

Content Manager OnDemand
Version 10 Release 1

Windows Client Installation Guide



Note

Before using this information and the product it supports, read the information in [“Notices” on page 17.](#)

This edition applies to the following products and to all subsequent releases and modifications until otherwise indicated in new editions:

- Version 10 Release 1 of IBM® Content Manager OnDemand for Multiplatforms (product number 5724-J33), IBM Content Manager OnDemand for z/OS (product number 5697-CM1) and Version 7 Release 3 of IBM Content Manager OnDemand for i (product number 5770-RD1)

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Accessibility information for Content Manager OnDemand

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

Chapter 1. Content Manager OnDemand Overview

Content Manager OnDemand manages electronic archives of documents, searches for documents, and retrieves documents.

You can use the Content Manager OnDemand client programs to view documents, send, fax, and print documents, and attach electronic notes to documents.

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

Content Manager 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®), and stores one or more copies of the data in the system. With Content Manager 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.

Content Manager 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, Content Manager 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 Content Manager OnDemand to complete the following tasks:

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

Content Manager 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

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

Content Manager OnDemand systems

The client program is your way to access documents that are stored in Content Manager OnDemand servers.

A Content Manager 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

From the client program, you can perform the following tasks:

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

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

When you search for documents, the Content Manager OnDemand client sends a search request to the Content Manager 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.

Content Manager OnDemand documents

Content Manager OnDemand documents represent indexed groups of pages.

Typically a Content Manager OnDemand document is a logical section of a larger report, such as an individual customer statement within a report that contains thousands of statements. A Content Manager 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, Content Manager 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.

Content Manager OnDemand 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.

Content Manager OnDemand stores data in collections called folders. Folders are identified by name, for example Customer Statements.

Getting help

Getting task help

Online Help for all Content Manager 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 Content Manager OnDemand windows

Online Help is available for all Content Manager 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 Content Manager 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 of the Content Manager OnDemand 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®

About this task

Obtaining Content Manager OnDemand client software

You can find the Content Manager OnDemand client software on the Web.

Before you begin

Before you install the Content Manager OnDemand client software you should make sure that your system meets the Content Manager OnDemand software and hardware requirements.

Procedure

To obtain the latest Content Manager OnDemand client:

- Visit <http://www.ibm.com/support/fixcentral/>
See the updating client software for instructions on downloading the client installation file from the Web.

Installing the client on Windows™

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

About this task

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

Installing the client on a user's workstation

You can install the client on separate workstations.

Procedure

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 Content Manager OnDemand client software.
2. From the Windows taskbar, click **Start**, and then choose **Run** and enter: `x:\client\windows\win32\setup` where x is the letter of your CD-ROM drive or the network drive that the downloaded file was unzipped to.
3. Click **OK**.
4. After the Setup program starts, click **Next** to continue.
The Setup program transfers the Content Manager OnDemand client files from the CD-ROM to your workstation.
5. On the Setup Type and Working Directory window, choose the type of installation:
 - a) Select **Typical** to install a copy of the Content Manager OnDemand client on your hard drive. **Typical** is the default for installation.
 - b) Select **Custom** to choose the components to install on the workstation. You must select **Custom** to install any combination of the administrator, client, or monitor features on a workstation.

- The Destination Folder shows the installation drive and directory.
6. Click **Browse** to install the files to a different hard drive or directory.
 7. Follow the instructions on the screen to complete the installation.

Citrix Server installation

The Content Manager OnDemand client software supports the concept of multiple user installs.

The software can be installed once on a Citrix XenApp server and shared among users from their remote workstations. Using this approach, there is no need to install and maintain the Content Manager OnDemand client on each user's workstation.

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

Running automated installation

Automated installation allows administrators to standardize the Content Manager OnDemand installation for all users in an organization.

About this task

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

Installing user-defined files

Administrators can store user-defined files in the Content Manager OnDemand installation directory tree on a network file server.

About this task

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 *Content Manager OnDemand: Windows Client Customization Guide*.

Mapping AFP fonts

For information about mapping AFP fonts, see the *Content Manager OnDemand: Windows Client Customization Guide*.

Mastering CDs from the Content Manager OnDemand client

You can extract data from a Content Manager OnDemand server, transfer the documents to a staging drive, and then use a CD-ROM authoring software to burn the staging drive to a CDR.

Before you begin

You need to activate the client data distribution for the CD-ROM mastering option to be available in the Content Manager OnDemand client.

About this task

When you use the CD-ROM mastering option, selected data is transferred from the server to the client, and then to a staging drive on the client PC. The data transfer is repeated for additional folders if necessary.

Procedure

Mastering CDs from the Content Manager OnDemand client:

1. Transfer documents from a Content Manager OnDemand server to a staging drive.

2. Burn the CD image to the CD-ROM.

Transferring documents from a Content Manager OnDemand server to a staging drive

You can transfer documents from the server to the staging drive.

Procedure

To use the CD-ROM mastering option:

1. Launch the Content Manager OnDemand client, and select **File > Set CD-ROM Mastering Options**. The Set CD-ROM Mastering Options window opens.
2. Under CD-ROM User, enter your user ID and password to the CD-ROM, which is a Content Manager OnDemand server.

The default user ID and password are both `cdrom`. **Optional:** select the staging drive. By default, the staging drive is `d:`

- If the **Exclude Notes** check box is checked, public exportable annotations are not copied even if they are present.
 - Only local hard drives are available as staging drives.
 - You cannot select more than one copy.
3. Click **OK**. The CD-ROM Mastering option becomes active on the File menu.
 4. After you run a search and get a list of documents, select **File > CD-ROM Mastering...**
The CD-ROM Mastering window opens. The CD-ROM Mastering option is only available when a search results list is displayed. If a document in the list is being viewed, the CD-ROM Mastering option is grayed out.
 5. In the CD-ROM Mastering window, select the folder that you want to add to CD-ROM.

Your current folder is automatically selected, and you can select alternate folders from the drop-down list. Provide a description in the CD-ROM folder description field. This description is required, and is saved in the drop-down list for user in other mastering sessions. You can update the CD-ROM mastering options by choosing the **Set Options** button:

- To transfer the documents to a staging drive, you must keep the search results list on the screen. Only one folder can be staged at a time.
 - All items in the search results list will be placed on the CD-ROM.
6. Click **OK** after you set the options.

The CD-ROM mastering process starts. You should be able to see the a window with five options in it:

Clean

Removes all files on the stage drive

Setup

Creates the necessary directory structures on the staging drive

Fetch

Retrieves the data and resources for the items in the hit list

Index

Re-indexes the retrieved data for the CD-ROM

Stage

Copies the CD-ROM installation files and the Content Manager OnDemand GUI (along with any installed languages) to the staging drive

7. After the CD-ROM mastering process finishes, you receive this message:

Do you wish to add another folder?

Click **No** to finish the process. Click **Yes** to return to the previous screen to select another folder.

Results

After the CD-ROM image is completed, Content Manager OnDemand writes an entry into the system log indicating the contents of the CD-ROM image. This log entry contains the user ID, password, and a complete listing of all the hits that are included in the image. The following is an example system log:

```
CD-ROM Volume A0D00000094

Produced on Saturday, August 22, 1998 at 14:50:41 MDT by CJLEWIS

COPIES      0

      USER   cdrom
PASSWORD    cdrom

FOLDER      Customer Information - Testing...

      Account          Customer Name
Document          Date
-----
-
      000-000-152    A & T PIANO          Customer Letters
11/15/94
      000-000-152    A & T PIANO          Credit Card Statement
10/20/94
      000-000-152    A & T PIANO          Customer Reports
11/30/94
      000-000-152    A & T PIANO          Company Letters
11/21/94
      000-000-152    A & T PIANO          Company Letters - PDF
11/15/94
```

Burning the CD image to the CD-ROM

Use a CD-ROM authoring software to burn the staging drive to a CDR.

About this task

Popular CD-ROM authoring software includes Roxio Ez-CD Creator, Nero, and Stomp.

Important: Any issue from burning the staging drive to CD is not supported by IBM.

Chapter 3. Updating client software

When you upgrade the client, the Setup program automatically replaces all out-of-date files with new ones.

Before you begin

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.

About this task

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 Content Manager OnDemand client software from Web.

Procedure

To get the latest version of the client software:

1. Navigate to <https://www.ibm.com/support/fixcentral/> and log in.
Choose the link for the latest PTF for your client.
2. Click the ZIP file for the client that you want to upgrade.
For example: `odwin32.zip` or `odwin64.zip`
3. Select to save the file to disk.
4. Select a location and save the file.

What to do next

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 Content Manager 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 Content Manager 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 Content Manager OnDemand client

The Uninstall feature lets you remove the Content Manager OnDemand client from your workstation.

About this task

Uninstall removes the directories for Content Manager OnDemand and any references to Content Manager OnDemand in system files.

Procedure

To run uninstall:

- Select **Start > Settings > Control Panel > Programs and Features**.
- Select **IBM OnDemand Clients V10.1** from the list.
- Click **Uninstall**.

Chapter 5. Adding or removing Content Manager OnDemand client components

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

Before you begin

If you are installing a newer version of the Content Manager OnDemand client, you cannot add or remove components. Once the installation completes you can re-run the installation to add or remove components.

Procedure

To add or remove components:

1. Start the Content Manager 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.

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 a USGCB environment

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

Federal Desktop Core Configuration (FDCC) on 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 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 and administration client

1. Before you use the Windows client or the administration client, add the library server to the FDCC system.
2. If the Windows client and the 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 Vista or later: %APPDATA%\IBM\OnDemand Client

AFP Web Viewer, Image Web Viewer

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

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 plug-ins**, 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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