IBM Content Manager for iSeries

IBM

Getting Started with Client for Windows

Version 5 Release 1

IBM Content Manager for iSeries

IBM

Getting Started with Client for Windows

Version 5 Release 1

> **Note**
>
> Before using this information and the product it supports, read the information in "Appendix. Notices" on page 23.

First Edition (May 2001)

This edition applies to Version 5.1 of IBM Content Manager for iSeries (product number 5722-VI1) and to all subsequent releases and modifications until otherwise indicated in new editions. This edition replaces SC34–3138–00

Contents

About this guide

This guide describes how to plan for, install and start using IBM Content Manager for iSeries Client for Windows. The client application for Windows provides the user interface that lets you receive, classify, use, store, and view documents using the IBM Content Manager for iSeries solution. Use the Client for Windows to:
- Store documents from a scanner or external files into the IBM Content Manager for iSeries system
- Index documents and place them in folders
- Search for specific documents and folders
- View documents
- Add comments or highlights to documents
- Export documents as external files
- Route documents and folders through a process

Who should use this guide

Use this guide if you help plan, administer, maintain, or work with documents using Client for Windows.

Although this guide is written for the end user, if you are the system administrator for the Client for Windows, you can use this book to review the procedures users follow and to assist them in using the product effectively in your enterprise.

The Client for Windows runs on the following versions of Windows®:
- Windows 98
- Windows NT® 4.0
- Windows 2000
- Windows Millenium Edition

How this guide is organized

This guide contains the following chapters:
- "Chapter 1. Introducing the client application for Windows" on page 1, gives an overview of the Client for Windows. It introduces the basic concepts, describes the capabilities of the system, and presents a sample implementation.
- "Chapter 2. Planning and installing the Client for Windows" on page 9, helps you plan and install the Client for Windows installation.
- "Chapter 3. Using client application for Windows" on page 17, explains how to logon to the Client for Windows, describes the individual Client for Windows features, and describes how to access online help.

How to use this guide

This guide complements the online help available with the Client for Windows. The guide focuses on how to plan for, install and log on to the Client for Windows. The online help provides detailed descriptions of the menu items, windows, and client application tasks and procedures.

Help is available for all program windows and tasks. The type of help that appears in the window depends on what choice you are selecting or what task you are performing when you request help.

If you are not familiar with the Microsoft® Windows operating system, refer to the Windows online help and tutorials.

Style conventions

To help you easily understand the text, this book uses the following conventions:

When you see:	It denotes:
Bold	Names of controls and push buttons in a window
Italic	• Terms defined for the first time in the book • Names of books or other publications • Information that you can specify in an entry field • Information that the program displays in an entry field

Prerequisite and related information

Use the iSeries Information Center as your starting point for looking up iSeries and AS/400e technical information. You can access the Information Center in one of two ways:

- From the following Web site: http://www.ibm.com/eserver/iseries/infocenter
- From CD-ROMs that ship with your Content Manager for iSeries order.

Information included in your product package

The *IBM Content Manager for iSeries* CD-ROM contains each publication in portable document format (.PDF).

Table 1 shows the publications included with IBM Content Manager for iSeries. When you order IBM Content Manager for iSeries, you also receive IBM Content Manager for iSeries Client for Windows. You can also separately request Client for Windows.

Table 1. IBM Content Manager for iSeries publications

File name	Title	Publication number
c2711330.pdf	*Planning and Installing*	SC27-1133-00
c2711350.pdf	*Getting Started with Client for Windows*	GC27-1135-00
c2711360.pdf	*System Administration Guide*	SC27-1136-00
c2711370.pdf	*Messages and Codes*	SC27-1137-00
c2711380.pdf	*Understanding Advanced Workflow*	SC27-1138-00
c2711390.pdf	*Application Programming Guide and Reference*	SC27-1139-00

Copying the PDF files: To copy the PDF files from the CD-ROM to your hard drive:

1. Change to the directory for the language that you are using (for example, ENU for English).
2. Copy *.PDF files to your designated hard drive directory

Installing the PDF reader: The Adobe Acrobat Reader is available from http://www.adobe.com. To install Acrobat Reader, follow the instructions in the Acrobat installation program or the installation text file.

Support available on the Web

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

```
http://www.ibm.com/software/data/cm/
```

The documentation is included in softcopy on the product CD-ROM. To access product documentation on the Web, click **Library** on the product Web site.

Operations Navigator

IBM iSeries Operations Navigator is a powerful graphical interface for managing your iSeries and AS/400e servers. Operations Navigator functionality includes system navigation, configuration, planning capabilities and online help to guide you through your tasks. Operations Navigator operation and administration of the server easier and more productive and is the only user interface to the new advanced features of the OS/400 operating system. It also includes Management Central for managing multiple servers from a central server.

For more information on Operations Navigator, see the Information Center.

Information available on the World Wide Web

More iSeries information is available on the World Wide Web. You can access general information from the iSeries home page, which is at the following Web site:

```
http://www-1.ibm.com/servers/eserver/iseries/
```

To access workshops on advanced iSeries functions, use the Technical Studio, located at:

```
http://www.iseries.ibm.com/tstudio
```

How to send your comments

Your feedback helps IBM to provide quality information. Please send any comments that you have about this publication or other IBM Content Manager for iSeries documentation. You can use either of the following methods to provide comments:

* Send your comments from the Web. Visit the IBM Data Management Online Reader's Comment Form (RCF) page at:

  http://www.ibm.com/software/data/rcf

  You can use the page to enter and send comments.
* Send your comments by e-mail to comments@vnet.ibm.com. Be sure to include the name of the product, the version number of the product, and the name and part number of the book (if applicable). If you are commenting on specific text, please include the location of the text (for example, a chapter and section title, a table number, a page number, or a help topic title).

Chapter 1. Introducing the client application for Windows

The IBM Content Manager for iSeries solution provides leading-edge technology to bring the world's resources to your computer desktop. IBM Content Manager for iSeries can help you maximize the value of your information, documents, and multimedia assets while protecting digital intellectual property. The open, scalable nature of IBM Content Manager for iSeries allows a solution to be uniquely suited to your enterprise.

The IBM Content Manager for iSeries client application for Windows provides an interface that enables you to bring documents into the system, view and work with the documents, and store and retrieve them. With the client application for Windows, the basic flow of documents and information is: to store a document into the system, you import it from a directory or capture it by scanning its pages. You then index the document with information that will help you identify it and retrieve it later. From that point, you can electronically route the document to other users who might do the following:

- Organize documents into electronic folders
- Retrieve groups of related documents and folders
- Start a document or folder on a process
- Route a document to other users for additional processing
- Add comments or highlights to a document

There are many ways to customize the IBM Content Manager for iSeries system to fit the business needs of your enterprise. Your exact process depends on how your enterprise has chosen to implement and configure the system.

When you read this book, keep in mind that your system configuration and user ID privileges determine what options are available to you and what tasks you can perform. You might not be authorized to perform some of the tasks described in this book. Your system administrator can tell you what options are available.

A "client application" can refer to any custom-built client application. However, for most purposes in this book, "Client for Windows" and "client application for Windows" are the same.

What's new in this release of Client for Windows

Client for Windows continues to increase and improve function to meet the ever-increasing needs of business.

Table of Contents enhancements
> The table of contents enhancements include:
> - A new ″Explorer-like″ interface for workbaskets, search results, and folders, providing a more familiar interface for Windows users and the ability to ″drill down″ into folders without opening new windows.
> - A view of the total count and number selected.
> - Merge of ″Selected″ and ″Process″ menus into an ″Actions″ menu.
> - New context (pop-up) menus.

New Process dialogs

> **Change Owner dialog**
> > A new Process ″Change Owner″ window is provided to allow you

to change the ownership of selected work packages. **Note:** After the ownership is changed, a person who accesses a user workbasket can only see documents or folders that they own (or that are not owned by another person).

History dialog

A new Process ″History″ window is provided to show all history events associated with a selected work package.

Set Variable dialog

A new Process ″Set Variable″ window is provided with a button that allows you to create a new Process variable.

Usability Enhancements

New usability function has been added, including:

- Ability to request that the Index and notelog dialogs are always opened when documents are opened.
- Index dialogs remember previous size and position.
- Import dialog stays open until it is explicitly closed.
- The table of contents is refreshed after any of its items are re-indexed.

Enhanced OLE APIs

New enhancements are provided with this release, including print-related enhancements. See the *Application Programming Guide and Reference* for more information.

New ″attribute value list″ user exits

New ″attribute value list″ user exits allow an administrator to extend the Edit Index dialog box to include combo-box (drop-down list) controls. These user exits can be implemented to simplify the indexing process by listing only the valid values for a given key field.

Support for a Drag and Drop interface between Tables of Contents

The client application now supports a Drag and Drop interface between Tables of Contents. This provides a more natural interface for moving documents from folder to folder or workbasket to workbasket.

Support for workbasket item counts

Users can now indicate a specific set of workbaskets for which they want to see item counts. At sites with large numbers of workbaskets, this is useful for users who want to know how many items are in some workbaskets but who do not want to pay the performance price to get counts for all the workbaskets.

New Basic Search memory feature

The Basic Search dialog now remembers the last index class that was used for a search. While the Advanced Search functions are still necessary for users who need to make complex queries or save multiple types of searches, this enhancement is convenient for users who often need to make simple searches over the same index class.

New Retrieve menu item for object staging

A new menu item and action list item is provided to allow items to get staged to disk from tape or other secondary storage media.

New Storage Location indicator

A new menu item is provided at a document level to indicate whether the document's parts are staged in the Object server on disk, on tape, or on CD. This status is visible as a new optional column in the table of contents (and accessible from the layout menu and dialog).

Support for additional languages

You can install multiple language versions of the client (that create multiple entries on the Start menu). This feature can be used, at run time, to select the language you want to use.

Client application for Windows concepts

The client application for Windows uses the following concepts. For an example of how the concepts might apply to an actual working system, see "Example of a client application for Windows implementation" on page 6.
- Document
- Folder
- Tables of Contents
- Workbasket
- Process

A *document* is an item that can be stored, retrieved, and viewed. A single document can contain different types of base parts, including text, images, annotations, and objects such as spreadsheet files.

A *folder* is a way to group related documents and other folders together. Grouping items in folders makes them easier to retrieve. In addition, the client application for Windows uses folders to display search results after you search the fileroom. The system administrator can define other ways to use folders in your system.

A *table of contents (TOC)* enables you to access documents and folders for processing. They are windows that list the contents of a workbasket or folder, or the results of a search.

A *workbasket* is a temporary holding place for documents and folders that are either in process or waiting to be processed. Items in the workbasket are ordered much like items in a queue. A workbasket definition includes the rules that govern the presentation, status, and security of its contents. Your system administrator can define workbaskets to organize your work. A *user-selected* workbasket enables you to select documents and folders from a Table of Contents. A *system-assigned* workbasket does not have a Table of Contents. It displays items for processing one after the other, based on their assigned priority.

A *process* is a set of procedures and rules that dictate how items are processed in a workflow. Workflow is a system that automates folder and document processing, and eliminates much of the manual work required to route individual elements and groups of documents. A process is composed of routes, collection points, and decision points. A route is a set of steps that describe how an item moves through a process. A collection point is the point in the process where an item waits for designated events to occur. A decision point is the point in the work process where the route to be followed depends on the value of the variable.

Storing documents in the IBM Content Manager for iSeries system

The client application for Windows enables you to bring documents into the IBM Content Manager for iSeries system either by scanning them digitally or importing them as files. IBM Content Manager for iSeries stores documents on an *object server* that can be accessed with different levels of access authority from the various workstations on which the client application for Windows is running.

You can use a scanner to convert your paper documents into document images that you can store and work with in the client application for Windows. You can use the client application for Windows to adjust settings for your scanner, scan documents into the system, and save the scanned documents.

Using the client application for Windows, you can import files from different directories on your workstation or local area network (LAN). The IBM Content Manager for iSeries system supports a variety of data formats for importing files, and your system administrator can define additional ones.

You can also export files from IBM Content Manager for iSeries to other directories on your workstation or LAN. You might want to export files to use them with another application or move them to another location.

The IBM Content Manager for iSeries system library server uses a relational database manager to manage objects and provide data integrity by maintaining index information and controlling access to objects stored on one or more object servers. The library server directs requests from clients to query, retrieve, and print items in the database, which contains object indexes and other information. The library server routes requests to the appropriate object server to store, retrieve, and delete objects.

IBM Content Manager for iSeries system stores and retrieves objects that reside on an object server through requests routed by the library server. An object server is the repository for objects stored on the system.

Adding retrieval information

To retrieve documents stored in your IBM Content Manager for iSeries system, you *index* them by assigning them values for predefined *key fields.* You can index individual documents as well as folders that contain multiple documents. To index an item, you select an index class and then type in appropriate key field values for it.

An *index class* is a category that identifies a group of documents and folders stored in the fileroom. Your system administrator creates index classes that reflect the business needs of your enterprise. Each index class includes a set of key fields, which are categories of information such as "Name" and "Social Security Number" that help to uniquely identify an item.

Although the indexing procedure is fairly simple, the indexing information you assign to a document or folder is very important. It influences how the item is stored, retrieved, presented for display, and processed.

Searching for specific documents and folders

The client application for Windows provides a search capability to search the fileroom for specific items.
- You can retrieve items within a single index class, or in all classes, by specifying index field values as search criteria.
- You can retrieve items by specifying process information as search criteria.

Working with documents and folders

The client application for Windows provides the following options for working with documents and folders:
- Checking out and in
- Adding or removing from a folder or workbasket
- Routing
- Suspending
- Changing priority
- Displaying
- Annotating
- Deleting
- Exporting
- Printing

In the client application for Windows, processing documents and folders means specifying how and where they should be routed for work, and whether they are available to work on. Processing includes:

Checking documents and folders out and in
Checking out a document or folder ensures that only one user is working with the item at a time. When you check out an item, other users can view it, but cannot perform any processing tasks on it. When you check in a document, you free it for other users to process.

Routing documents and folders to workbaskets
You can use workbaskets outside of a predefined process to route work manually within your organization. Processing documents without a process might be necessary if you have information or procedures that require more flexibility than automated processes typically allow. The ad hoc routing capability allows you to route a document or folder from one workbasket to another. For example, you might route a document or folder to the workbasket of a supervisor if you discover a problem with it. When you store documents in the system you can assign them to a default workbasket.

Suspending documents and folders
Suspending a document or folder makes it temporarily unavailable to users working with system-assigned workbaskets. You can suspend a document or folder until a specified date and time. In addition, you can suspend a folder until documents of one or more selected index classes are added to it.

Changing the priority of documents and folders
Changing the priority of a document or folder moves it up or down in the processing order in a system-assigned workbasket.

Moving documents and folders through a process
You can use workbaskets within a predefined process to automate the flow of work in your organization. When you use workbaskets within the workflow system, the flow of work is determined by the way you set up a process. When you finish processing a document or folder, you can continue the item to the next step in the process, move it to another process, or remove it from the process. A document or folder can also be automatically started on a process based on its index class definition.

Working with displayed documents

The client application for Windows provides a variety of functions for working with document images. Although you cannot change the text or the image of the document itself, you can use the viewing functions as tools to make your job easier.

If your system administrator has given you the authority to do so, you can annotate documents in a number of different ways. For example, you might want to add highlighting or notes to an important section of a document.

Other tools can help you move quickly to the page you want in a document or group of documents, or zoom in on a portion of a document to read small print.

Printing documents

You can print documents when you have them displayed or selected in a TOC window.

Example of a client application for Windows implementation

To illustrate how the client application for Windows might be tailored to a specific environment, imagine the claims department for an insurance company where employees gather information on pending claims and resolve them. Their processes involve large amounts of paperwork and sharing of documents and information.

To convert the existing processes to a IBM Content Manager for iSeries system, the system administrator would create the following items in IBM Content Manager for iSeries:
- Index classes
- Key fields
- Document folders
- Workbaskets
- Process

The system administrator might set up user IDs with limited access privileges for employees who perform only the scanning or the indexing phase of their business. Employees who review claims might have greater access that permits adding notes and changing index information, but not deleting documents. Still other users might require even more extensive privileges to resolve problem claims or correct mistakes.

Index classes and key fields

The index classes are like file cabinets. They represent the main categories into which the company's documents are sorted. The insurance company system might contain the following index classes:
- Claim forms
- Appraisals
- Policies
- Accident reports
- Medical reports
- Correspondence

Each index class can contain a different set of key fields. For example, the Appraisal class of documents might include key fields labeled "Last Name", "Claim Number", and "Appraisal Amount". When an employee of the insurance

company needs to retrieve a particular appraisal, the name, claim number, or appraisal amount can be used to search for the required document.

System administrators can define subsets of Index classes. Individual users may only have access to some subsets and not all the fields of the index class.

Folders

As documents enter the system, the client application can automatically sort and store them into folders. For example, the system administrator can have the client application automatically store all items indexed with the same claim number in a single folder. In this way, the client application automatically groups all the documents for a particular claim together. A folder can also contain the results of a search of the system. When a system user opens a folder, a Table of Contents window (TOC) lists the documents in the folder. Claims adjusters or other users can view claims for a particular policy holder by accessing them from a TOC.

Workbaskets and processes

Users can process documents according to the workbaskets the documents are assigned to. Newly scanned or imported documents might start in a specific workbasket, so that a person assigned to index them would find the required documents collected in one location. Once they are indexed, the documents can be started on a predefined process which will control the flow of work. For example, you may have a claims process. This process could be a simple sequential process consisting of two workbaskets: a workbasket assigned to a claims processor and a workbasket assigned to a senior processor. When items are started on the process, they are assigned to the initial claims processing workbasket. When a claims processor completes work on a routine form, they select to continue the item on the process. The item is automatically sent to the workbasket for the senior processor to review.

An ad hoc routing capability is also provided, which allows you to route work outside a predefined process. If a claim presents problems, the claims processor can reassign it to a workbasket for a supervisor.

Chapter 2. Planning and installing the Client for Windows

This section explains how to plan for and install the Client for Windows. The Client for Windows provides a user interface to the IBM Content Manager for iSeries system and its contents from Windows desktops. The client toolkit enables you to build your own Internet or desktop client applications that access data and objects managed by IBM Content Manager for iSeries. Your IBM® sales representative can work with you during the planning process to provide more detailed information about planning considerations.

Planning the Client for Windows

Table 2 defines the hardware required to install and use the client application for Windows. Table 3 lists the operating system, networking and disk space required to install and use the client application for Windows.

Table 2. IBM Content Manager for iSeries Client for Windows hardware requirements

Component	Description
Processor	Intel Pentium® or equivalent
RAM	64 MB or greater
Hard disk	160 MB fixed disk
Display	VGA (800x600 resolution and 256 color mode)
Other hardware	• CD-ROM reader (installation only) • network adapter (if components are installed on multiple workstations) • ASPI-compliant SCSI adapter or scanning • Mouse

Table 3. IBM Content Manager for iSeries Client for Windows software requirements

Component	Description
Operating system	One of the following: • Windows 98 • Windows NT 4.0 • Windows 2000 • Windows Millenium Edition
Network communication	TCP/IP installed with Windows
Disk space	• Client application: 50–75 MB depending on components chosen. • Toolkit only: 20 MB
Other	C Runtime Library — required for Client Toolkit

Planning to create customized applications with the client toolkit

The development toolkit enables you to create customized IBM Content Manager for iSeries applications by using client APIs and user exit routines. You can use these APIs to:

- Access information in the library server and object server
- Customize document processing
- Design your own data model

You must start the Microsoft Developer Studio from the same user ID you use to install your IBM Content Manager for iSeries components, prior to installing IBM Content Manager for iSeries to complete the Developer Studio registration with Windows. Using Visual C++ with IBM Content Manager for iSeries components requires additional setup of environmental variables.

Installing the Client for Windows

The installation process automatically overwrites previous versions of the Client for Windows. You are not required to backup or uninstall previous versions. The client application for Windows Version 5.1 is compatible only with a Version 5.1 server.

To install Client for Windows, complete the following steps:

1. Shut down any open Windows applications, including antivirus software.
2. Place the Client for Windows Installation CD-ROM in the CD-ROM drive.
3. Start the Setup program if it did not start automatically when you inserted the Client for Windows Installation CD-ROM.
4. The Choose Setup Language window opens. Select the language for your system configuration.
5. The Welcome window opens. Click **Next**.
6. The Software License Agreement window opens. Read the License Agreement. If you accept all the terms, click YES to proceed with the installation. Otherwise, click No, to end the installation program.
7. The Choose Destination Location window opens. Click **Next** to accept the default Destination Folder path defined by the install program. Click **Browse** to define another path for the Destination Folder directory.

   Note: If you have a previous version of the product, the installation program detects the location of the previous version and prompts you to install Version 5.1 in the same folder.

8. The Select Components window opens with the default components preselected. The list below describes all the client application for Windows component. Click the checkboxes next to Toolkit and Scanning to install those components. Click **Next**.

   Client application
   Install the client application to work with documents and folders in the IBM Content Manager for iSeries system.

   Viewer
   The client application requires the viewer in order to display documents. The standard viewer can interpret and display image and

text documents that were created in 19 different file formats. "Standard Viewer file format support" on page 12 lists the file formats supported by Viewer.

Additional formats
Install this optional subcomponent to view additional, non-image file formats. "Support for additional formats" on page 12 lists the additional file format types that you can view if you choose the Additional formats support subcomponent

Additional languages
Select this subcomponent to install additional language versions of the client application for Windows. You are prompted for specific language choices when you press **Next**.

Scanning
This optional subcomponent installs the interface and the software that lets you use Client for Windows to scan documents directly into Content Manager for iSeries.

Common Files
The common files are utilities and components required by the client application or any other Content Manager for iSeries client program.

Toolkit
The toolkit is a set of APIs that enables you to create customized programs. The toolkit includes the files necessary to compile and link your applications. It also includes some sample applications.

9. The Server Connection Information window opens unless the installation program detects a FRNOLINT.TBL network table. If the network table is detected, this step will be skipped. If a Network Table is not detected, you have one of three options:

- Generate a new Network Table.
- Copy an existing network table.
- Generate a Network Table later.

Generate a new Network Table.
To generate a new Network Table, select either TCP/IP or APPC.

If you select TCP/IP, the default settings for the Server Name, the Host name, and the Port number are displayed.

If you select APPC, the default settings for the Server LU name and the TP name are displayed.

Click **Next** to accept the default settings provided.

Copy an existing network table.
If you made a backup copy of a network table from a previous version of client application for Windows, click **Copy Network Table from** and click **Browse** to locate the previously-saved FRNOLINT.TBL file.

Generate a Network Table later.
Click **Generate Network Table later** to create a network table after the installation is complete.

10. The Select Program Folder window opens. Click **Next** to accept the default Program Folders path. If required, select a program from the Existing Folders list and click **Next**.

11. The Start Copying Files window opens. The installation program copies the client application for Windows program files to your computer.

Standard Viewer file format support

The list below contains the file formats supported when you install the Standard Viewer.

1. ASCII
2. Bitmaps
3. DCX (FAX)
4. EBCDIC
5. GIF
6. HTML
7. IOCA FS11 (IBM's Image Object Content Architecture -- Function Set 11)
8. JPEG
9. Lotus® 1-2-3®
10. Microsoft Excel (versions 2.1, 3.0, 4.0, 5.0, 7.0)
11. Microsoft Word (DOS versions 3.0, 4.0, 5.0, 5.5, 6.0; Windows versions 1.0x, 2.0x, 6.0x, 7.0 and '97; Macintosh versions 3.0, 4.0, 5.0, 5.1, 6.0)
12. MO:DCA (IBM's Mixed Object: Document Content Architecture)
13. PCX (Paintbrush)
14. PDA (Calera's Processed Document Architecture)
15. PDF (Adode's Portable Document Format)
16. PNG (Portable Network Graphics)
17. RTF
18. TIFF
19. WordPerfect (DOS versions 4.1, 4.2, 5.0, 5.1, 6.0, 6.1; Windows versions 5.1, 5.2, 6.0, 6.1; Macintosh versions 1.0, 2.0, 2.1, 3.0, 3.1, 3.5)

Support for additional formats

Install the Additional Formats subcomponent to view these file formats:

1. Ami Pro for Windows version 1.1, 1.2, 2.0, 3.0, 3.1; Ami Pro for OS/2®
2. Digital DX, WPS-Plus
3. Display Write V2, V3, V4, V5
4. Enable ver 1.2, 2.0, 2.15
5. Framework III version 1.0, 1.1; Framework IV
6. DCA - Final Form text
7. HP AdvanceWrite Plus
8. IBM Writing Assistant version 1.0
9. Interleaf Publisher version 1.1, 5.2 ASCII, 6.0 ASCII
10. Legacy version 1.x, 2.0
11. Lotus Manuscript version 2.0, 2.1
12. MacWrite version 4.5, 4.6, 5.0; MacWrite II version 1.0, 1.1
13. MASS 11 version 8.0, 8.3, 8.5-9.0
14. Multimate 3.3 - 4.0, Multimate Advantage 3.6, Multimate Advantage II 3.7
15. OfficeWriter version 4.0, 5.0, 6.0, 6.1, 6.2
16. PeachText 5000 version 2.12

17. PFS:First Choice version 1.0, 2.0, 3.0
18. Professional Write version 1.0, 2.0-2.2
19. Q Write version 1.0, 3.0, 4.0
20. Quattro Pro version (DOS) 4,0 (Windows) 1.0, 5.0
21. Rapid File version 1.0, 1.2
22. Revisable Form Text (RFT)
23. Total Word versionr 1.2, 1.3
24. Uniplex onGo
25. Volkswriter version 2.2, 3, 4
26. Wang PC version 3.0
27. Windows Write version 3.0, 3.1
28. WordStar version (DOS) 3.3, 3.31, 3.45, 4.0, 5.0, 5.5, 6.0, 7.0; (Win) 1.x. 2.0
29. WriteNow version 3.0
30. XyWrite III; XyWrite III Plus; XyWrite IV; XyWrite for Windows version 1.0, 4.0

Configuring Communications for Content Manager for iSeries

Communications in a Content Manager for iSeries environment may be either Advanced Peer-to-Peer Communication (APPC) or Transmission Control Protocol/Internet Protocol (TCP/IP).

To use APPC for communications, you must install and configure a communications product that implements APPC and the common programming interface for communications (CPI-C). For example, eNetwork Personal Communications or Client Access/400.

If you choose TCP/IP as your communication protocol, TCP/IP sockets communications support will be used. To enable clients to communicate using TCP/IP, a background server job must be started on the server.

Content Manager for iSeries uses an ASCII file called a *network table file* to map a server name to all of the information needed to communicate with a server. This table is initially created when the Client for Windows is installed. To edit the network table file, you can use any text-based editor. To allow many users to share the network table file, define the environment variable VI400_CONFIG_PATH on each workstation.

Example Network Table Entry for APPC

```
SERVER: AS400DS1 REMOTE TCPIP
    LU_NAME       = USIBMNR.AS400DS1
    TP            = EKDCS01P.QVI
    MODE          = QPCSUPP
    SERVER_TYPE   = FRNLS400
```

Where:

AS400DS1   is the name of the Content Manager for iSeries server that is shown during logon of the Content Manager for iSeries client.

USIBMNR.AS400DS1   is the fully qualified logical unit (LU) name. You

must configure this location as a partner LU name in the CPI-C section of your communication product.

EKDCS01P.QVI	is the transaction program (TP) name to be run. EKDCS01P is the name of the program that starts the Content Manager for iSeries server interface. QVI is the name of the iSeries library where this program is stored.
QPCSUPP	is the mode name to be used. If Client Access/400 is installed, this mode name is available on both the workstation and on the iSeries. The mode name controls connection characteristics of the APPC session.
FRNLS400	is the name of the Content Manager for iSeries library server. You must enter this line exactly as shown.

Example Network Table Entry for TCP/IP

```
SERVER: AS400DS1 REMOTE APPC
    HOSTNAME      = 9.112.17.167
    PORT          = 31015
    SERVER_TYPE   = FRNLS400
```

Where:

AS400DS1	is the name of the Content Manager for iSeries server that is shown during logon of the Content Manager for iSeries client.
9.112.17.167	is the host name or IP address of the server. To verify the host name or IP address, use the PING command.
31015	is the port number that is the identification of an application to TCP/IP. The port defined here must match the port used for the batch server job. See the ″Configuring for TCP/IP″ section in the Planning and Installing manual for further information.
FRNLS400	is the name of the Content Manager for iSeries library server. You must enter this line exactly as shown.

Verifying Installation and Configuration

After installing the Content Manager for iSeries client, you can run the VI400VFY program, shipped with Content Manager for iSeries, to verify proper configuration. To do this, you must use a user ID such as QVIADMIN that has already been defined in the Content Manager for iSeries profile.

After prompting you for a user ID, password, and system name, VI400VFY logs on to the Content Manager for iSeries server, creates an item and object, deletes the item and object, and logs off. It records any errors in VI400.LOG. By running this program, you can verify configuration of APPC, TCP/IP, Client Access/400, the

network table, access to the Content Manager for iSeries shared folder, and that the specified user has been defined to Content Manager for iSeries with sufficient authority to perform these operations.

You can also use the sample VI400VFY.CPP program, shipped with Content Manager for iSeries in the iSeries folder, as a template for creating your own verification programs.

Uninstalling Client for Windows

Use the Windows Add∕Remove Programs feature to uninstall Client for Windows:

Click **Start** ⟶ **Settings**⟶ **Control Panel** ⟶ **Add/Remove Programs** and follow the on-screen prompts.

Chapter 3. Using client application for Windows

This section explains how to start up and logon to the client application for Windows. This section also provides more details about how to use the product features described in "Chapter 1. Introducing the client application for Windows" on page 1.

Starting client application for Windows

To start the client application from Windows select **Start** ⟶ **Programs** ⟶ **IBM Content Manager for iSeries for Multiplatforms** ⟶ **Client Application**.

Do not perform any other operations while the program loads. The program and its environment require several seconds to load.

Prior to logon, user IDs and passwords must be assigned to each user by the system administrator. In addition, the library server and object server must be available on the system. Check with your system administrator if you are not sure about this information.

The client application for Windows Logon window opens, with the main window behind it. At startup, the main window options are disabled until a valid user logs on.

Logging on

To log on, enter your user ID, password, and select the library server name after starting the client application for Windows.

1. Verify that you are logging on to the appropriate library server. Normally, your system administrator has set a default library server. If the Server field does not display the server you want to log on to, select it from the drop-down list by clicking on the Server drop-down box and selecting the correct library server.

2. Enter your user ID. A user ID uniquely identifies each user to the system.

3. Enter your password. If you wish to change your password, click Change. After confirming the password, click OK to save it. To cancel a password change, click Cancel.

4. Press Enter or click **OK**. The status bar at the lower left corner of the window indicates that the logon is in progress. When the logon is successful, the main window opens.

You can exit without logging on by clicking **Cancel** and selecting **File** ⟶ **Exit** in the main window.

Entering documents into the IBM Content Manager for iSeries system

You can enter documents into the IBM Content Manager for iSeries system using the client application for Windows, by either scanning or importing them.

Scanning

Scanned documents are temporarily written to the workstation fixed disk prior to being stored on the object server. Normally, they are written to the

FRNROOT\WORK subdirectory. Be sure you have enough free disk space on the drive where this directory resides. These temporary files are erased as soon as the scanned documents are successfully stored on the object server.

We recommend that you scan and store your documents at a resolution of 200 dots per inch (DPI) or lower. This provides better performance and helps prevent an out-of-memory condition that can result from scanning at higher resolutions.

The first time you use a new scanner, you need to load the scanner driver:

1. From the **File** menu on the main window menu bar, select **Scan**. A dialog called Loading Driver Names opens briefly. The Scanner Selection window opens.
2. Select your scanner from the list.
3. Click OK.

You may need to update the ASPI layer before you first use the scanner. To do so, go to a Command Prompt and run the aspi32.exe utility from \PIXTRAN\ASPI under your Windows directory. You can then verify that the ASPI layer was successfully updated by running the aspichk.exe utility from the same directory or by opening Devices in the Windows Control Panel and seeing whether the aspi32 device has the word Started next to it.

Considerations for specific scanners

HP scanners
> If you are using an HP scanner on Windows 98, you need a special scanner driver from HP. Contact your local IBM support for details on which driver you need.

IBM 2456 scanner with IBM Pentium PC 750
> If you are using an IBM 2456 scanner connected to an IBM Pentium PC 750, ensure that the scanner is at EPROM level 1R0G or higher.

Data formats for scanning
To scan large documents (greater than 50 pages), we recommend using either TIFF6 or MODCA2P data formats.

Do not scan using a 12–bit color data format. Only 24–bit color scanning is currently supported.

While supported data formats for scanning are listed, some scanners may have additional scan modes that are not supported and may produce unpredictable results. The client application for Windows supports the following scan data formats.

Note: Windows NT does not support the GIF format.

Format	Scan modes supported
DCX	Black and white (bi-level)
GIF	Black and white (bi-level)
	16 grayscale
	256 grayscale
	24-bit color
JPEG	16 grayscale
	256 grayscale
	24-bit color

Format	Scan modes supported
MODCA2P	Black and white (bi-level)
	16 grayscale
	256 grayscale
	24-bit color
PCX	Black and white (bi-level)
	16 grayscale
	256 grayscale
TIFF6	Black and white (bi-level)

Using IBM 2456 and Ricoh 410 Scanners under Windows

If you use either the IBM 2456 scanner or the Ricoh 410 scanner under Windows, and you encounter problems, ensure that you contact your IBM Representative to get information on:
- Scanner requirements
- SCSI card requirements
- Scanner ROM versions supported
- Scanner termination and impedance requirements
- WINASPI driver information
- Adaptec 1542C and IBM2456 information

Importing and exporting documents or images

The client application for Windows enables you to import and export files with a wide variety of file types into and out of your IBM Content Manager for iSeries system. You can work with files in many different document file formats, including files for applications such as word processors and spreadsheets.

Importing

You can use the client application for Windows to import files into your IBM Content Manager for iSeries system from different directories on your workstation or local area network (LAN). The system supports a variety of data formats for files that you import, and your system administrator can define additional ones.

Before you begin importing, you need to know the following information about the files:
- What the names of the files are
- Where the files are located
- What format they are in
- Whether you should place the files in a specific workbasket in addition to storing them in the library

If you are unsure about any of this information, contact your system administrator before you begin.

Exporting

You can also export files stored in your IBM Content Manager for iSeries system to other directories on your workstation or LAN. You might export files that you want to use with another application or move to another location. Before you begin exporting files, you need to know the following information:
- What location to export the files to
- Whether to include any note log or annotation information that is associated with the files

It is also important to understand the naming procedure the client application follows when you export files to ensure that you can identify the files after they

are exported. As it exports the files it assigns names and file extensions based on the content of the files and the format they are in. The names it assigns are unique.

Using a Table of Contents window

A Table of Contents window shows a list of documents or folders. The client application for Windows uses Table of Contents windows to organize lists of folders and documents when it opens either a folder, workbasket, or a list of search results. The Table of Contents windows are used to select the documents and folders you want to work with.

In the Table of Contents window results are displayed in a Windows Explorer-style view. A navigation panel on the left side of the screen shows the workbaskets and folders in this Table of Contents. Items that may include other objects have a + symbol next to them. When you click on the + symbol next to a workbasket, for example, all of the folders in that workbasket appear beneath the workbasket.

Indexing documents and folders

IBM Content Manager for iSeries works in a manner similar to the public library system, where books and other printed material are stored and assigned unique locations. All information stored in the library can be located by using a catalog that indexes the printed material by author, subject, publisher, and physical location. IBM Content Manager for iSeries provides this cataloging function through index classes.

Key fields are information stored about the document. Index classes are collections of key fields. Key fields are made up of attributes. For example, an index class named Policies can have key fields with attribute names such as Policy Number, Policy Owner, Premium Due Date. System administrators can define subsets of Index classes. Individual users may only have access to some subsets and not all the fields of the index class.

Searching for documents and folders

In IBM Content Manager for iSeries you locate documents and folders with the Search command. You perform a search by looking for specific data in one or more key fields within a given index class. You can conduct basic and advanced searches. For example, you can search the *Claim* class for all claims pertaining to a customer named John Smith, or all claims pertaining to John Smith for the year 1995. You can also search *All Index Classes* for all documents pertaining to a given customer.

Using workbaskets, folders and workflows

Workflows automate the flow of work by creating predefined work processes through which items are routed. In this process, items can be accessed and worked through workbaskets. Workflow also lets you route work outside of a predefined work process by providing an ad hoc routing capability. This capability lets a user add an item directly to a workbasket without using a predefined process.

Viewing and annotating a document or image

The client application for Windows lets you view and annotate a scanned or imported document or image. For example, after you scan an invoice, you select the invoice and view it. Then you can use one of the annotation tools to highlight a sentence or paragraph. You do not modify the scanned file when you use the annotation tools.

Printing documents

With the client application for Windows, you can print any document from a Table of Contents or you can print one that is open in a document window. You can also print an entire Table of Contents or all the documents contained in a folder. You select options for printing on the Print Item window.

When you print a document, you can print any annotations, index information, or note logs that are associated with it, and you can print selected pages.

Logging off

You can log off the client application for Windows in one of these ways:
- Select **Exit** from the File menu
- Double-click on the system menu symbol in the upper left corner of the window
- Select **Close** from the system menu
- Click the **X** button on the upper right corner of the window

All of the open program windows are closed.

Appendix. Notices

This information was developed for products and services offered in the U.S.A.

IBM may not offer the products, services, or features discussed in this document in other countries. Consult your local IBM representative for information on the products and services currently available in your area. Any reference to an IBM product, program, or service is not intended to state or imply that only that IBM product, program, or service may be used. Any functionally equivalent product, program, or service that does not infringe any IBM intellectual property right may be used instead. However, it is the user's responsibility to evaluate and verify the operation of any non-IBM product, program, or service.

IBM may have patents or pending patent applications covering subject matter described in this document. The furnishing of this document does not give you any license to these patents. You can send license inquiries, in writing, to:

IBM Director of Licensing
IBM Corporation
North Castle Drive
Armonk, NY 10504-1785
U.S.A.

For license inquiries regarding double-byte (DBCS) information, contact the IBM Intellectual Property Department in your country or send inquiries, in writing, to:

IBM World Trade Asia Corporation
Licensing
2-31 Roppongi 3-chome, Minato-ku
Tokyo 106, Japan

The following paragraph does not apply to the United Kingdom or any other country where such provisions are inconsistent with local law: INTERNATIONAL BUSINESS MACHINES CORPORATION PROVIDES THIS PUBLICATION "AS IS" WITHOUT WARRANTY OF ANY KIND, EITHER EXPRESS OR IMPLIED, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF NON-INFRINGEMENT, MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE. Some states do not allow disclaimer of express or implied warranties in certain transactions, therefore, this statement may not apply to you.

This information could include technical inaccuracies or typographical errors. Changes are periodically made to the information herein; these changes will be incorporated in new editions of the publication. IBM may make improvements and/or changes in the product(s) and/or the program(s) described in this publication at any time without notice.

Any references in this information to non-IBM Web sites are provided for convenience only and do not in any manner serve as an endorsement of those Web sites. The materials at those Web sites are not part of the materials for this IBM product and use of those Web sites is at your own risk.

IBM may use or distribute any of the information you supply in any way it believes appropriate without incurring any obligation to you.

Licensees of this program who wish to have information about it for the purpose of enabling: (i) the exchange of information between independently created programs and other programs (including this one) and (ii) the mutual use of the information which has been exchanged, should contact:

IBM Corporation
J74/G4
555 Bailey Avenue
P.O. Box 49023
San Jose, CA 95161-9023
U.S.A.

Such information may be available, subject to appropriate terms and conditions, including in some cases, payment of a fee.

The licensed program described in this information and all licensed material available for it are provided by IBM under terms of the IBM Customer Agreement, IBM International Program License Agreement, or any equivalent agreement between us.

Any performance data contained herein was determined in a controlled environment. Therefore, results obtained in other operating environments may vary significantly. Some measurements may have been made on development-level systems and there is no guarantee that these measurements will be the same on generally available systems. Furthermore, some measurements may have been estimated through extrapolation. Actual results may vary. Users of this document should verify the applicable data for their specific environment.

Information concerning non-IBM products obtained from the suppliers of those products, their published announcements or other publicly available sources. IBM has not tested those products and cannot confirm the accuracy of performance, compatibility or any other claims related to non-IBM products. Questions on the capabilities of non-IBM products should be addressed to the suppliers of those products.

All statements regarding IBM's future direction or intent are subject to change or withdrawal without notice, and represent goals and objectives only.

This information contains examples of data and reports used in daily business operations. To illustrate them as completely as possible, the examples include the names of individuals, companies, brands, and products. All of these names are fictitious and any similarity to the names and addresses used by an actual business enterprise is entirely coincidental.

COPYRIGHT LICENSE:

This information contains sample application programs in source language, which illustrate programming techniques on various operating platforms. You may copy, modify, and distribute these sample programs in any form without payment to IBM, for the purposes of developing, using, marketing or distributing application programs conforming to the application programming interface for the operating platform for which the sample programs are written. These examples have not been thoroughly tested under all conditions. IBM, therefore, cannot guarantee or imply reliability, serviceability, or function of these programs. You may copy, modify, and distribute these sample programs in any form without payment to IBM for the purposes of developing, using, marketing, or distributing application programs conforming to IBM's application programming interfaces.

Trademarks

The following terms are trademarks of International Business Machines Corporation in the United States, other countries, or both:

IBM

iSeries   OS/2

Net.Data

Lotus and 1–2–3 are registered trademarks of Lotus Development Corporation in the United States, other countries or both.

Pentium is a trademark of Intel Corporation in the United States, other countries or both. (For a complete list of Intel trademarks, see www.intel.com/trademarx.htm.)

Microsoft, Windows, Windows NT and the Windows logo are trademarks of Microsoft Corporation in the United States, other countries, or both.

Java and all Java-based trademarks and logos are trademarks or registered trademarks of Sun Microsystems, Inc. in the United States, other countries, or both.

Other company, product, and service names may be trademarks or service marks of others.

Index

IBM ®

Program Number: 5722–VI1