

IBM Content Manager



CommonStore for SAP Client Installation and User's Guide

Version 8.1

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Note!

Before using this information and the product it supports, be sure to read the general information under “Notices” on page 89.

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This edition applies to Version 8.1 of IBM Content Manager CommonStore for SAP, program number 5724-B87, and to all subsequent releases and modifications until otherwise indicated in new editions.

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About this book

This book provides detailed information on the following subjects:

- Installing and configuring the CommonStore for SAP Client for use with your SAP R/3 system
- Using the CommonStore for SAP Client

This book is divided into the following parts:

- Part 1, “CommonStore — overview” on page 1. Introduces CommonStore for SAP.
- Part 2, “CommonStore Client installation” on page 9. Describes the installation of the CommonStore Client.
- Part 3, “Client customization guide” on page 19. Describes how to customize the CommonStore Client.
- Part 4, “SAP customization guide” on page 45. Explains how to use the CommonStore Client for archiving and viewing electronic documents.

Who should read this book

This book is intended for administrators, who are responsible for the deployment of CommonStore for SAP Clients, and for end users. Administrators should have in-depth knowledge of CommonStore for SAP and the archive system that they intend to use.

What’s new in this version

CommonStore for SAP Version 8.1 offers you the following new features:

1. Facility to switch between different server connections. See “Switching server connections” on page 70.
2. Archiving of documents in FAX format
3. Content Manager Version 8 support.

Release information

The customizing information presented in this book refers to SAP Releases 3.0, 3.1, 4.0, 4.5, 4.6, mySap.com and all subsequent releases.

Conventions and terminology used in this book

This section describes the abbreviations, acronyms, and highlighting conventions used in this book.

Product names

To facilitate reading, the product name CommonStore for SAP is most of the times shortened to CommonStore. Content Manager OnDemand is often abbreviated to CMOD. Likewise, the names ADSM or TSM refer to ADSTAR Distributed Storage Manager and Tivoli® Storage Manager.

Throughout this book, the brand name VisualInfo™ refers to the products IBM EDMSuite™ VisualInfo and IBM Content Manager. The name OnDemand refers to the products IBM EDMSuite OnDemand and IBM Content Manager OnDemand.

Since SAP Release 3.1, the names of some program components and products have changed. The change is hinted at on the first occurrence of such a name.

Highlighting conventions

Highlighting is necessary to set product-related terms, product elements, and code examples off from the text flow. This book uses the following highlighting conventions

Throughout this book, *italics* are used for

- Book titles
- Emphasis
- Options / variables / parameters / keywords

Boldface is used for the following elements:

- Check box labels
- Choices in menus
- Column headings
- Commands and subcommands
- Entry fields
- Field names in windows
- Forms and subforms
- Index classes
- Items
- Menu-bar choices
- Menu names
- Radio button names
- Spin button names

Monospace is used for

- Coding examples
- Entered data
- Group and user IDs
- Message text
- Transaction codes (T-codes)

Underlined bold indicates default values.

How to send your comments

Your feedback is important in helping to provide the most accurate and high-quality information. If you have any comments about this book or any other CommonStore documentation:

- Visit our home page at <http://www.ibm.com/software/data/commonstore/>. There, you find the feedback page where you can enter comments and send them.
- Send your comments by e-mail to swsdid@de.ibm.com. Be sure to include the name of the book, the part number of the book, the version of CommonStore, and, if applicable, the specific location of the text you are commenting on (for example, a page number or table number).

- Fill in one of the forms at the back of this book and return it by mail, by fax, or by giving it to an IBM representative. The mailing address is on the back of the Readers' Comments form. The fax number is +49-(0)7031-16-4892.

List of Abbreviations

The abbreviations used in this document are listed in Table 1.

Table 1. Abbreviations used in this book

ADK	Archive Development Kit
ADSM	ADSTAR Distributed Storage Manager
AIX[®]	Advanced Interactive Executive (IBM implementation of UNIX)
ALF	Advanced List Format
API	Application Program Interface
AS/400	Application System/400 [®]
COLD	Computer Output on Laser Disk
crontab	Chronological Table
DBA	Database Administrator
DLL	Dynamic Link Library (files with the extension .dll)
DMS	Document Management System (Document Administration System)
GUI	Graphical User Interface
IAC	Internet Application Component
ITS	Internet Transaction Server
NT	New Technology (Microsoft operating system Windows NT [®])
OCR	Optical Character Recognition
OLE	Object Linking and Embedding
OS/2[®]	Operating System/2 [®]
OS/400[®]	Operating System/400 [®]
OTF	Output Text Format (files with the extension .otf)
PDF	Portable Document Format (files with the extension .pdf)
R/3	SAP R/3 system
S/390[®]	System/390 [®]
SAP	Systems, Applications, Products in Data Processing (software vendor)
TCP/IP	Transmission Control Protocol/Internet Protocol
TIFF	Tagged Image File Format (files with the extension .tif)
UNIX[®]	An operating system developed at Bell Laboratories
URL	Uniform Resource Locator

Part 1. CommonStore — overview

Chapter 1. What is CommonStore for SAP

CommonStore and the SAP R/3 Archiving Interfaces

Starting with Release 2.2 of the R/3 system, SAP clearly recognized the requirement of enhancing R/3 through a robust archiving concept. Step by step, mechanisms evolved for offloading the operational R/3 database and processing business documents that reside in an external archiving system. With Release 3.0, all key applications and modules offered mature archiving functionality that was shipped as part of the standard R/3 package. These new features leveraged the power of tools like the SAP Business Workflow, Document Management System, SAPoffice, SAPconnect, or Archive Development Kit.

While the enhanced application logic for handling external documents is fully integrated with R/3, SAP decided to leave the core archiving functionality to established business partners as part of their complementary software program. The SAP Business Framework provides the interfaces necessary to integrate these external functions with R/3 and thus create the complete software architecture that fits the customer's business processes while protecting software and hardware investments. With mySAP.com, SAP established a new software partner program that, like its predecessor, is committed to provide third-party vendors with integration consulting and standard, release-stable interfaces to connect their external products to R/3. As the primary interface for integrating storage and content management systems, BC-AL (SAP ArchiveLink) has been introduced with Release 2.2 and enhanced in Releases 3.0, 3.1, and 4.5 of the R/3 system. Additionally, BC-HCS (SAP HTTP Content Server Interface) has been defined in R/3 Release 4.5 as a subset of BC-AL that focuses on content rather than storage management. SAP offers its software partners certification for each of these interface releases.

Only a solution that builds on BC-AL or BC-HCS leverages the archiving potential of the enabled R/3 modules. IBM Content Manager CommonStore for SAP (hereinafter referred to simply as CommonStore) is such a solution. While SAP uses the term *optical archive* to refer to a system that complies with the BC-AL specifications, this expression is misleading in that conformance with BC-AL is independent of hardware components used by the archive supplier (for example, optical storage media or scanners). In later R/3 releases, the more general wording *external archiving system* or *external archive* appears in SAP publications. This term will be used throughout this document when referring to products based on BC-AL.

BC-HCS is a general, cross-application interface that connects the enabled R/3 business applications to a *content server* and allows them to process documents in logical *content repositories*. This content server can be a database, a file server, an R/3 system, or an external archive like CommonStore. To elucidate the relevance of BC-HCS in the R/3 archiving context, only the last constellation will be considered in this section.

The BC-HCS interface is completely based on the industry-standard HTTP (Hypertext Transfer Protocol); servers and documents are addressed and parameters and functions are transmitted between CommonStore and the R/3 application server using URLs (Universal Resource Locators). While both concepts

are typically used to access objects on the World Wide Web, CommonStore primarily focuses on BC-HCS to exchange content within a corporate intranet.

CommonStore integrates with BC-HCS to perform functions like:

- Storing, updating, or appending documents in a content repository
- Retrieving entire documents or document segments from a content repository
- Obtaining information about documents and their components
- Searching documents for text patterns (without retrieving them)
- Performing attribute-based searches (on print lists, especially journals)
- Deleting documents

To inhibit unauthorized access to archived documents, CommonStore applies security measures to prevent the forgery or manipulation of URLs and eavesdropping on contents. These measures include the use of a PKCS#7 digital signature and public key procedure according to the Digital Signature Standard. The degree of protection and rights of access to a document can be specified when a document is stored by R/3.

As the name implies, a content server in the BC-HCS scenario exclusively acts as a Web server that is contacted by R/3 to perform various functions. Unlike the R/3 system which acts as a Web client, a content server like CommonStore is unable to instigate communication between the two components.

To support archiving functions and scenarios that cannot be covered by the client/server perspective BC-HCS is based on, CommonStore supports the additional protocols covered by BC-AL. In their entirety, the supported BC-AL 4.5 functions (which have not been changed with R/3 Release 4.6 or mySAP.com) comprise:

- BC-HCS (as described above)
- A BAPI (Business Application Programming Interface) for archiving documents with bar codes
- OLE (Object Linking and Embedding) functionality for storing inbound documents or PC files and starting external viewing applications (for example, archive clients) on 32-bit Windows frontends

When used with R/3 releases prior to 4.5 (the first R/3 release to support BC-HCS), CommonStore realizes the operations now covered by BC-HCS through RFCs (Remote Function Calls), a communication protocol defined by SAP. In releases 4.5 and 4.6, HTTP messages replace the corresponding RFCs.

All BC-AL operations are based on the notion that the SAP database represents a master index catalog of all documents, including those whose content resides in the external archive. According to the approach, BC-AL passes no document-related information to the external archiving system. Instead, a symbolic UUID (Universal Unique Identifier) is created for each document and applied to identify it throughout its life cycle. BC-AL itself maintains a table that maps each business document (for example, credit memo or customer invoice) to its corresponding UUID. For many SAP users, however, it is a requirement to access archived documents independently of R/3 or mySAP.com (that is, without using SAPGUI or the mySAP.com workplace). For this case, to support searching the external archive for business information like customer number or fiscal year, CommonStore provides proprietary function modules that transfer these respective document attributes from R/3 to the archive database.

Chapter 2. Scenarios and features

As there are diverse applications for archiving and content management in the SAP R/3 and mySAP.com environments, integrating CommonStore into the SAP landscape can bring multiple benefits. In the following sections, the most important aspects will be discussed, distinguishing *data archiving* (driven by system administration) and *document archiving* (driven by business process optimization).

Data archiving

When an R/3 system goes into production, its database usually has a size that allows efficient storage of data on local hard disks of the database server. While new data is entered and generated during production, the database size increases continually. This approximately linear database growth depends on the intensity of system usage and may easily reach rates of 30 to 50 percent per annum.

This rapid evolution has several inadvertent side effects:

- Since the physical tables are usually stored on hard disks directly attached to the database server, an **increase in hard disk requirements** is unavoidable.
- Due to an **increase in administration effort** for the database, maintenance windows (for example, for system backup) claim unacceptable amounts of time. The increased number of rows per database table delays basic operations (for example, searching tables). The accumulation of these delays leads to a perceptible **degradation of response times** when accessing the database.

As practical experience has shown, the database growth noticeably affects the system performance and administration effort within one to two years of usage.

SAP recommends archiving application data to reduce database growth and counteract its consequences: "Nearly all customers will thus (have to) archive data which is no longer needed for online operation." (translation from the official SAP document *BC – Archivieren und Löschen von Anwendungsdaten* as of R/3 Release 3.1). This process removes mass data from the system which is not actively used. CommonStore can be employed to perform the task of archiving inactive data concurrently with normal system operation.

Especially for SAP customers within the European Economic and Currency Union, the launch of the new Euro currency raises additional issues related to the R/3 database size. Though SAP itself provides the functionality relevant for the LCC (local currency changeover), this operation still requires system downtime for the conversion of currency-related database fields. This downtime is approximately proportional to the respective table sizes. SAP advises: "Data archiving offers a way to consistently reduce database tables, therefore you should seriously consider whether to implement it in the period before local currency changeover." (extract from the white paper *SAP Data Archiving and the Euro*, Version 3.0). Using CommonStore to remove inactive currency data from the operational database minimizes the total conversion downtime and the run time of a database restore in case the LCC should fail.

Application data archived through CommonStore:

- Can be **stored on external media** independently of R/3 (for example, optical media or magnetic tape).

- Will be **compressed by up to a factor of 5** during archival.
- Is accessible by R/3 at any time and can even be **analyzed in the external archive**.
- Is **not affected by hardware or release changes** of the R/3 system.

Document archiving

For legal and/or internal policy reasons, companies are required to keep records for a certain period of time.

Conventionally filing these documents on paper or in microfiche archives results in:

- Extensive cost for **duplicating or filming** the documents to be stored.
- Expenditures for the **physical storage** of paper or microfiche media.
- Inefficient **retrieval** of stored documents.

However, most business processes supported by R/3 allow processing documents electronically (as opposed to a paper-based process).

The benefits of this approach include:

- The ability to use **cost-efficient storage media** for the document repository.
- **Direct access** by all authorized users without the delay caused by conventional archive inquiries.
- **Parallel access** by several users at the same time.
- The option of leveraging *SAP Business Workflow* to **improve existing work routines**.
- **Increased customer satisfaction** through optimized processes.

CommonStore is capable of handling different kinds of electronically represented documents.

The following groups of document types should be differentiated:

- *Inbound documents* (for example, supplier invoices) that reach the enterprise via mail or telefax and are stored as rasterized images. For this document type, the advantages of using CommonStore come to light most apparently.
- *Outbound documents*, which are normally printed and sent to their respective recipient. CommonStore not only provides for fast retrieval in case of internal or external audits, but also for quick referral on inquiries by customers or suppliers.
- *Reports and print lists* (for example, journals), which are generated by R/3 and would normally be printed. The use of CommonStore typically makes a physical printout obsolete. The electronic journal (as opposed to its paper equivalent) is easily searchable and can even contain *hyperlinks* to other documents (as an example, a specific entry in a document journal might refer to a scanned original document). Furthermore, the archived lists can be used as input to other applications like data mining systems.
- *Desktop files* created by PC applications (for example office, or CAD applications) can be stored by CommonStore and accessed by R/3 via *SAP office* or *DMS*.

In addition to these “basic” document types handled by CommonStore, a typical requirement for an archiving system is to store documents from external

applications and make them available to R/3 users. This particularly includes COLD (computer output on laser disc) that was generated outside of R/3.

Part 2. CommonStore Client installation

Chapter 3. Prerequisites

SAP R/3 and archive system installations are in use in companies ranging from global trusts with very high document volumes to mid-sized companies with a few hundred invoices per day. This bandwidth is responsible for the large variations in customer demands regarding performance, availability, and the scalability of the corresponding systems. CommonStore takes this factor into account by supporting a wide variety of hardware platforms from which customers are free to choose on the basis of the demands of the application scenario at hand. While CommonStore itself runs on AIX, Windows NT, Digital UNIX, HP-UX, OS/400, and, upon request other platforms, the main archiving load can be distributed among every system supported by Tivoli Storage Manager, Content Manager OnDemand, or Content Manager, ranging from an OS/2-based PC to an S/390 mainframe computer. Through the flexible hardware support offered by Tivoli Storage Manager, CommonStore also allows the storage of SAP R/3 documents on quite arbitrary storage media, including hard disks, tape drives, optical media, or corresponding library systems.

Prerequisites for using the CommonStore Archiving Client

The CommonStore Archiving Client requires the following hardware and software:

- Intel Pentium 166 MHz compatible machine with 32 MB RAM
- Windows NT SP 5, Windows 98, Windows ME, or Windows 2000 SP 1
- Microsoft Internet Explorer 4 or higher
- Microsoft Internet Explorer Plug-Ins for different document types
- CommonStore Server 1.6.x or higher

Prerequisites for using the CommonStore Viewing Client

The CommonStore Viewing Client requires the following hardware and software:

- Intel Pentium 166 MHz compatible machine with 32 MB RAM
- Windows NT SP 5, Windows 95/98, Windows ME, or Windows 2000 SP 1
- For browser viewing:
 - Microsoft Internet Explorer 4 or higher, Netscape Communicator 4 or higher
 - Browser plug-ins for different document types
- CommonStore Server 1.6 or higher

Chapter 4. Installing the CommonStore Client packages

The CommonStore Client consists of the following components:

- The CommonStore *Archiving Client* is used **only** for archiving incoming documents.
- The CommonStore *Viewing Client* is used **only** for viewing documents.

Both CommonStore clients require a running CommonStore Server for processing the archiving, retrieving, and viewing requests.

The CommonStore Archiving Client

The CommonStore Archiving Client is used for the entire communication between the SAP GUI with the archiving system on 32-bit Windows systems. It is needed only for archiving incoming documents.

With the CommonStore Archiving Client, scanned documents are archived in combination with SAP R/3. The CommonStore Archiving Client supports early (via OLE or RFC call), simultaneous, and late archiving (via bar code, or via OLE).

The CommonStore Archiving Client can handle documents from the following sources:

- File system (DirQueue)
- Kofax Ascent Capture Release Module (FileQueue)
- VisualInfo workbaskets (VIQueue)

The GUI of the CommonStore Archiving Client is illustrated in Figure 1 on page 14.

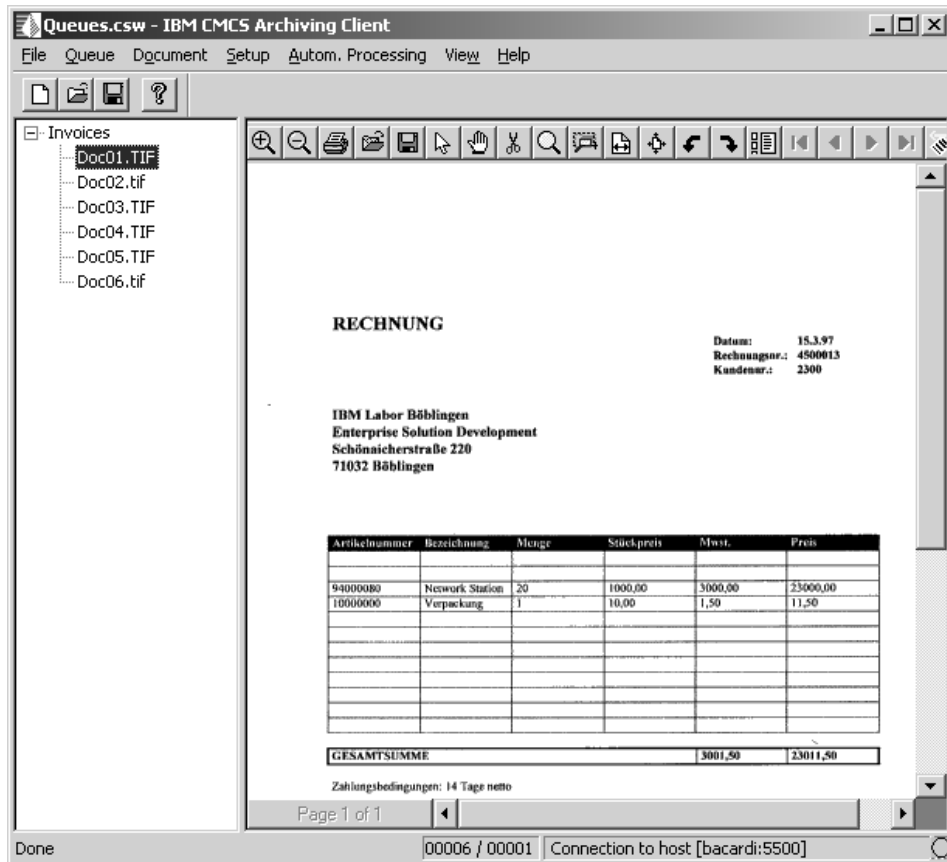


Figure 1. CommonStore Archiving Client's GUI

In the left frame of the application window, you can see the queues, which correspond to the SAP R/3 input area for early, late, and simultaneous archiving. In the right frame, you can see the documents contained in a queue, the corresponding recognized bar code, and the date on which the documents have been scanned. When selecting a document in the left frame, it is displayed in the right frame.

The CommonStore Archiving Client can archive documents (using the CommonStore Server) into all supported archive systems:

- Tivoli Storage Manager
- Content Manager
- Content Manager OnDemand

CommonStore supports the document archiving scenarios supplied by SAP:

1. **Early archiving:** This scenario is used if incoming documents are scanned as soon as they arrive. The documents are archived from a scan workstation that runs the CommonStore Archiving Client, which continuously creates work items in the SAP workflow. Later on a clerk has to enter the booking.
2. **Late archiving:** Using this scenario, incoming documents routed in paper format through the company. A clerk enters the booking, applies a bar code on the paper, and sends the paper document to the archiving department where the documents are scanned. The bar code is recognized by the scanning software. Via the CommonStore Archiving Client the documents are archived and the bar code is sent to R/3, which links the document to the booking.

3. **Simultaneous archiving:** This archiving scenario works as follows. Incoming documents are archived when the clerk creates the booking. Therefore the clerk works with a split screen. On one side is the SAP GUI (enter the booking) and on the other is the CommonStore Archiving Client (select the corresponding document). After the clerk entered the booking, the document is archived and linked automatically.

Installing the package

Load the CommonStore product CD into the CD drive and start the installation program `setup.exe` located in the directory `CSCClient`.

Run through the installation procedure and choose the installation path and language that you want to install.

In the installation directory, the following files will be allocated:

- The CommonStore Archiving Client's executable, `CSCClient.exe`.
- The CommonStore modules `DirQueue.csm`, `FileQueue.csm`, and `VIQueue.csm`. These modules will be saved in a subdirectory named `Module` created during the installation procedure.
- Sample documents in TIFF format (SAP R/3 document class FAX) located in subdirectories `queues\dir` (destined for `DirQueue`) and `queues\file` (destined for `FileQueue`).

Note

All the settings configured during the setup of the CommonStore Archiving Client will be written to the Windows registry and the `CSCClient.INI` file.

The CommonStore Viewing Client

The CommonStore Viewing Client is used for viewing SAP R/3 documents with a customized external viewer, for example a Web browser or the Wang Image Viewer, by means of Object Linking and Embedding (OLE).

The CommonStore Viewing Client handles the communication:

- With R/3 via OLE
- With the CommonStore Server via sockets

As shown in Figure 2 on page 16, the CommonStore Viewing Client makes it possible to use external viewers (Alternative 2) other than the standard ArchiveLink Viewer (Alternative 1) provided by the SAP R/3 System.

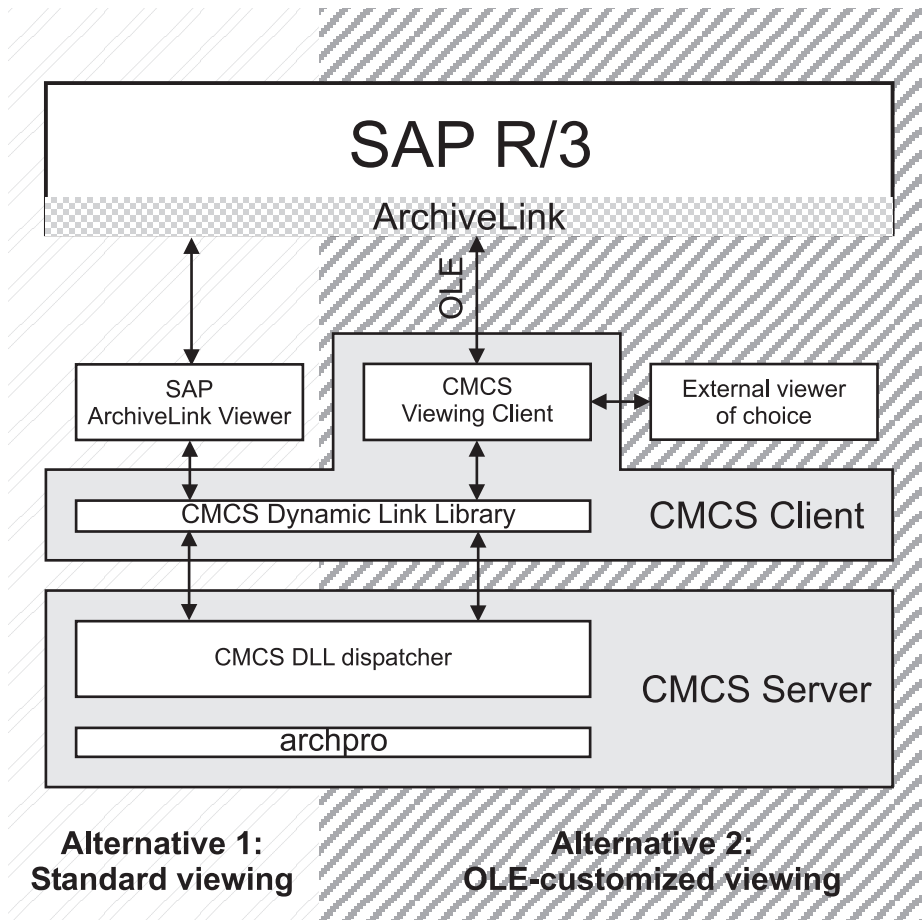


Figure 2. Standard versus OLE-customized viewing

Installing the package

Load the CommonStore product CD into the CD drive. Start the installation program setup.exe located in the directory CSView.

Run through the installation procedure and choose the installation path and the language that you want to install.

In the installation directory, the CommonStore Viewing Client executable CSView.exe will be saved.

When starting the CommonStore Viewing Client manually for the first time, entries will be made to the Windows registry to make it possible for SAP R/3 to detect the CommonStore Viewing Client.

Note

All the settings configured during the setup of the CommonStore Viewing Client will be written to the client configuration profile (default name: CSClient.ini) situated in the Windows directory.

Chapter 5. Upgrading to Version 8.1

You must upgrade the CommonStore Archiving Client and the CommonStore Viewing Client separately. This is described in the subsequent sections.

Upgrading from Version 1.x to Version 8.1

Upgrading from CommonStore Version 1.x to Version 8.1 is performed separately for the CommonStore Archiving Client and the CommonStore Viewing Client. This is described in the subsequent sections.

Upgrading the CommonStore Archiving Client

To upgrade the CommonStore Archiving Client from Version 1.x to Version 8.1, proceed as follows:

1. Install the CommonStore Archiving Client. See also “Installing the package” on page 15.
2. Set up the CommonStore Archiving Client. When starting up the CommonStore Archiving Client for the first time, a panel pops up in which settings according to your environment and your preferences can be entered. See also “Setting up the CommonStore Archiving Client” on page 21. An initial setup is mandatory, but can also be changed at any later point in time via the CommonStore Archiving Client menu selection **Setup** → **Run Setup** or **ALT+F8**.
3. Create queues in the CommonStore Archiving Client. See also “Creating queues” on page 25.
4. Save your CommonStore Archiving Client working environment. See also 73.
5. Make sure that the value for the keyword ARCHWINS in the server configuration profile (default name: archint.ini) is greater than zero.
6. Register the CommonStore Archiving Client application in SAP R/3 (see also “Registering an OLE application in SAP” on page 58).
7. Load the TypeLib information for the CommonStore Archiving Client (see also “Loading the TypeLib information” on page 58).
8. Create an ArchiveLink application (see also “Creating an ArchiveLink application” on page 58).
9. Customize the ArchiveLink application for archiving via the CommonStore Archiving Client (see also “Customizing the ArchiveLink application for the CommonStore Archiving Client” on page 58).
10. Open the protocol which had been used up until now to archive with the CommonStore Client 1.x.
11. Customize the ArchiveLink protocol for archiving via the CommonStore Archiving Client (see also “Customizing the Archlink protocol for viewing documents” on page 62).

After having performed the steps described above, the entry in the protocol named **Display object** (first entry) must be made to point to the ArchiveLink application which had been used up until now to archive with the CommonStore Client Version 1.x.

The entry for communication step **Archive from frontend** in the protocol must now be made to point to the newly-created ArchiveLink application. As a consequence, archiving calls will now be directed to the CommonStore Archiving Client Version 8.1.

Upgrading the CommonStore Viewing Client

You can leave the settings in SAP R/3 as they are.

You might consider using browser viewing to have the option of viewing different types of document classes with the same viewer. You should therefore refer to “Setting up the CommonStore Viewing Client” on page 33 for more information.

Upgrading from Version 2.1.x to Version 8.1

Upgrading from CommonStore Version 2.1.x to Version 8.1 is performed separately for the CommonStore Archiving Client and the CommonStore Viewing Client. This is described in the subsequent sections.

Upgrading the CommonStore Archiving Client

To upgrade the CommonStore Archiving Client from Version 2.1.x to Version 8.1, proceed as follows:

1. Ensure that you saved your working environment, which can be done by the menu path **File → Save As**.
2. Install the CommonStore Archiving Client Version 8.1. See also “Installing the package” on page 15.
3. Run the CommonStore Archiving Client Version 8.1. When starting up the CommonStore Archiving Client for the first time, a panel pops up in which settings according to your environment and your preferences can be entered. See also “Setting up the CommonStore Archiving Client” on page 21.

All other settings remain the same as in Version 2.1.x and should have been done when the CommonStore Archiving Client Version 2.1.x was installed.

Upgrading the CommonStore Viewing Client

To upgrade the CommonStore Viewing Client from Version 2.1.x to Version 8.1, proceed as follows:

1. Install the CommonStore Viewing Client Version 8.1. See also “Installing the package” on page 16.
2. Run the CommonStore Viewing Client Version 8.1. When the CommonStore Viewing Client setup dialog pops up, you can enter the settings according to your environment and your preferences. For detailed information see “Setting up the CommonStore Viewing Client” on page 33.

All other settings remain the same as in Version 2.1.x and should have been done when the CommonStore Viewing Client Version 2.1.x was installed.

Part 3. Client customization guide

Chapter 6. CommonStore Archiving Client

You must customize the components of the SAP Client separately. This chapter explains how to customize the CommonStore Archiving Client.

Getting started

The following steps need to be performed before you can start archiving with the CommonStore Archiving Client:

1. Install the CommonStore Archiving Client. See also “Installing the package” on page 15.
2. Perform the CommonStore Archiving Client setup. When starting up the CommonStore Archiving Client for the first time, you will be guided through a number of setup panels in which you can enter settings according to your environment and your preferences. See also “Setting up the CommonStore Archiving Client”. An initial setup is mandatory, but you can change the setup at any later point in time via the CommonStore Archiving Client menu selection **Setup → Run Setup** or **Alt+F8**.
3. Create queues in the CommonStore Archiving Client. See also “Creating queues” on page 25.
4. Save your CommonStore Archiving Client working environment. See also 73.
5. Make sure that the value for the keyword ARCHWINS in the CommonStore Server configuration profile (default name: archint.ini) is greater than zero.
6. For archiving via OLE, run through the SAP customizing procedures needed for Early archiving via OLE explained in Chapter 9, “Early archiving via OLE” on page 47.

Setting up the CommonStore Archiving Client

When running the CommonStore Archiving Client for the first time you will be notified and the setup dialog is started automatically.

Start the setup panel by clicking **Setup → Run Setup** on the main menu or alternatively by pressing **Alt+F8**. On the panel shown in Figure 3 on page 22, you must enter various settings. Clicking the **OK** button initiates a validity check. If the settings are correct, they are saved. Clicking the **Cancel** button leaves all settings unchanged and closes the panel.

Note

When you launch the setup panel, the connection to the specified CommonStore Server is checked and the connection status information on the setup panel (icon) and on the status bar is refreshed.

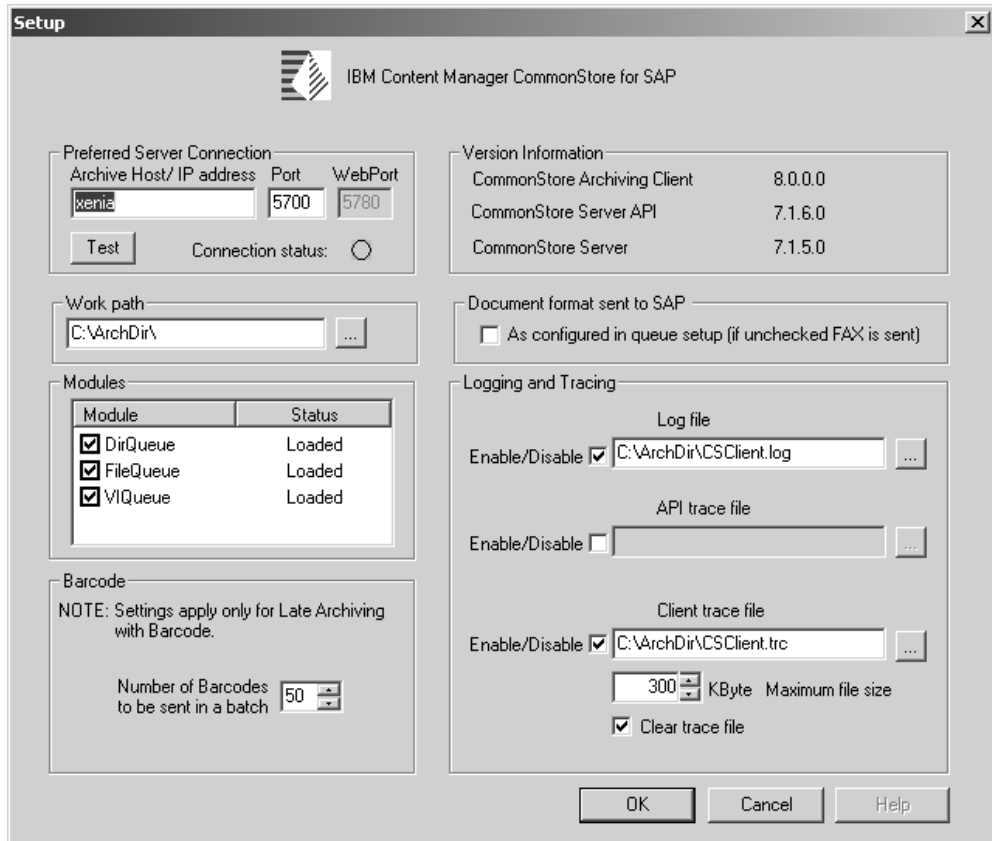


Figure 3. CommonStore Archiving Client setup dialog

Server connection

This group holds all connection-related settings.

- Archive Host/IP address** Name or IP address of the machine that the CommonStore Server is running on. The default value is 127.0.0.1.
- Port** Port number specified in the CommonStore Server configuration file (default name: archint.ini) under the keyword ARCHWIN_PORT. Default value is 5500.
- Webport** Port number specified in the CommonStore Server configuration file (default name: archint.ini) under the keyword WEBPORT.

Note:

The **WebPort** field will be filled automatically if you are connecting to the CommonStore Server after clicking either the **Test** or **OK** button and a connection could be established. If you are using version 2.1.x or lower of the CommonStore Server, you must fill in the correct **WebPort** manually.

Test

You can use the **Test** button to check the connection between the CommonStore Archiving Client and the CommonStore Server. If a connection can be established, you see a green circle right beside the button and in the status bar:



If a connection cannot be established, you see a red cross:



Work path

The Work path is set to the installation directory by default but can be changed if necessary. The CommonStore Archiving Client uses this directory for processing various tasks. Temporary files will be allocated in this directory. Enter the directory name either manually or use the directory browser button.

Modules

Depending on which scanning application is being used to scan in the paper documents, the electronic information concerning these documents will be allocated in different ways. The CommonStore Archiving Client supports the following types of scanning applications:

1. Scanning applications which merely create the electronic documents in a specified directory. The **DirQueue** module is used for this scenario.
2. Scanning applications which create a description file in addition to the electronic documents. For each scanned document, an entry is added to the description file. Depending on the configuration of the scanning application, you can also use Optical Character Recognition (OCR). The recognized information is then saved in the description file as part of the entry for the scanned document. An entry created in, for example, the Kofax Ascent Capture description file, looks like this:
`"Bar codes","1289003","d:\CSClient\queues\invoices\doc1.tif"`
3. Where 1289003 is the recognized bar code and `"d:r\sclient\queues\invoicesr\oc1.tif"` is the fully qualified file name of the electronic document created by Kofax Ascent Capture. The **FileQueue** module is used for this scenario. You get a description file in the format shown above, even if you do not use Kofax Ascent Capture.
4. Scanning applications that scan documents and transfer them directly to a Content Manager workbasket. Use the **VIQueue** module for this scenario.

These modules reside in the subdirectory module of the installation directory. They are on the **Modules** list, where the module name and the status are shown. When you start the CommonStore Archiving Client for the first time, all modules have the status *Not Loaded*.

Depending on which scanning scenario you are using, check the box in front of the according modules so that the module status turns from *Not Loaded* into *Loaded*. You can select more than one module.

Note

If the modules located in the subdirectory module have not the same version as the CommonStore Archiving Client, the module status is *Wrong Version*. This can occur if you have not installed the CommonStore Archiving Client in the right way.

Bar code

During late archiving, documents will be archived via the CommonStore Archiving Client. For each document, this is basically a two-step action. The electronic document will be archived first. The bar code together with the archive document ID will then be sent to the SAP system if archiving was successful.

For mass archiving, you can optimize the performance by specifying the number of bar codes which are to be transferred together in one batch to the SAP system, thus eliminating the need for establishing separate links for each single document. This bundling effect will be achieved by entering a value greater than 1 for the number of bar codes. The maximum number of bar codes to be sent in one batch is 50.

Version information

This group displays the versions of the CommonStore Archiving Client, the CommonStore Server API (CSClient.dll), and the CommonStore Server if a connection is established.

Document format sent to SAP

When you want to view an archived document, you usually click the appropriate business object on the SAP GUI. In doing so, you start a viewing application that displays the document.

In SAP R/3 versions prior to 4.0, you can associate a viewing application with an archived document only if the document format registered in SAP is FAX. This was changed in later versions, which allow you to associate a variety of formats with external viewing applications.

Therefore, if your R/3 version is 4.0 or higher, check the **As configured in queue setup** box. If your SAP R/3 version is older, leave the box unchecked.

Logging and tracing

The CommonStore Archiving Client provides logging and tracing facilities. If logging is enabled, the CommonStore Archiving client writes a protocol with information about the performed actions into a log file. In case of errors, additional information is added to the log file. For more detailed information, enable the tracing facility. It writes detailed information into a trace file. Only enable the tracing facility if errors occurred because tracing lowers the performance. In error cases the CommonStore Server API tracing facility can be enabled to get more detailed information about the communication steps between the CommonStore Archiving Client and the CommonStore Server.

In front of the text field for each file name there is a check box for enabling or disabling the according facility. If a facility is disabled, the affected fields are grayed out.

Log File	Enter the full path and the file name of the log file, for example: C:\CSCClient\CSCClient.log
	You can also use the file browser right beside the text field.
API trace file	Enter the full path and the file name of the API.
Client trace file	Enter the full path and the file name of the trace file, for example: C:\CSCClient\CSCClient.trc
	You can also use the file browser right beside the text field.
Maximum file size	Enter a maximum size in kilobytes to limit the disk space that the trace file can occupy. If the specified size is exceeded, the trace file will be truncated.
Clear trace file	Enable this check box only if you want to clear the trace file each time the CommonStore Archiving Client is started. It is recommended that the trace file is not cleared (unchecked). This is because if ever highly intermittent errors occur, as much data as possible about all preceding actions is needed to be able to analyze the cause.

If all settings have been customized, commit them by clicking the **OK** button or by pressing the **ENTER** key. Your entries are verified and the connection to the CommonStore Server is checked. If the verification runs without errors, the dialog box is closed. If errors occur, you receive an error message. You can discard your changes by clicking the **Cancel** button or by pressing the **ESC** key.

Creating queues

To separate the different types of documents, you must create a queue for each document type. For example, if you intend to work with invoices, create a queue named Invoices for archiving scanned invoices. Or, if you intend to work with orders, create a queue named Orders for scanned orders.

To create a queue, click **Queue → New Queue** or press **Ctrl+1** to start a wizard leading you through the following sequence of panels:

1. Queue
2. One of the following panels, depending on the queue type you selected on the Queue panel:
 - Directory Queue
 - File Queue
 - Content Manager Queue
3. Connection Properties
4. End

The settings that you must enter on each panel are discussed in the following sections.

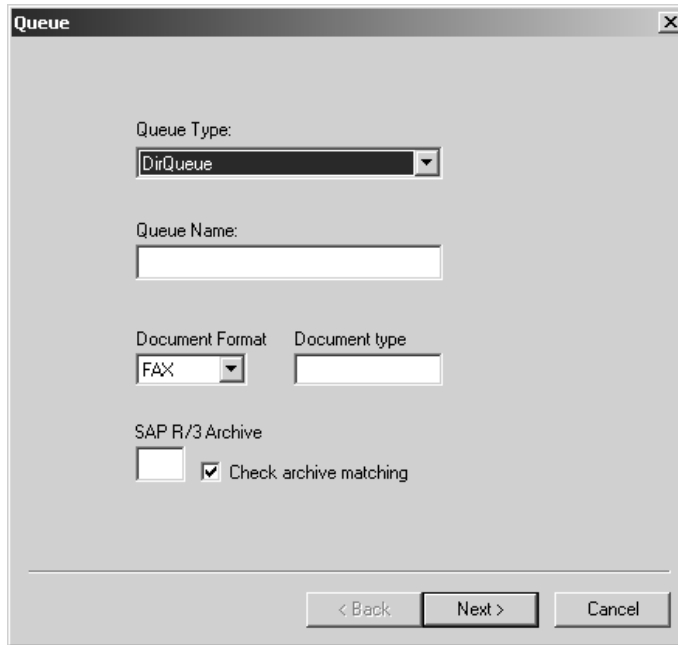


Figure 4. The Queue panel

In this panel, you specify the settings for the queue, as follows:

- Queue Type** Choose the module corresponding to your type of scanning application (see also “Modules” on page 23). In the drop-down list, you can choose only from a list of modules which have already been loaded. Modules can be loaded in the setup dialog (see “Setting up the CommonStore Archiving Client” on page 21).
- Queue Name** Enter a name that reveals the purpose of this queue, such as Invoices, if this queue will be used to archive incoming invoices. This field needs not to be entered if you have chosen the queue type **Content Manager Queue**.
- Document Format** Due to the fact that, in earlier releases, SAP supported only a restricted number of document formats, CommonStore offers the possibility of extending the list of formats which can be displayed, provided OLE and browser viewing are used for displaying the document. This can be done as follows:

1. In SAP, customize the OLE for FAX document class for the following functions:
 - Archiving. See Chapter 17, “Perform early archiving with OLE” on page 79.
 - Viewing. See Chapter 20, “Viewing documents via OLE” on page 85.
2. In the CommonStore Archiving Client, you must choose the format of the of the documents in that queue when setting up a queue, for example GIF for documents in Graphics Interchange Format format.

Notes

- Select the appropriate radio button for the document class in the SAP customizing, for example **FAX** if you want to customize viewing documents archived in TIFF format or **PDF** if you want to customize viewing documents archived in PDF format.
- Not all document formats are supported by all versions of the CommonStore Server. The CommonStore Archiving Client will therefore display a list of document formats corresponding to the supported formats of the CommonStore Server version to which it is connected.
- When archiving a document, the CommonStore Server receives information on the document’s real format (for example GIF) and saves this information.

3. If browser viewing is used by the CommonStore Viewing Client, the CommonStore Server checks for the saved format information when receiving a call for displaying an archived document, and sends format information to the Web browser, which in turn launches the proper plug-in for that document format.

Note

The plug-in must be installed and registered with the browser on the viewing workstation.

The CommonStore Server sends format information to the Web browser by setting the MIME type. With the CommonStore Server package, a file named `csmimes.properties` is installed. This file contains the 1-to-1 mapping of the document format to the corresponding MIME types.

Excerpt from the CommonStore Server file `csmimes.properties`:

```
FAX=image/tiff
PDF=application/pdf
```

If these MIME types do not correspond to your environment, edit the entries appropriately.

Document type

The CommonStore Archiving Client is able to perform Early Archiving without OLE and not triggered from SAP GUI as in previous releases. Therefore you have to specify the SAP WFL document type that should be used for Early Archiving. When archiving incoming invoices you specify, for example, FIINVOICE.

- SAP R/3 archive** Enter the name which is customized in R/3 (transaction code OAC3) for the SAP document class that is to be handled by this CommonStore Archiving Client queue.
- Check matching** If this check box is enabled, the system always checks during archiving via Object Linking and Embedding (OLE) whether the specified SAP R/3 archive ID corresponds to the archive ID received with the OLE call. It is recommended that you enable this checking facility.

Important

You cannot create a queue while automatic processes are running.

Module-dependent settings

Depending on the module which you selected under Queue Type in the Queue panel, one of the following panels for entering module-dependent settings will appear.

Directory Queue panel

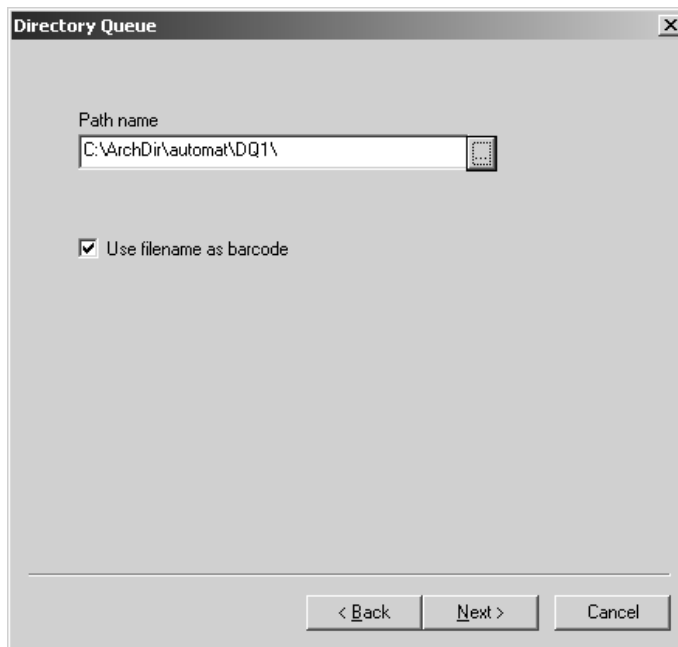


Figure 5. The Directory Queue panel

Enter the following settings:

- Path name** Path where the CommonStore Archiving Client expects the electronic documents to be created by the scanning application. For example, if the scanning application is set up to create electronic documents representing invoices in the directory c:\CSCClient\Invoices, then enter this path. You can browse through the file system using the directory browser button.
- Use file name as bar code** If this check box is enabled, the file's name is used as the bar code. If it is disabled, there is no information about the bar code.

File Queue panel

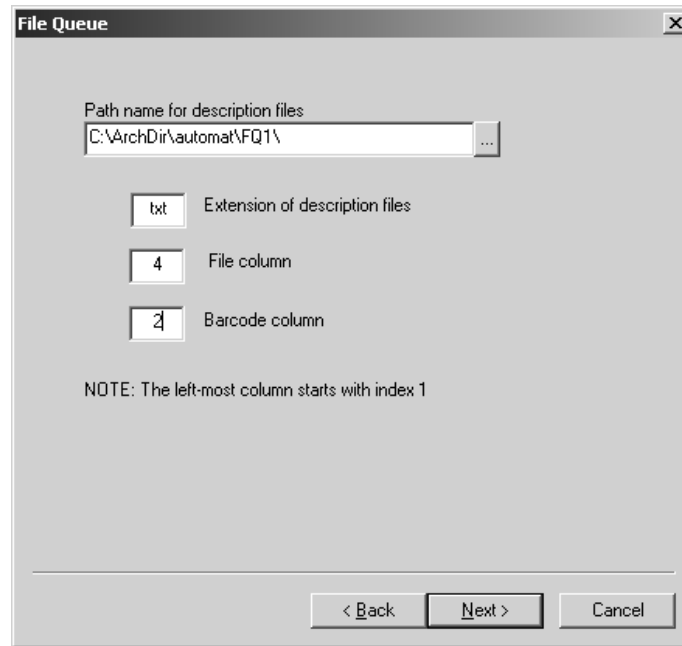


Figure 6. The File Queue panel

Enter the following settings:

- | | |
|--------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Path name for the description files | Path where the CommonStore Archiving Client expects the scanning application to create the description files for the documents handled by this queue. For example, if the scanning application is set up to create the description files for scanned invoices in the directory <code>c:\CSClient\Invoices</code> , you must enter this path. You can browse through the file system using the directory browser button. |
| Extension of description files | Enter the name of the extension of the description files. Thus, if the description file is named, for example, <code>batch1.txt</code> , enter <code>txt</code> in this field. |
| File column | Enter the number of the column which holds the file name in the description file. |
| Bar code column | Enter the number of the column which holds the bar code in the description file. Enter 0 if the bar code information is to be ignored. Take, for example, an entry in the description file with the following appearance:
<code>"Barcodes""1289003"d\CSClient\queues\invoices\doc1.tif"</code> |

It is obvious that (counting from left to right) the word *Barcodes* is in column 1, the current bar code value is in column 2, and the fully qualified name (path and file name) of the file is in column 3. Therefore, set the following values:

- File column** 3
- Bar-code column** 2

Content Manager Queue panel

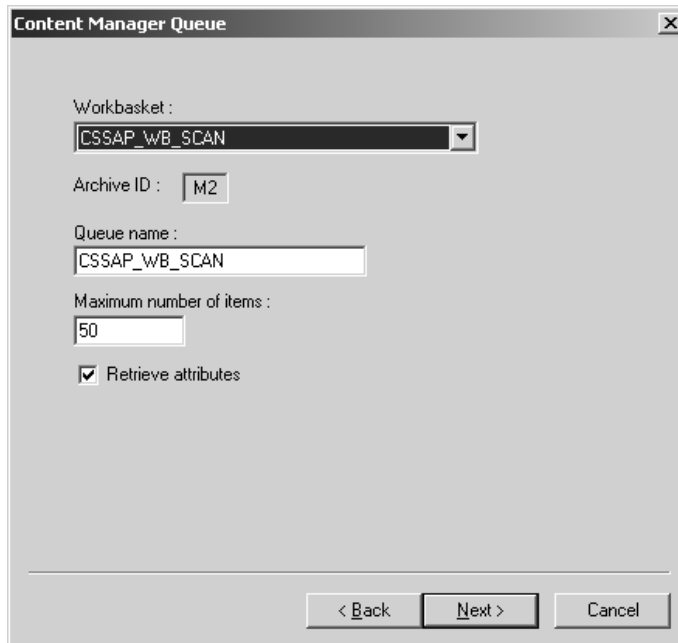


Figure 7. The Content Manager Queue panel

When using the Content Manager module (VIQueue), only documents from Content Manager workbaskets configured in the server configuration profile can be processed.

Enter the following settings:

Workbasket	The Workbasket box lists all Content Manager workbaskets, available by the contacted CommonStore Server. If there are no scan workbaskets customized in the CommonStore Server, a message is displayed. You have to change the CommonStore Server settings (default name: archint.ini).
Queue name	The name of the queue is received from the CommonStore Server automatically when choosing a workbasket from the list. The queue name can be changed manually if necessary. Changing the name does not affect the settings in the CommonStore Server.
Maximum number of items	The maximum number of document items retrieved by one call, when importing documents from a Content Manager queue.
Receive attributes	Select this check box to retrieve additional information (bar code and scan date) of the documents when importing them. Since this is a performance-relevant action, you are given the option of declining this offer if you do not need the information. This might be the case when you want to archive via OLE or perform early archiving w/o OLE.

Connection Properties panel

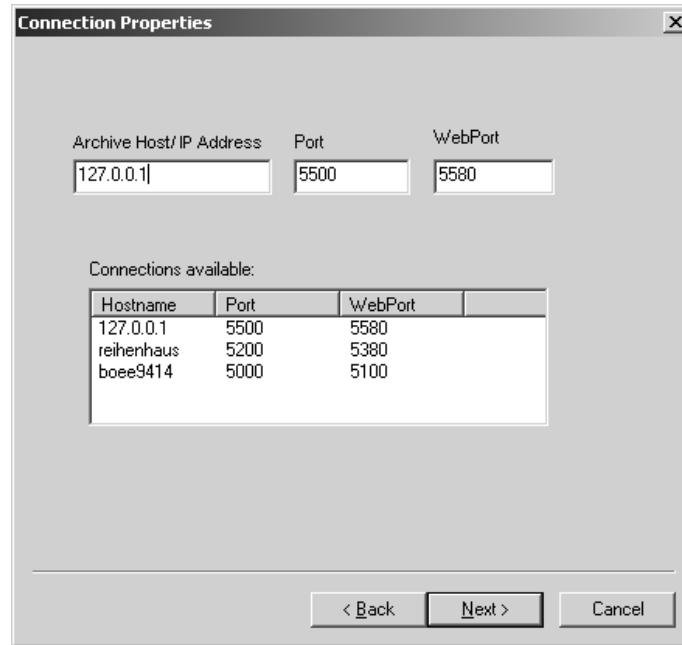


Figure 8. The Connection Properties panel

The Connection Properties panel allows you to select a server connection of your choice for the queue. Enter the following settings:

- Archive Host/IP Address** The name of the CommonStore Server that you want to connect to. You can enter the short name, the full name, or the IP address.
- Port** The number of the port that is used for client/server communication regarding archiving and retrieval jobs. This port uses a TCP/IP connection. The actual value depends on the individual setup. Ask the administrator of the CommonStore Server for the correct port number if you do not know it. It is a 4-digit number that is greater than 5000.
- WebPort** The number of the port that is used for client/server communication regarding the display of archived documents. Client and server communicate by using the Hypertext Transfer Protocol (HTTP), which is why the port is called the WebPort. The actual value depends on the individual setup. Ask the administrator of the CommonStore Server for the correct port number.

Important

- You cannot change the server connection of a Content Manager queue because Content Manager queues always use the *preferred server connection*.
- You cannot select a server connection for a queue while automatic processes are running.

End panel

Press the **Finish** button to make the newly allocated queue available in the CommonStore Archiving Client. If you decide not to create the queue during the previous steps, click the **Cancel** button and everything is discarded and the wizard will be closed.

Distributing the CommonStore Archiving Client to other PCs

If you do not want to run through the CommonStore Archiving Client installation and setup procedure for each PC on which it is to be installed, the following steps must be performed:

1. Perform the primary installation as described in “Installing the package” on page 15.
2. Run through the setup and enter your settings as described in “Setting up the CommonStore Archiving Client” on page 21.
3. Click **Setup → Save settings to file** to save the settings for the CSArch.ini file.
4. Copy the CommonStore Archiving Client installation directory to the other PCs.
5. Copy the CommonStore API-DLL (that is, CSClient.dll), which is located in the windows system directory, to the other PCs.
6. Copy the previously created file CSArch.ini into the installation directory on the other PCs.
7. Run the CommonStore Archiving Client on the other PCs for taking the settings from the CSArch.ini into the Windows registry.

Chapter 7. CommonStore Viewing Client

You must customize the components of the SAP Client separately. In “Getting started”, you find a list of the necessary steps for the CommonStore Viewing Client. Each step is described in detail in “Setting up the CommonStore Viewing Client”.

Getting started

You must perform the following steps before you can use the CommonStore Viewing Client:

1. Install the CommonStore Viewing Client. See “Installing the package” on page 16.
2. Perform the CommonStore Viewing Client setup. See “Setting up the CommonStore Viewing Client”.
3. Make sure that the value for the keyword ARCHWINS in the CommonStore Server profile (that is, archint.ini) is greater than zero.
4. For viewing documents via OLE, run through the customization procedure explained in Chapter 12, “Viewing documents via OLE” on page 53.

Setting up the CommonStore Viewing Client

Every time you run the CommonStore Viewing Client, the setup dialog is launched automatically. If this is the first time you run the CommonStore Viewing Client it is necessary to do some basic settings that might be changed later.

Note

It is recommended that you use the path of the installation directory as the work path and as the location of all CommonStore Viewing Client files (trace file, API-DLL trace file, log file) to have all of the files at the same location.

You must enter various settings on the panel that comes up. Clicking the **OK** button initiates a validity check. If the settings are correct, they are saved. Clicking the **Cancel** button leaves all settings unchanged and closes the panel.

Note

When you launch the setup panel, the connection to the specified CommonStore Server is checked and the connection status information on the setup panel (icon) and on the status bar is refreshed.

Server connection

This group holds all connection-related settings.

Archiving Host/IP Address	Name or IP address of the machine on which the CommonStore Server is running. The default value is 127.0.0.1.
----------------------------------	---------------------------------------------------------------------------------------------------------------

Port Port number specified in the server configuration file (default name: archint.ini) under the keyword ARCHWIN_PORT. The default value is 5500.

Test You can use the **Test** button to check the connection between the CommonStore Viewing Client and the CommonStore Server. If a connection can be established, you see a green circle right beside the button and in the status bar:



If a connection cannot be established, you see a red cross:



Important

You cannot select a server connection for the Viewing Client while automatic processes are running.

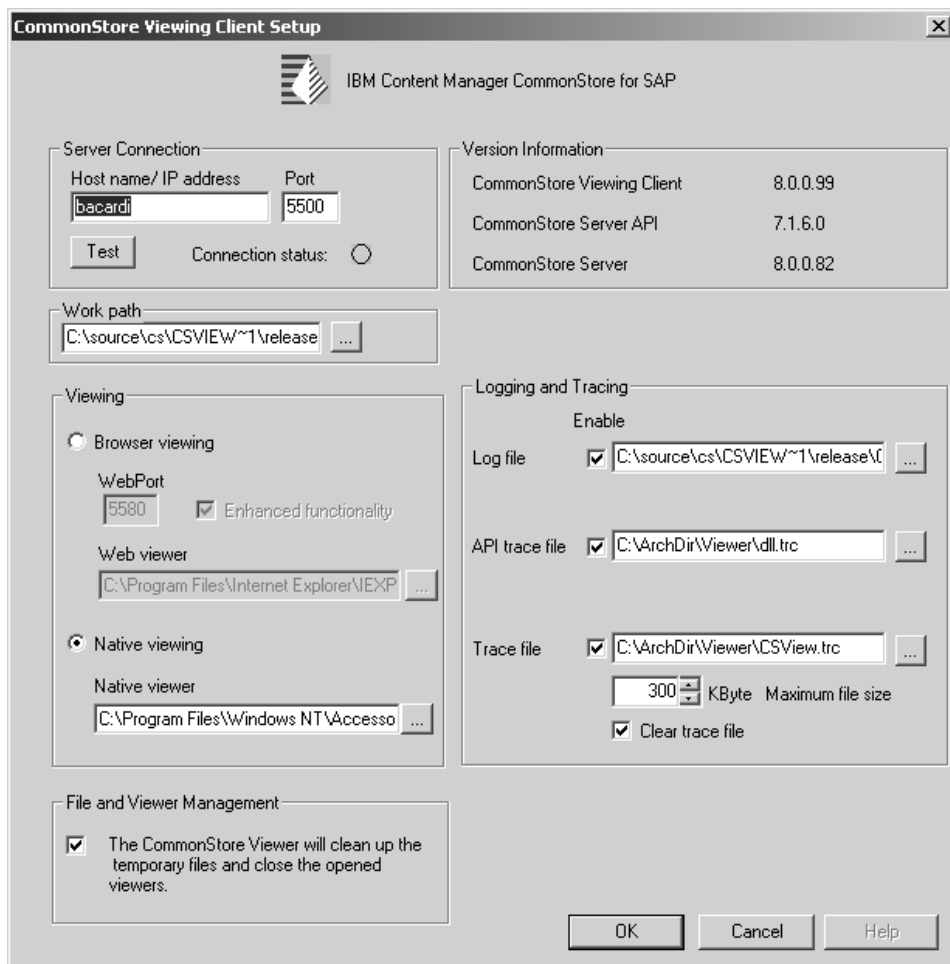


Figure 9. CommonStore Viewing Client Setup

Work path

The work path is set to the installation directory by default but can be changed, if necessary. The CommonStore Viewing Client uses this directory for processing various tasks. Temporary files will be allocated in this directory.

Enter the directory name either manually or use the directory browser button.

Viewing

Beginning with release 2.x of the CommonStore Viewing Client, it is possible to choose between browser viewing or a non-Web viewer for displaying documents via OLE.

Browser viewing Select this radio button if you want to use Browser viewing. This facility is enabled only if the CommonStore Server is reachable.

WebPort

The WebPort is filled in automatically if you click the **Test** button and the CommonStore Server can be reached assuming you are connecting to a version 7 CommonStore Server. Otherwise you have to enter the WebPort manually.

Enhanced functionality

If this check box is disabled just the document will be displayed. Otherwise, when displaying the requested document, buttons will be supplied for extra features like the Process note and the Mailing applet.

Web viewer

Enter the full qualified file name of the browser which should be used for viewing documents or browse the file system using the file browser button. By default the Netscape Communicator is used.

Native Viewing Select this button if you want to use as native viewing application.

Native viewer

Enter the full qualified file name of the application which should be used for viewing documents or browse the file system using the file browser button. By default the Wang Image Viewer is used.

File and viewer management

To display the requested documents, the CommonStore Viewing Client allocates temporary files in the file system and launches the viewer as configured.

Starting with SAP Release 4.5, SAP has changed the strategy of sending close calls to viewers. The viewer and file management has therefore been extended to handle this new behavior. If the check box is enabled, the CommonStore Viewing Client reacts to the received closing calls. Reacting to the closing calls refers to deleting temporary files from the file system and closing all the viewers launched by the CommonStore Viewing Client. If the check box is disabled, the CommonStore Viewing Client keeps the launched viewers open and does not delete the temporary files.

To make displaying less error-prone for SAP users, it is possible to display only one document at a time. This prevents the SAP user from entering a wrong

booking by looking at a wrong document. To enable this single display mode, you will need to customize the SAP OLE function as specified in "Customizing the ArchiveLink application for closing a viewer window" on page 62.

Version information

This group displays the versions of the CommonStore Viewing Client, the CommonStore Server API (CSClient.dll), and the CommonStore Server if a connection is established.

Logging and tracing

The CommonStore Viewing Client provides logging and tracing facilities. If logging is enabled, the CommonStore Viewing Client writes a protocol with information about the performed actions into a log file. In case of errors, additional information is added to the log file. For more detailed information, enable the tracing facility, which writes more detailed information into a trace file. Keep in mind, however, that tracing lowers the performance. Therefore, only use it when encountering errors.

If errors do occur, you can additionally enable the CommonStore Server API tracing facility to obtain special information about the communication between the CommonStore Viewing Client and the CommonStore Server.

In front of the text field for each file name there is a check box for enabling or disabling the according facility. If a facility is disabled, the affected fields are grayed out.

Log File	Enter the full path and the file name of the log file, for example: C:\CSClient\CSView.log
	You can also use the file browser right beside the text field.
API trace file	Enter the full path and the file name of the API-DLL trace file, for example : C:\CSClient\DLL.trc
	You can also use the file browser right beside the text field.
Client trace file	Enter the full path and the file name of the trace file, for example: C:\CSClient\CSView.trc
	You can also use the file browser right beside the text field.
Maximum file size	Enter a maximum size in kilobytes to limit the disk space that the trace file can occupy. If the specified size is exceeded, the trace file is truncated. The maximum size you can enter is 10240 KB.
Clear trace file	Enable this check box only if you want to clear the trace file each time the CommonStore Viewing Client is started. It is recommended that the trace file is not cleared (unchecked). This is because if ever highly intermittent errors occur, as much data as possible about all preceding actions is needed to be able to analyze the cause.

When you made the necessary changes, commit them by clicking the **OK** button or by pressing the **ENTER** key. Your entries are verified and the connection to the CommonStore Server is checked. If the verification runs without errors, the dialog box is closed. If errors occur, you receive an error message. You can discard your changes by clicking the **Cancel** button or by pressing the **ESC** key.

Distributing the CommonStore Viewing Client to other PCs

If you do not want to run through the CommonStore Viewing Client installation procedure for each PC on which it is to be installed, perform following steps:

1. Perform the primary installation as described in “Installing the package” on page 16.
2. Run through the setup and enter your settings as described in “Setting up the CommonStore Viewing Client” on page 33.
3. Propagate (copy) the installation directory of the CommonStore Viewing Client to the other PC.
4. Propagate the CommonStore DLL (that is, CSClient.dll), which is located in the Windows directory, to the other PC.
5. Propagate the client configuration profile to the other PC. This profile must be named CSClient.ini and must reside in the Windows directory for it to be taken into account by the CommonStore Viewing Client.
6. The CommonStore Viewing Client must be started at least once on the other PC to register itself in the Windows registry.

Chapter 8. CommonStore API-DLL

The CommonStore API-DLL is an intermediate layer located between applications on end-user workstations and the CommonStore Server. It is used by the following programs:

- CommonStore Archiving Client
- CommonStore Viewing Client
- SAP ArchiveLink viewer

These applications use the CommonStore API-DLL to contact the CommonStore Server when archiving documents or requesting documents for viewing.

The CommonStore API-DLL is part of the CommonStore Viewing Client package as well as of the CommonStore Archiving Client package and is copied to the Windows system directory during the installation. The DLL needs the CommonStore Client configuration profile (that is, CSClient.ini) to run, but only the settings of the keywords in section [ARCHPRO_CONNECTIONPARAMETER]. The parameters for establishing the connection to the CommonStore Server are:

Server Name or TCP/IP address of the machine on which the CommonStore Server is running.

Port Port number specified in the server configuration profile (that is, archint.ini) under the keyword ARCHWIN_PORT.

The CommonStore API-DLL supports a separate detailed tracing of all CommonStore API-DLL function calls. DLL tracing should be activated only in case of error situations. API-DLL tracing is controlled by the following keywords:

DLLTracefile

Fully qualified file name (path and file name) of the API-DLL trace file, for example:

c:\CSClient\CSD11.trc

DLLTracelevel

Enter 0 to disable API-DLL tracing or 1 to enable tracing.

DLLTraceMax

Specifies the maximal size of the API-DLL trace file in KB. The default value is 1024, meaning 1 MB.

Viewing documents with the SAP ArchiveLink viewer

For the exclusive use of the ArchiveLink viewer for displaying documents, no parameters in the client configuration profile CSClient.ini other than those specified above are required.

To enable viewing via the ArchiveLink viewer, you must ensure that the *ArchiveLink functionality*, too, is installed on the workstation when installing the SAP GUI. For this reason, the clicker for ArchiveLink must be enabled in the SAP GUI installation procedure.

After finishing the installation of the SAP GUI, configure the installation by running the program setup_al.exe. You will be asked for an archive ID and the DLL of the archive vendor (that is, CSClient.dll). For releases 3.x of setup_al.exe,

you must explicitly specify each archive ID contacted for viewing. Starting with release 4.0, you can keep default as the archive name to contact CSCClient.dll for all viewing calls.

The setup_al.exe program configures the following files:

- archlink.ini
- alviewer.ini

After the setup procedure, archlink.ini and alviewer.ini contain the entries specified in Figure 10 and Figure 11 on page 41.

After the setup, make sure that the sections displayed in **boldface** in Figure 10 and Figure 11 on page 41 fit your environment.

```
[ArchiveLink]
Archives=A1,AR,D1,CN,
Path=D:\programs\sapgui\archlink\
DisplayTypes=FAX,OTF,ALF
[Logging]
LogFile=ALINKLOG.TXT
MaxFileSize=100000
LogLevel=500
[Archive-A1]
ArchiveLinkDLL=CSCClient.dll
[Archive-AR]
ArchiveLinkDLL=CSCClient.dll
[Archive-D1]
ArchiveLinkDLL=CSCClient.dll
[Archive-CN]
ArchiveLinkDLL=CSCClient.dll
[Scan]
DdeService=viscan
DdeTopic=viscan
[FAX]
DdeService=SAPArchiveLink
DdeTopic=*
Path=ALVIEWER.EXE
[OTF]
DdeService=SAPArchiveLink
DdeTopic=*
Path=ALVIEWER.EXE
[ALF]
DdeService=SAPArchiveLink
DdeTopic=*
Path=ALVIEWER.EXE
```

Figure 10. Sample excerpt from archlink.ini

```

[Alviewer]
Path=D:\programs\sapgui\archlink
Archives=A1,AR,D1,CN,
x=451
y=73
dx=769
dy=537
[Logging]
LogFile=ALINKLOG.TXT
MaxFileSize=100000
LogLevel=500
[ImageDisplay]
MinResolution=60
BackgroundColor=192,192,192
ScaleAlwaysToWindow=0
ScaleToGrey=0
LeftMouseButton=1
[International]
D=DEU
E=ENG
X=DEU
[InitialLanguage]
LanguageMarker=D
[IxMemo]
BackgroundColor=255,255,64
Signature=\n © %D.%M.%Y, %h:%02m %[SAPUSER] \n
[Cache]
MaxFiles=50
[Archive-A1]
ArchiveLinkDLL=CSCLIENT.DLL
[Archive-CN]
ArchiveLinkDLL=CSCLIENT.DLL
[Archive-AR]
ArchiveLinkDLL=CSCLIENT.DLL
[Archive-D1]
ArchiveLinkDLL=CSCLIENT.DLL

```

Figure 11. Sample excerpt from *alviewer.ini*

For further information, refer to the *SAP WF ArchiveLink* manual on the SAP Documentation Print Files CD-ROM and the description of the ALSETUP program on the SAP Presentation CD-ROM.

Note

The features described in “Viewing documents from multiple SAP systems” and “Caching at the client side” on page 42 are optional. Do not add the entries specified in these two sections if you do not need the features, as this may have an impact on the performance.

Viewing documents from multiple SAP systems

When using the settings in the client configuration profile *CSClient.ini*, only that instance of CommonStore Server identified by the settings for ‘Server’ and ‘Port’ will be contacted. As a consequence, only the documents of that R/3 System can be displayed which is served by the specified CommonStore Server.

To allow viewing of documents from multiple R/3 systems, the *CSClient.dll* needs to connect to multiple CommonStore Servers, since one CommonStore Server connects to only one SAP system. This means that the API-DLL will contact in a round-robin procedure a specified set of CommonStore Servers for handling a certain request. In general, the CommonStore Server which could successfully

handle a request becomes the so-called active CommonStore Server. The next request is always sent first to the active CommonStore Server. If it is not possible to retrieve the requested document from the active CommonStore Server instance, the next CommonStore Server will be contacted until this request is handled successfully or all of the listed CommonStore Servers have been contacted. The CommonStore Server which handled the request successfully will again be set active and the next request will be sent to this CommonStore Server instance. If the request finishes successfully, the document will be displayed. An error message will be sent to the SAP system only when all listed CommonStore Servers have returned an error.

For all CommonStore Servers which need to be contacted from the current workstation, add entries to the client configuration profile CSClient.ini, for example:

Server:

Name or IP address of the first instance of the CommonStore Server

Port: Port of the first instance of the CommonStore Server

Server_2:

Name or IP address of the second instance of the CommonStore Server

Port_2:

Port of the second instance of the CommonStore Server

The dynamic link library CSClient.dll reads the settings starting with the settings for 'Server' and 'Port', continuing with 'Server_2' and 'Port_2', and so on. The first entry will be used when the first call arrives.

Notes

- The order in which these entries are specified is not important, for example: You can specify 'Server_2' and 'Port_2', 'Server' and 'Port', and then 'Server_3' and 'Port_3'.
- The entries will be read until a gap is encountered. Thus, if you have specified 'Server' and 'Port', 'Server_2' and 'Port_2', and then 'Server_4' and 'Port_4', the API-DLL takes only the first two entries into account.

When multiple instances of the CommonStore Server are customized in the client configuration profile CSClient.ini, it is recommended that you deactivate the message box of the API-DLL, which pops up in case of a connection error to a CommonStore Server. This is achieved by setting the parameter `Interactive=0` (see Figure 12 on page 43). The default is `Interactive=1`.

Caching at the client side

The CommonStore API-DLL supports the caching of retrieved documents at the end-user workstation. When caching is enabled, complete documents and the query information are stored in the local cache.

Caching is enabled by the keyword *CachePath* specifying the directory for the cache (when left empty, caching is disabled). This directory must exist, or else caching is disabled. *CachePath* should specify a separate directory, since all files in the cache are deleted when the *CacheMax* limit is exceeded. *CacheMax* specifies the maximal

size of the cache in KB. When the total size of all files in the cache exceeds this limit, all files are deleted before the next file is stored in the cache.

CachePath

Specifies the directory for the cache. The directory must exist.

CacheMax

Specifies the maximum size of the cache in KB. The default value is 10 240, meaning 10 MB.

The following excerpt from the client configuration profile CSClient.ini shows example settings for the API-DLL topics discussed in this chapter.

```
[ARCHPRO_CONNECTIONPARAMETER]
Server          =      w3362117
Port            =      5500
Server_2       =      w3362117
Port_2         =      5502
Server_3       =      archifix
Port_3         =      8017

D11Tracefile=E:\CSClient\d11.trc
D11TraceLevel=1
D11TraceMax=1024

Interactive=0

CachePath=E:\CSClient\cache
CacheMax=10240
```

Figure 12. Sample excerpt from the client configuration profile (CSClient.ini)

Important

If you view archived documents in a Web browser, caching at the client side does not work because the browser retrieves the data independently of the DLL cache.

Part 4. SAP customization guide

Chapter 9. Early archiving via OLE

Early archiving via OLE is an SAP archiving scenario for incoming documents including the SAP Business Workflow. To get this scenario working, you need to proceed as follows:

1. Set up the SAP workflow parameters and document types. See also Chapter 14, "Collection of SAP customizing steps" on page 57.
2. Register the CommonStore Archiving Client application in the SAP system. See also "Registering an OLE application in SAP" on page 58.
3. In SAP Release 3 you need to load the TypeLib information for the CommonStore Archiving Client. See also "Loading the TypeLib information" on page 58.
4. Create an ArchiveLink application for the CommonStore Archiving Client. See also "Creating an ArchiveLink application" on page 58.
5. Customize the ArchiveLink application for archiving via the CommonStore Archiving Client. See also "Customizing the ArchiveLink application for the CommonStore Archiving Client" on page 58.
6. Create an ArchiveLink protocol. See also "Creating an ArchiveLink protocol" on page 59.
7. Customize the ArchiveLink protocol for archiving via the CommonStore Archiving Client. See also "Customizing the ArchiveLink protocol for archiving via the CommonStore Archiving Client" on page 60.
8. Create an entry in the link table for the document type used for early archiving. See also "Creating an entry in the link table for the document type used for early archiving" on page 59.

Chapter 10. Early archiving without OLE

Since SAP Release 4.6C the SAP Business Workflow can be triggered via the ArchiveLink interface. CommonStore supports this new archiving scenario for incoming documents beginning with version 7. To get this scenario working, proceed as follows:

1. Set up the SAP workflow parameters and document types. See also Chapter 14, "Collection of SAP customizing steps" on page 57.
2. Register the CommonStore Archiving Client application in the SAP system. See also "Registering an OLE application in SAP" on page 58.
3. In SAP Release 3 you need to load the TypeLib information for the CommonStore Archiving Client. See also "Loading the TypeLib information" on page 58.
4. Create an entry in the link table for the document type used for early archiving. See also "Creating an entry in the link table for the document type used for early archiving" on page 59.

Chapter 11. Late archiving with bar code

Late archiving with bar code is one of the most used scenarios for archiving incoming documents. At SAP side you have to do different settings before using it:

1. Customize bar code storing for the object type you want to use, for example BKPF by using transaction **OAC5**. For detailed information on setting up the object types see the SAP documentation.
2. The SAP bar code types need to be checked and customized for your purposes. Use transaction **OAD4** for checking the settings. For detailed information check the SAP documentation.
3. The SAP application you want to integrate must be enabled for late archiving with bar code.

Look up more detailed information on SAP customizing for late archiving with bar code in the SAP documentation.

Chapter 12. Viewing documents via OLE

For viewing documents via OLE using the CommonStore Viewing Client you have to do some SAP OLE customizing similar to the CommonStore Archiving Client. Proceed as follows:

1. Register the CommonStore Viewing Client in SAP. See also "Registering an OLE application in SAP" on page 58.
2. In SAP Release 3 you need to load the TypeLib information for the CommonStore Viewing Client. See also "Loading the TypeLib information" on page 58.
3. Create an ArchiveLink application for the CommonStore Viewing Client. See also "Creating an ArchiveLink application" on page 58.
4. Customize the ArchiveLink application for viewing via the CommonStore Viewing Client. See also "Customizing the ArchiveLink application for viewing via the CommonStore Viewing Client" on page 61.
5. Create an ArchiveLink protocol. See also "Creating an ArchiveLink protocol" on page 59.
6. Customize the ArchiveLink protocol for viewing via the CommonStore Viewing Client. See also "Customizing the Archlink protocol for viewing documents" on page 62.

Chapter 13. Viewing print lists via SAP ArchiveLink

For viewing print lists you may use the SAP GUI or the SAP ArchiveLink viewer. To get this working, you need to proceed as follows:

1. Create an ArchiveLink protocol. See also “Creating an ArchiveLink protocol” on page 59.
2. Customize the ArchiveLink protocol for viewing print lists either via SAP GUI or via the SAP ArchiveLink viewer. See also “Customizing the Archlink protocol for viewing documents” on page 62.
3. Enable extended ALF viewing for viewing print lists with hyperlinks. See also “Enabling extended ALF viewing” on page 62.

Chapter 14. Collection of SAP customizing steps

The SAP Business Workflow is part of SAP ArchiveLink within the BC module. To get the workflow working, you need to customize SAP ArchiveLink, which you can do by using the Implementation Guide for R/3 Customizing (IMG).

Note

The IMG can be carried out by transaction code SPRO in all SAP releases up to 4.6.

The workflow settings can be done within the IMG path **R3 → Basis Components → Basis Services → SAP ArchiveLink**.

1. Customize the workflow basic settings. The implementation can differ between SAP releases. The workflow setup can be checked by transaction **SWU3**. Each check item has to be signed by a green hook, otherwise the settings have to be corrected. See the SAP documentation for detailed information on this.
2. Customize the document types you want to use for your scenario. Document types are used for linking them with several document classes, for example, **FIINVOICE** to **FAX**, which is needed for controlling storing and display documents. Documents can be maintained in transaction **OAC2**.
3. Customize workflow document types to assign workflow tasks to the document types you are using. This can be done in transaction **SOA0**. Either the standard tasks or self-created workflow templates can be used. The **FIINVOICE** document type has the following default properties:

Process type	NCI_INPUT
Object type	BKPF
Object type	CREATE
Task	TS7869

For more detailed information, see the SAP documentation.

4. Create fast entries for the workflow document types. Use transaction code **OAD5**. Depending on the SAP release level either a transaction opens or up from release 4.5 a wizard opens.

Note

In later SAP releases the “fast entry” is called “presetting”. Both terms have the same meaning.

For more detailed information about setting up the SAP Business Workflow see the SAP documentation.

Registering an OLE application in SAP

To register an application in the SAP system, proceed as follows:

1. Use transaction code **SOLE**. A panel appears.
2. Press the **Change** button.
3. Press the **New entries** button.
4. Enter the following settings:

CommonStore Archiving Client

OLE application	CCLIENT.DOCUMENT
CLSID	{C8452EF3-19FE-11D1-A16E-0004AC62FCBA}
Type Info key	NO_TYPELIB

CommonStore Viewing Client

OLE application	OLEDISPA.DOCUMENT
CLSID	{45526A21-AA41-11CF-B90A-0004ACED415F}
Type Info key	NO_TYPELIB

5. **Save** the settings. This information enables the SAP GUI to detect the executable of the CommonStore Archiving Client or the CommonStore Viewing Client via the Windows registry.

Loading the TypeLib information

To load the TypeLib information for either the CommonStore Archiving Client or the CommonStore Viewing Client, proceed as follows:

1. Use transaction code **SOLI**. A panel appears.
2. Highlight the application you have customized previously and press the **Load Type Info** button. This setting will be used for the communication between the SAP GUI and the CommonStore Clients.

Creating an ArchiveLink application

If it is necessary to create an ArchiveLink application, proceed as follows:

1. Press the **New application** button. Enter a logical name for the application (for example CSARCH for the CommonStore Archiving Client) and press the **Continue** button.
2. Click the **Save** button.

Customizing the ArchiveLink application for the CommonStore Archiving Client

To customize the ArchiveLink application for archiving via the CommonStore Archiving Client, proceed as follows:

1. Use transaction code **OAA4**. A panel appears.
2. Double-click the ArchiveLink application you want to customize, for example CSARCH (for information on how to create a new ArchiveLink application see "Creating an ArchiveLink application"). A list of ArchiveLink functions will be displayed.
3. Highlight **Archive from frontend** (the fourth entry in the list).

4. Depending on your SAP release, click the **OLE** button or double-click the selected entry. A panel for setting up the OLE communication appears.
5. Enter settings as shown below:

Note

It is mandatory that the entries be specified in the following order.

Application	CCLIENT.DOCUMENT
Select radio button	Command
M	SetAID @AID
M	doQueueArchive =@DID
G	@EID =EID

Note

Make sure that the correct radio buttons are selected for the specified command. When the radio button **M** is selected, the setting specified in the **Command** column will be treated as a *method*. When the radio button **S** is selected, the setting in the **Command** column will be used to set an attribute in the CommonStore Archiving Client. When the radio button **G** is selected, the setting in the **Command** column will be used to *get the value* of an attribute from the CommonStore Archiving Client.

Creating an ArchiveLink protocol

If it is necessary to create an ArchiveLink protocol, proceed as follows:

1. Use transaction code OAA3.
2. Press the **New protocol** button. A panel appears.
3. Enter the following settings:

Protocol	For example: CSPRT (logical name)
Version	Choose the highest version, depending on the release of your R/3 System. Note: In general, you should use the version corresponding to your SAP system, for example 0031 for SAP Release 3.1. <i>Never</i> use 0040 because this SAP protocol version has a bug.
Description	Enter information on this protocol.

4. Click the **Save** icon.

Creating an entry in the link table for the document type used for early archiving

Depending on the entries in the link table, SAP allocates archives to documents. To create an entry in the link table for the document type used for early archiving, proceed as follows:

1. Use transaction code **OAC3**. A panel appears.
2. Create an entry for the document type for which you want to perform early archiving. For example: For incoming invoices without verification, you need an entry with the following settings:

Obj.type	BKPF
Doc.type	FIINVOICE

Check whether there is already an entry in your link table with these settings. If there is such an entry, you may update only the **Arch.ID** for this entry. To create a new entry, proceed as follows:

- a. Press the **Change** button. The panel turns into change mode.
- b. Press the **New Entries** button.
- c. Enter the following settings into the appearing form:

Object type	Object type which the document type is from (for example BKPF)
Document type	Document type (for example FIINVOICE)
Status	X
Opt. archive ID	Archive ID of the archive the documents should be put in (for example A1)
Link	Table for storing link data of archived documents (for example TOA01)
Retention per.	(leave blank)

Note

In newer SAP releases the fields can have different names, for example Opt.archive ID is called content server in release 4.6.

- d. Click the **Save** button.

Note

Check the entry for the object type you have customized, for example BKPF. (For detailed information see also *Checking the entry in the TOAOM table in the IBM Content Manager CommonStore for SAP: Server Installation and User's Guide*.)

Customizing the ArchiveLink protocol for archiving via the CommonStore Archiving Client

To customize the ArchiveLink protocol for archiving via the CommonStore Archiving Client, proceed as follows:

1. Use transaction code **OAA3** . A panel appears.
2. Double-click the protocol to be customized, for example **CSPRT** (for information on how to create a new ArchiveLink protocol, see "Creating an ArchiveLink protocol" on page 59). A list of offered functions will be displayed.
3. Double-click **Archive from frontend** (the fourth entry).
4. Select the radio button for the document class FAX.
5. Press the **Edit** button. A panel appears:
6. Enter the following settings:

Comm. method	OPEN
Application	Enter the application you have customized previously, for example CSARCH

7. Press the **Continue** button and the panel disappears.
8. Use the **Save** icon to save the protocol settings.

Note

Only after setting **Comm. method** equal to OPEN will the edit box appear, in which you can specify the application name.

Customizing the ArchiveLink application for viewing via the CommonStore Viewing Client

To customize the ArchiveLink application for viewing via the CommonStore Viewing Client, proceed as follows:

1. Use transaction code **OAA4**. A panel appears.
2. Double-click the ArchiveLink application you want to customize, for example CSVIEW or CSARCH (for information on how to create a new ArchiveLink application see “Creating an ArchiveLink application” on page 58). A list of ArchiveLink functions will be displayed.
3. Highlight the **Display object** or the **Display archived object** entry (the first entry in the list).
4. Depending on your SAP release click either the **OLE** button or double-click the selected entry. A panel for setting up the OLE communication appears.
5. Enter the settings as shown. It is mandatory that you specify the entries in the following order:

Application	OLEDISPA.DOCUMENT	
Select radio button	Command	
M	SetUID @UID	(see Note below)
M	SetAID @AID	
M	doView @DID	
G	@EID =EID	

Notes

- The OLE method SetUID is necessary only if you want to save the user ID when processing notes via CommonStore.
- Make sure that the correct radio buttons are selected for the specified command. When the radio button **M** is selected, the setting specified in the **Command column** will be treated as a *method*. When the radio button **S** is selected, the setting in the **Command column** will be used to *set an attribute* in the CommonStore Archiving Client. When the radio button **G** is selected, the setting in the **Command column** is used to *get the value* of an attribute from the CommonStore Archiving Client.

Customizing the Archlink protocol for viewing documents

To customize the ArchiveLink protocol for viewing via the CommonStore Viewing Client, proceed as follows:

1. Use transaction code **OAA3**. A panel appears.
2. Double-click the protocol to be customized, for example **CSPRT** (for information on how to create a new ArchiveLink protocol, see “Creating an ArchiveLink protocol” on page 59). A list of offered functions is displayed.
3. Depending on the SAP release, click the **Display object** or the **Display archived object** entry (first entry in the list).
4. Select the document class you want to customize, for example ALF for print lists, FAX for incoming documents.
5. Click the **Edit** button.
6. Enter the following settings:

Comm. method	Either OPEN (for FAX), R/3 (for ALF), or standard communication (for FAX and ALF)
Application	Enter the application you have customized previously, for example CSVIEW (only if Comm.method OPEN was selected)

Note

- For viewing print lists within the SAP GUI choose communication method R/3. Starting with SAP Release 4.5/4.6 print lists with hyperlinks can also be viewed in the SAP GUI. Selecting communication method Standard communication, the SAP ArchiveLink viewer will be used for viewing. The SAP ArchiveLink viewer is only delivered up to SAP Release 4.5.
- For viewing documents (except print lists) via OLE you have to choose communication method OPEN.

Enabling extended ALF viewing

To enable extended ALF viewing, proceed as follows:

1. Use transaction code **RZ10** and **RZ11**.
2. Choose the profile of the SAP R/3 System and add the parameter as follows:
rspo/archive_format=2

Customizing the ArchiveLink application for closing a viewer window

The ArchiveLink interface can call OLE functions in the ArchiveLink application for closing the viewer window when the transaction viewing was started from is left. This mechanism prevents wasting resources on the client workstation. If the CommonStore Viewing Client gets a **doCloseWindow** call, it closes the current viewing application instance. To set up OLE communication in the SAP system, follow these steps:

1. Use transaction code **OAA4**. A panel appears.
2. Double-click the ArchiveLink application you customized for displaying a document, for example **CSVIEW**. A list of ArchiveLink functions will be displayed.
3. Highlight the function **Close window**.

4. Depending on your SAP release, click either the **OLE** button or double-click the selected entry. A panel for setting up the OLE communication appears.
5. Enter the following settings:

Application	OLEDISPA.DOCUMENT
Select radio button	Command
M	doCloseWindow

Part 5. User's guide

Chapter 15. Working with the CommonStore Archiving Client

After having installed and configured the CommonStore Archiving Client, created the CommonStore queues, and saved the working environment to a CommonStore Archiving Client file with the extension .csw, you can restore this session at any time simply by opening the file in the CommonStore Archiving Client.

CommonStore Archiving Client GUI

The CommonStore Archiving Client's GUI provides the following operating facilities:

- The *menu bar* (for example **File** or **Edit**). By clicking on one menu entry, the submenus of this entry will be displayed.
- The *tool bar* is a list of graphic symbols, each of which stands for a shortcut to a certain menu entry.
- *Context menus*, which will be displayed when clicking an item with the right mouse button.
- Two *frames* displaying the queues and documents which you are working on.

After having imported documents (see "Importing documents") into the CommonStore Archiving Client, the two frames of the GUI will be populated as shown in Figure 1 on page 14.

The *left frame* is mainly used for displaying the structure of the CommonStore queues. The hierarchy of the structure comprises the following levels:

- The topmost level is the *queue level*.
- The next-lower level is the *document level*.

You can make the next-lower level visible by clicking the + sign. This is referred to as *expansion*.

Several documents may be available in a queue. By expanding a queue entry, all the documents contained in that queue will be listed.

The *right frame* will be used mainly for selecting the documents to be archived or for displaying the contents of a document.

In the status line, information on the status of an action will be displayed. It is very useful in error situations. The box in the middle first displays the number of documents currently in the active queue and then the number of the selected documents in the active queue. The right box in the status line displays the connection status with the CommonStore Server by text and icons (see also Figure 1 on page 14).

You can switch between the left and the right frame by using the **TAB** key.

Importing documents

To fill the CommonStore queue with previously-scanned documents, you first have to select the queue that you want to import in the left panel. You can use the following methods of importing:

- Select **Import** from the context menu appearing when clicking the right mouse button on the queue.
- Select the menu path **Queue → Import** from the application menu.
- Press **Alt+F1**.

Due to the previously defined settings, when creating the CommonStore queue, the CommonStore Archiving Client finds the scanned documents in the specified location and imports them. The documents will be listed from top to bottom in alphabetical order. Each document is identified by the name, the bar code (if applicable), and the creation date.

After having imported documents into a queue the list of documents can be expanded by clicking the plus sign next to the queue name.

You can observe the importing activity in the right frame, where an entry will be added for each imported document.

Stopping importing

An import process can be canceled by one of the following actions:

- Double-clicking the queue.
- Selecting **Stop importing** from the context menu that opens when you right-click the queue name.
- Clicking **Queue → Stop importing** on the main menu.
- Pressing **Alt+F2**.

Viewing documents

A highlighted document in the right frame can be viewed by double-clicking this entry. You can also select **View document** from the context menu or press **Alt+V**.

Viewing documents is done by a Microsoft Internet Explorer ActiveX Control to display all document types in one viewer assuming you have installed the correct plug-ins. If you have installed, for example, the Adobe Acrobat Reader, the corresponding Microsoft Internet Explorer plug-in is installed as well. For viewing TIFF documents you can use, for example, the AlternaTIFF plug-in.

Note

If you are using Microsoft Windows 2000, a Wang Image plug-in for viewing TIFF documents is part of the operating system.

Archiving documents

You can archive individual documents or an entire queue. In addition, you may archive documents automatically, that is, unattended, at regular intervals.

You can observe the archiving activity in the right frame, where the document stack diminishes with each successfully archived document.

Archiving documents manually

In the right frame, select the document to be archived by clicking it. A colored selection bar will give you visual proof of your selection. If you want to select

more than one document, keep the **Shift** or **Ctrl** key pressed while clicking additional documents. Press **Ctrl+A** to select all documents in the selected queue. Depending on which archiving scenario you are using, select **Late archiving** or **Early archiving** from the context menu or from the **Document** menu. From the submenus, select either **Archive selected item(s)** for archiving the selected items only or **Archive all items** for archiving all items in the queue.

Archiving all items in a queue

Depending on which archiving scenario you are using, start archiving by one of the following actions.

Late archiving:

- Selecting **Late archiving** from the context menu of the left frame.
- Clicking **Queue** → **Late archiving**.
- Pressing **Alt+F6**.

Early archiving:

1. Selecting **Early archiving** from the context menu of the left frame.
2. Clicking **Queue** → **Early archiving**
3. Pressing **Alt+F5**.

Note

Early archiving is enabled only if the connected CommonStore Server is version 7 or later and if the document type for the dedicated queue is customized (see also “Creating queues” on page 25).

Stopping archiving

An archiving session can be canceled by selecting **Stop archiving** → **Queue** → **Stop archiving** from the context menu or by pressing **Alt+F7**.

Deleting documents

Deleting documents works only if neither importing nor archiving is in progress for the selected item.

Select the items to be deleted. Choose **Delete document** from the context menu or menu path **Document** → **Delete document**. Alternatively, hit the **Delete** key or press **Alt+D**.

You will be asked whether the document is supposed to be deleted only from the CommonStore Archiving Client’s GUI only or if the electronic document should be deleted from the file system as well.

Note

For security reasons, it is not possible to delete electronic documents residing in a Content Manager workbasket directly from the CommonStore Archiving Client.

Resetting the error flag

If an error has occurred while archiving, an error flag for this queue will be set and you will be made aware of it by a warning when trying to start a new archiving process. If you decide to continue, the error flag will be reset based on the assumption that the problem may have been fixed in the meantime.

It is also possible to reset the error flag by highlighting a queue in the left frame and choosing **Reset error flag** from the context menu.

Switching server connections

The CommonStore Archiving Client allows you to choose between several CommonStore Server connections. This gives you the opportunity to redirect the archiving workload in your queues, which might be useful if, for example, the server that you usually connect to is very busy.

When you start the CommonStore Archiving Client, it connects to a default server. This connection is called the *preferred server connection*. You enter the details of the preferred connection when you first start the CommonStore Archiving Client, but you can also change it later.

Important

- Content Manager queues can only use the preferred server connection. To create multiple Content Manager queues connecting to different servers, you must therefore specify the preferred server connection before creating the queue. See “Creating queues” on page 25.
- You cannot change the server connection of any queue while automatic processes are running.

If you decide to use more CommonStore Servers for your archiving jobs, you can add the parameters for additional connections to existing queues. You do this by changing the connection settings on the property sheet of a queue. The archiving client then switches to the new connection.

Each connection that you use or did use is listed in the Connections Information window, which gives you the details of the active connection and the inactive ones. You open this window by clicking **Queue → Connections Info** on the main menu of the archiving client. You can view and refresh this information at any time.

You need not worry about older files containing queue connection details, that is, .csw files created with older versions of the CommonStore Archiving Client. When the archiving client comes across such files, it automatically migrates them to the new format so that the new functionality becomes available for the existing queues. You are prompted to save the files in the new format. If you decide not to do this, you can still save the migrated versions under a different name by clicking **File → Save As** on the main menu.

Changing queue connections

This section explains how to change the connection parameters and thus change the server connection of an existing queue. For information on how to set up a queue connection when creating a queue, see “Creating queues” on page 25 and “Connection Properties panel” on page 30 in particular. Follow these steps:

1. After starting the CommonStore Archiving Client, create a queue, or open an existing queue.
2. Right-click the name of the queue in the left pane.
3. Select **Properties** from the context menu. The property sheet of the queue opens.
4. Click the Connections tab. Change the values in the following fields to the proper values for the new connection.

Archive Host/IP Address

The name of the CommonStore Server that you want to connect to. You can enter the short name, the full name, or the IP address.

Port

The number of the port that is used for client/server communication regarding archiving and retrieval jobs. This port uses a TCP/IP connection. The actual value depends on the individual setup. Ask the administrator of the CommonStore Server for the correct port number. It is a 4-digit number that is greater than 5000.

WebPort

The number of the port that is used for client/server communication regarding the display of archived documents. Client and server communicate by using the Hypertext Transfer Protocol (HTTP), which is why the port is called the WebPort. The actual value depends on the individual setup. Ask the administrator of the CommonStore Server for the correct port number.

5. Click **Test** to check whether your new connection works. The archiving client indicates a working connection by a green light. If the connection does not work, you see a red cross.
6. Click **OK**. The CommonStore Archiving Client now uses the connection whose parameters you just entered.

Important

- You cannot change the server connection of a Content Manager queue because Content Manager queues always use the *preferred server connection*.
- You cannot change the server connection of any queue while automatic processes are running.

Changing the preferred server connection

The preferred server connection is the connection that the CommonStore Archiving Client establishes first when you start it. The procedure of changing this connection is much similar to that of switching a connection. Follow these steps:

1. After starting the CommonStore Archiving Client, click **Setup** → **Run setup**.
2. Enter the proper values of a server connection in the following fields:
 - **Archive Host/IP Address**
 - **Port**

The meaning of these fields is described in step 4. You need not enter a port number in the **WebPort** field because this is done automatically when you proceed with step 3.

3. Click **Test** to check whether the new connection works. The archiving client indicates a working connection by a green light. If the connection does not work, you see a red cross.

4. Click **OK**. The CommonStore Archiving Client switches to the new preferred server connection and saves its details. The server connections of existing queues are not affected by this change. When you close the archiving client and restart it, it establishes a connection based on the new parameters.

Important

You cannot change the preferred server connection while automatic processes are running.

Displaying the connection status

As indicated in the introductory section, you can display information about the various server connections that you use. Click **Queue → Connections Info**. This brings up the window shown in Figure 13.

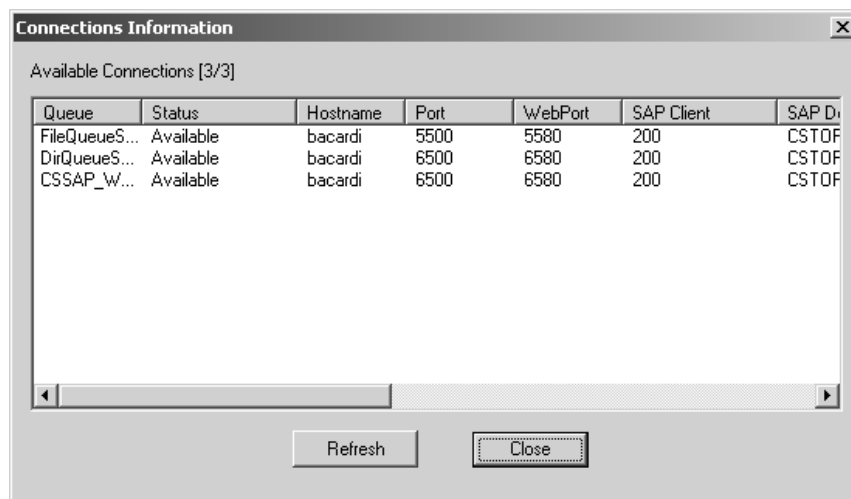


Figure 13. The Connections Information window

The Connections Information window displays the details of all current server connections. This includes information about the queues that the connections are related to, the port numbers, whether or not the connection is currently used, available or not available, and the SAP R/3 parameters.

If the connection status changes while the window is open, you can click the **Refresh** button to reflect these changes on the display. Click **Close** to close the Connections Information window.

Important

- To display the connection status, you must select a queue in the left pane of the window.
- You cannot display the connection status while automatic processes are running.

Panel functions

This section provides an overview of the actions that you can perform by using the main menu.

Menu

The menu consists of key words, for example **File** or **Queue**.

File menu

The **File** menu allows you to handle files, that is, to open an existing file or to create a new one. A pop-up menu gives you the choice of: **New**, **Open**, **Save**, **Save as**, and **Exit**. In the following explanations, the associated tool bar icon providing a shortcut to that entry is displayed.



Creates a new CommonStore Archiving Client session.



Enables you to reopen a CommonStore Archiving Client session by loading the corresponding CommonStore file. A file selection box will be displayed, where you can browse through your file system and select the CommonStore file to be loaded. CommonStore files have the extension `.csw`. After loading a CommonStore file, the name of the opened file appears on the title bar.



Enables you to save the settings of the current CommonStore archiving client session in a CommonStore file. When saving a CommonStore session for the first time, a file selection box will be displayed, where you can browse through your file system and select the directory and file name to which the CommonStore session should be saved. A CommonStore file will then be created with the specified name. CommonStore files have the extension `.csw`. After saving the current session, the name of the saved file appears on the title bar. If you subsequently choose to save the current session, no more file selection boxes will appear, but the changes will be recorded in the name displayed in the title bar.

Save as

Works similar to **Save** when saving a CommonStore session for the first time. It also allows you to create a duplicate of the loaded CommonStore file under a new name.

Exit Allows you to exit the application. If you performed changes during the current CommonStore session and they have not been saved before, you will be prompted to save the changes.

Queue menu

The **Queue** menu allows you to specify all actions you want to perform on the selected queue:

New queue (Ctrl+I)

Calls the panels needed for allocating a new CommonStore queue.

Delete (Ctrl+D)

Removes the selected queue from your working environment.

Properties (Ctrl+Shift+P)

Shows the property dialog for the selected queue.

Import (Alt+F1)

Starts an importation action for the highlighted queue. This menu entry is enabled only if the selected queue is not importing already.

Stop importing (Alt+F2)

Stops the importation action for the highlighted queue. This menu entry is enabled only if the selected queue is importing.

Early archiving to WFL (Alt+F5)

Starts an early archiving action for the highlighted queue. This item is enabled only if the connected server is a CommonStore Server Version 7 or later, if the document type of the queue is customized (see also “Creating queues” on page 25), and if the queue is not archiving already.

Late archiving (Alt+F6)

Starts a late archiving action for the highlighted queue. This item is enabled only if the queue is not archiving already.

Stop archiving (Alt+F7)

Stops the archiving action of the highlighted queue. This menu entry is enabled only if there is an archiving action running for the queue.

Connections Info (Ctrl+F1)

Displays information about the server connections. This menu entry is enabled only if there are existing queues. See “Switching server connections” on page 70 for more information.

Document menu

The **Document** menu allows you to specify all actions you want to perform on the selected document(s) of the active queue.

Early archiving to WFL

The appended submenus allow you to perform an early-archiving-operation on the following documents:

- Selected documents. To do so, click **Archive selected item(s)**
- All documents in a queue. To do so, click **Archive all items** or press **Alt+F5**.

The submenu items are enabled only if the connected server is a CommonStore Server Version 7 or later, if the document type of the queue is customized (see also “Creating queues” on page 25), and if and the queue is not archiving already.

Late archiving

The appended submenus allow you to perform a late-archiving-operation on the following documents:

- Selected documents. To do so, click **Archive selected item(s)**
- All documents in a queue. To do so, click **Archive all items** or press **Alt+F6**.

The submenu items are enabled only if the queue is not archiving already.

Stop archiving (Alt+F7)

Stops the archiving action for the active queue. This menu entry is enabled only if there is an archiving action running for the queue.

Delete document (Alt+D)

Removes the selected documents from the queue. You will be prompted to remove the document files from the file system as well. Alternatively you can press the **Delete** key.

View document (Alt+V)

Views the selected document in the right frame.

Setup menu

The **Setup** menu allows you to specify and change the essential settings for the CommonStore Archiving Client.

Run setup (Alt+F8)

A dialog appears in which you can specify your settings for the CommonStore Archiving Client and for the CommonStore Server to be contacted. These settings include:

- Trace file
- Log file
- API-DLL trace file
- Work path for the CommonStore Archiving Client
- Number of bar codes to be sent to SAP R/3 in a batch when performing late archiving.

To create queues, you must load modules. For detailed information see “Setting up the CommonStore Archiving Client” on page 21.

Save settings to file

This menu item is needed for propagating the CommonStore Archiving Client to other workstations. See “Distributing the CommonStore Archiving Client to other PCs” on page 32.

Automatic processing menu

The **Automatic processing** menu allows you to specify at which intervals an automatic import with subsequent archiving should be performed for all allocated queues in the current session.

Enable (Alt+F9)

Allows you to specify the time interval between two automatic processes. You must select the early-archiving or the late-archiving mode for all queues. Additionally, you can select whether the automatic processing should be stopped if an error occurs.

Stop (Alt+F10)

Stops the automatic processing.

Important

While automatic processes are running, you cannot perform the following tasks:

- Create queues
- Change queue properties
- Switch server connections
- Change the preferred server connection
- Display the connection status

View menu

The **View** menu lets you hide/view the tool bar and the status bar.

Help menu

The **Help** menu lets you display information about the product and its version.

Chapter 16. Perform early archiving without OLE

Early archiving without OLE is performed without SAP GUI. On the Client side you need entirely the CommonStore Archiving Client. Before performing early archiving without OLE for the first time, you must check the following items:

1. Check the SAP customizing (see Chapter 10, "Early archiving without OLE" on page 49).
2. The queue you want archive documents from needs to be customized for early archiving by entering the correct document type into the queue panel (see "Creating queues" on page 25).
3. Check that the CommonStore Client is connected to a CommonStore Server Version 7 or later.

Follow these steps for performing early archiving:

1. Import documents into the queue you want to archive from. See also "Importing documents" on page 67.
2. Select the documents you want to archive or the queue for archiving all documents of the queue.
3. Perform the early archiving action. See "Archiving documents" on page 68 for details.

Successfully archived documents disappear from the CommonStore Archiving Client, otherwise an error message is displayed.

Note

The early archiving process can be started periodically for all queues of the running session by using the Automatic Processing feature of the CommonStore Client. Refer to Chapter 19, "Automatic processing" on page 83 for more detailed information on this.

Chapter 17. Perform early archiving with OLE

Early archiving with OLE requires running the SAP GUI. Additionally the CommonStore Archiving Client is needed for OLE communication and performing archiving. Before using this scenario for the first time:

1. Check the SAP customizing (see Chapter 9, “Early archiving via OLE” on page 47).
2. Ensure that the CommonStore Archiving Client is connected to any CommonStore Server.

Follow these steps for performing early archiving:

1. For SAP releases up to 4.5, click **Office** → **Optical archiving** → **Early Archiving**. For SAP Release 4.6, click **Office** → **Business Documents** → **Documents** → **Move**.
2. Choose the SAP **fast entry** or **presetting** (in SAP Release 4.6) which your document type belongs to and double-click the entry. A new panel appears.
3. Now SAP offers you the following ways of archiving documents:
 - a. If you press **Continue** or the **green hook** (depending on the SAP release), one OLE call for early archiving will be sent to the CommonStore Archiving Client, which archives either the first document of the active queue or the first selected document in the active queue.
 - b. If you press the **Mass archiving** button, subsequent OLE calls for early archiving will be sent to the CommonStore Archiving Client until all the documents in the active queue have been archived.

Important

CommonStore archives only those documents that you selected in the queue. If you selected only one document, clicking **Mass archiving** results in the archiving of just this one document.

For each archived document a work item will be created in the inbox of the organizational object customized for early archiving of this document type. An organizational object can be a user, a group of users or a job to which a group of users has been assigned.

Note

If you are using single document archiving, you get a “Scan queue empty” message from SAP if you try to archive a subsequent document. You need to click the **Continue** button again for archiving a further document.

Chapter 18. Perform late archiving with bar code

Late archiving requires no SAP GUI on the client side. However, before using this scenario for the first time:

1. Check the SAP customizing for late archiving with bar code (see also Chapter 11, "Late archiving with bar code" on page 51).
2. Check the Archive setup in the server configuration profile (default archint.ini) for the archives that you want to use. The LOGICAL_SYSTEM keyword within the ARCHIVE statement has to point to the correct logical SAP system for uploading the bar codes.
3. Ensure that the CommonStore Archiving Client is connected to any CommonStore Server.

For performing late archiving, proceed as follows:

1. Import documents into the queue you want to archive from (see also "Importing documents" on page 67).
2. Select the documents you want to archive or the queue for archiving all documents of the queue.
3. Perform the late archiving action (see "Archiving documents" on page 68 for details).

Successfully archived documents disappear from the CommonStore Archiving Client, otherwise an error message is displayed.

Note

The late archiving process can be started periodically for all queues of the running session by using the Automatic Processing feature of the CommonStore Client. Refer to Chapter 19, "Automatic processing" on page 83 for more detailed information on this.

Chapter 19. Automatic processing

To import and archive documents for all queues at regular intervals and unattended, select the menu entry **Autom. Processing** → **Enable**. In the appearing dialog you can choose the interval between two times of execution and the archiving method. Enter the following settings:

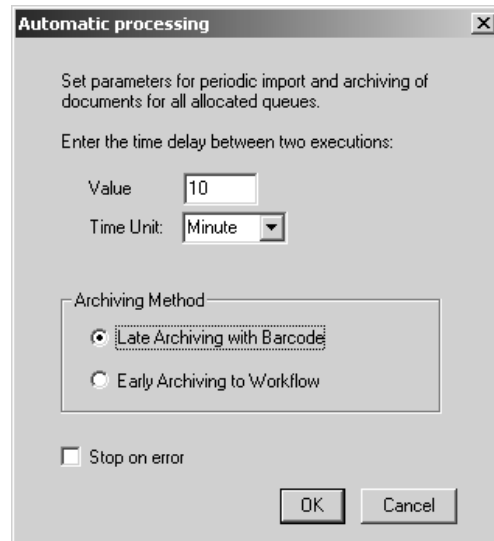


Figure 14. Automatic processing

Value	Numeric value of the interval
Time Unit	Time unit (hours, minutes) of the interval

Note

Thus, if you specify a **value** of 5 and minutes as the time unit, new documents are imported and archived every five minutes.

Archiving method	Select the archiving method you want to be performed periodically on all queues of the running session. By default late archiving with bar code is used.
-------------------------	----------------------------------------------------------------------------------------------------------------------------------------------------------

Note

Archiving method early archiving to WFL can be selected only if the connected server is a CommonStore Server Version 7 or later, and if the document type is customized for all queues. See “Installing the package” on page 16 for detailed information on customizing the document type.

Stop on error Check if you want a message to be displayed in case of an error during automatic processing runs. Leaving this check box unchecked generates log file entries only if errors occur.

Start automatic processing by clicking the **OK** button. Clicking the **Cancel** button discards your settings for automatic processing.

Immediately after starting automatic processing, for each queue in the current session import and archive actions will be started. These actions will be repeated after the specified time is up.

Important

While automatic processes are running, you cannot perform the following tasks:

- Create queues
- Change queue properties
- Switch server connections
- Change the preferred server connection
- Display the connection status

Chapter 20. Viewing documents via OLE

CommonStore supports viewing archived documents via the OLE interface. To get this scenario working:

1. Check the SAP customizing for document viewing via OLE. See also Chapter 12, "Viewing documents via OLE" on page 53.
2. Check if the CommonStore Viewing Client is installed and set up for either native viewing or browser viewing. See also "Installing the package" on page 16.
3. View a document from the archive in which the transaction corresponding to your action is stored. For example, for viewing documents assigned to a financial accounting document, click **Environment** → **Object Links**. Select the **Archived documents** radio button in the **Choose Object Links** panel. A list of archived documents linked to this financial accounting document will be displayed. Double-click the archived document that you wish to display. The CommonStore Viewing Client, started by the SAP GUI via OLE, will launch the customized viewing application.

Note

If you are using browser viewing you may append notices to the documents by the process note applet or send the document to another clerk via the mailing applet.

Process note applet

When displaying an archived document, CommonStore offers the possibility of adding notes, which will be archived too. Archiving notes makes it easier to share information on archived documents and on business processes connected to the archived documents. The look and feel when creating a note with CommonStore is similar to that of creating a note using the SAP ArchiveLink viewer. New notes will be appended to the existing ones. The note's date and time of creation will be saved. If SAP is customized to also send user information to CommonStore, this information will also be archived. Notes created using the ArchiveLink Viewer are compatible with notes created using CommonStore.

Note

To be able to attach notes to a document, you need the CommonStore Server release 2.x or later.

Mailing applet

When using a browser for displaying a document, the browser facilities can be used for sending e-mails and attaching the archived document to this e-mail. But if you have the possibility of archiving notes to a document, you also want to have the option of sending them by e-mail. Using the CommonStore e-mailing feature makes it possible to send an archived document in addition to the archived notes for this document.

Note

To send the archived document as an e-mail including the attached note via CommonStore, you need the CommonStore Server release 2.1.5.0 or later.

You must specify the mail server to be contacted for sending e-mails in the server configuration profile (that is, archint.ini). You do this with the help of the MAILSERVER keyword.

Chapter 21. Viewing print lists via SAP ArchiveLink

For viewing print lists via SAP ArchiveLink, proceed as follows:

1. Check the SAP customizing for viewing print lists. See also Chapter 13, “Viewing print lists via SAP ArchiveLink” on page 55.
2. Check the settings for the SAP ArchiveLink viewer. See also “Viewing documents with the SAP ArchiveLink viewer” on page 39.
3. Use the transaction code **OADR** for accessing print lists. A search panel appears.
4. Enter your selection criteria.
5. Press the **Execute** button to get a hit list of all print lists matching your search criteria.
6. Highlight the print list to be viewed.
7. Press the **Display from archive** button.

Depending upon the settings in the communication protocol (see “Customizing the Archlink protocol for viewing documents” on page 62) the print list will be viewed in the SAP GUI or the SAP ArchiveLink viewer.

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