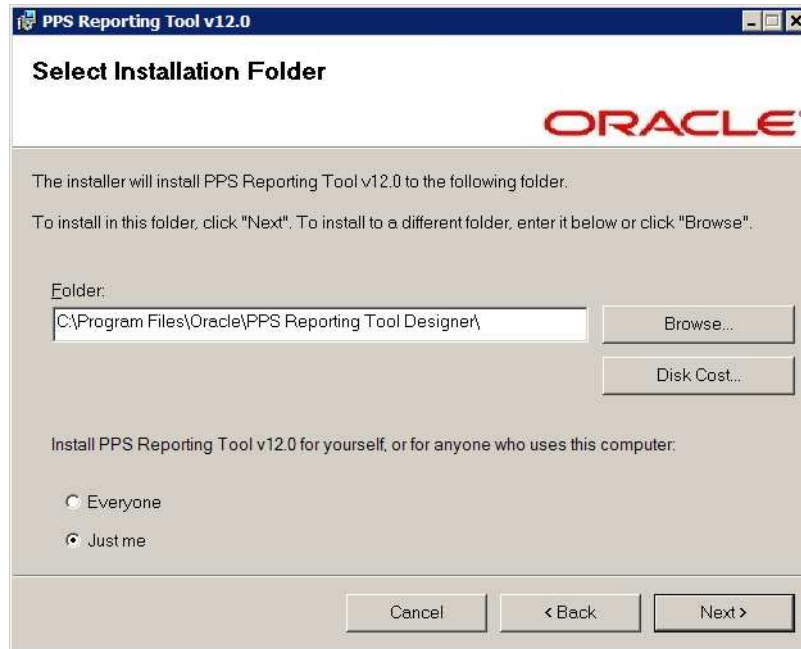
**Note** You should uninstall any prior versions of the PPS Reporting Tool *before* you install a new version.

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## Starting the Installation

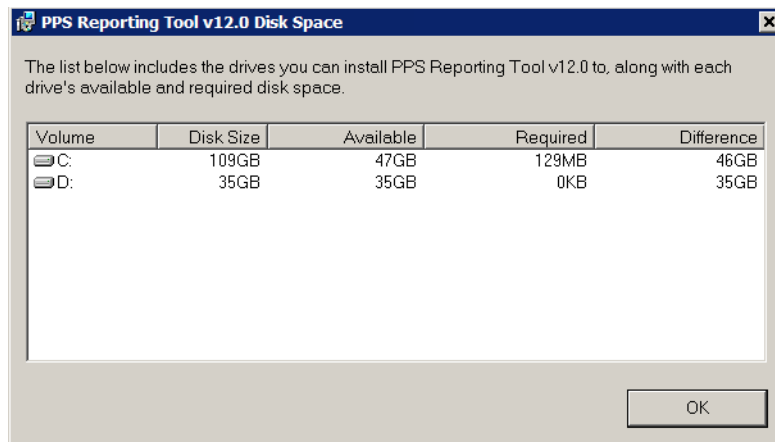
After the dependencies are checked, the installation for the PPS Reporting Tool starts. Follow these steps:

1. On the Welcome screen, click Next. The Select Installation Folder window appears:



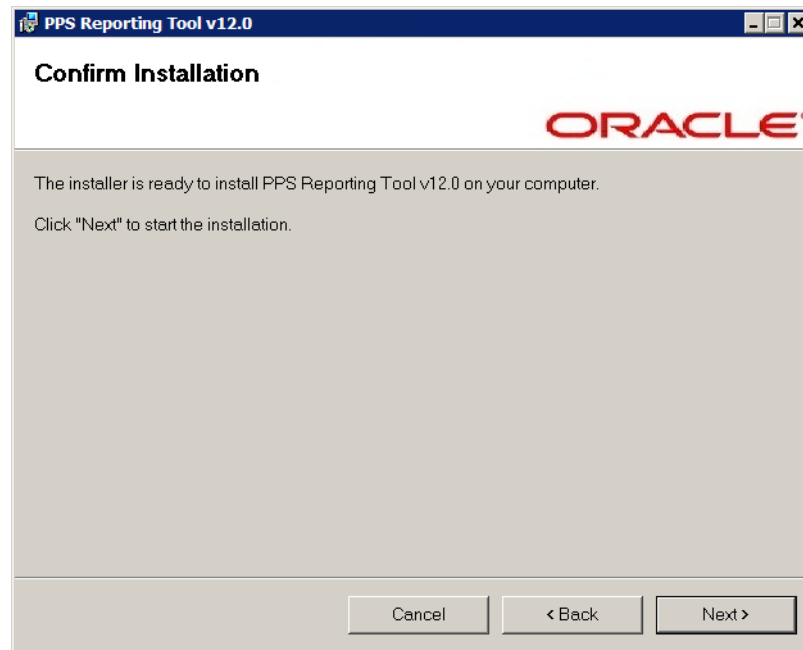
2. You can change the default installation drive, folder, and who can access the application from here or click Next to accept the defaults and continue.

If you need to choose a different drive, click the Disk Cost button to see which drives are available and how much space is required and available to you.

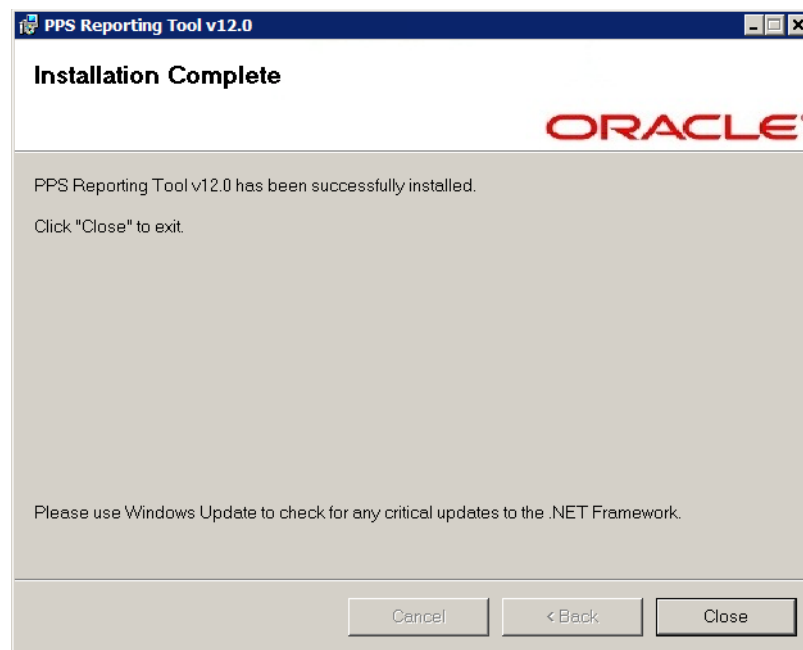


Click Ok to exit the Disk Space window and return to the installation.

3. Click Next. The Confirm Installation window appears.



4. Click Next again to confirm your selections and start the installation. When the installation is complete, you see the following window:



5. Click Close.



## A

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