Kofax MarkView 10.1.0 Installation Worksheet for Oracle E-Business Suite

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# Using this worksheet

Use this worksheet to gather the information required to install and upgrade MarkView. This worksheet supplements the information and procedures in the *Kofax MarkView Installation Guide* andthe *Kofax MarkView Upgrade Guide.* Readthe *MarkView Installation Guide* orthe *MarkView Upgrade Guide* to ensure that you perform all the tasks required for your installation or upgrade.

Complete the worksheet before starting the installation or upgrade.

* Complete the Your Information column. If performing a silent installation, complete the installer\_interview.properties and the preliminary\_interview.properties columns. Field names and values cannot contain spaces.
* Have the worksheet available during the installation.
* Save an electronic copy of the completed worksheet for future reference.

To use the MarkView silent installer, refer to the instructions in the *Kofax MarkView Installation Guide*. The tables in this worksheet include references to the field names for the installer\_interview.properties and the preliminary\_interview.properties files. Field names and values cannot contain spaces.

# Pre-installation task information

The database administrator needs the following information to complete the tasks required before installing or upgrading MarkView. See the *MarkView Installation Guide* orthe *MarkView Upgrade Guide,* Chapter 1, ”Before you start,” for more information.

## System information

| **Item** | **Your Information** | **Description** |
| --- | --- | --- |
| **Oracle Database Management  SYS account (RDBMS SYS)** | The database management account to create the MarkView schema and manage table spaces. | |
| MarkView DB User |  | The RDBMS SYSDBA *user name*. For example, markview. |
| MarkView DB Password |  | The *password* associated with the RDBMS SYS account. |
| **RDBMS CTXSYS account** | The DBA account required to prepare CTXSYS for the MarkView Document Library Installation. This is only needed for the MarkView Document Library. | |
| Username |  | The username associated with the CTXSYS account. |
| Password |  | The password associated with the CTXSYS account. |
| **Install Image Files** | |  |
| Installation/upgrade application name | install-image-oracle-x.x.x*.zip  (where x.x.x is the version number)* | Names of the installation/upgrade files from Kofax. |
| Location |  | The location from which to download the installation application from Kofax. Contact Kofax Technical Support. |
| Distribution Directory |  | The location on the server into which you will download and decompress the distribution files. Create a subdirectory for the installation file. For example: $HOME/mvdist/installer |
| MarkView Installation Directory (Target Installation Directory) |  | The directory into which you will install MarkView. |
| **J2EE Application Server Host Information** | Information about the J2EE Application Server (WebLogic, WildFly, or JBoss EAP) host to be used with this MarkView installation. | |
| J2EE AS host name |  | The host name where the J2EE Application Server is installed. |
| J2EE AS administrator’s user name |  | The user name of the administrator who installed the J2EE Application Server. For example, oraias01. |
| J2EE AS administrator’s password |  | The password of the J2EE AS administrator. |
| **MarkView Administration** |  |  |
| MarkView Admin User | ADMIN | The name of the MarkView Administrative User. By default, the user name is ADMIN. |
| MarkView Admin User password |  | The password associated with the MarkView Admin User. |

## Create and configure schema users

The Database administrator runs a series of scripts to create database tablespaces and to assign privileges and grants to users who are installing MarkView. The scripts provided prompt the administrator for the information in the following table. If you are using the silent installer, see the installer\_interview.properties file field names below.

### Create tablespaces

The create\_tablespace.sql script prompts you for the information in this table.

| **Item** | **installer\_interview.properties File Field Name** | **Your Information** | **Description** |
| --- | --- | --- | --- |
| **MarkView Data Tablespace:** Use this information when you run create\_tablespace.sql to create the MarkView data tablespace. | | | |
| Tablespace Name | MarkViewDBConn.tablespace |  | The name of the data tablespace. For example, MVD. |
| Initial Size |  |  | The initial tablespace size in MB. |
| Max Size |  |  | The maximum tablespace size in MB. Use the default setting to make the tablespace size unlimited. |
| Full pathname of the location of the tablespace |  |  | The full path and filename where the MarkView schema will reside. |
| **MarkView Index Tablespace:** Use this information when you run create\_tablespace.sql to create the MarkView index tablespace. | | | |
| Tablespace Name | MarkViewDBConn.indexspace |  | The name of the index tablespace. For example, MVI. |
| Initial Size |  |  | The initial tablespace size in MB. |
| Max Size |  |  | The maximum tablespace size in MB. Use the default setting to make the tablespace size unlimited. |
| Full pathname of the location of the tablespace |  |  | The full path and filename where the MarkView schema will reside. |
| **Temporary Tablespace Name:** Use this information when you run alter\_user\_new\_tablespace.sql to edit the MarkView user or create new unlimited, dictionary-managed tablespaces. | | | |

### Create the MarkView Schema User

The create\_account.sql script prompts you for the information in this table.

| **Item** | **installer\_interview.properties File Field Name** | **Your information** | **Description** |
| --- | --- | --- | --- |
| **MarkView Schema User:** Use this information when you run create\_account.sql to create the MarkView schema user. | | | |
| Username | MarkViewDBConn.user |  | The username for the MarkView schema user. |
| Password | MarkViewDBConn.password |  | The password for the MarkView schema user. |
| Database data tablespace name | [MarkViewDBConn.tablespace](#MarkViewDBConntablespace) |  | The data tablespace name you created when you ran create\_tablespace.sql to create the data tablespace. (See [Data Table Space Name](#DataTableSpaceName).) |
| Index data tablespace name | [MarkViewDBConn.indexspace](#MarkViewDBConnindexspace) |  | The index tablespace name you created when you ran create\_tablespace.sql to create the index tablespace. (See [Index Table Space Name](#IndexTableSpaceName).) |
| Name of the temporary tablespace |  |  | The name of the temporary tablespace from [Temporary Tablespace Name](#TemporaryTablespaceName). |

# Installation application prompts

You need the following information to run the installation application. After running the first installer, most fields are pre-populated with your information when you run other installers.

## Common prompts

The following prompts appear when you run every installer. You do not have to complete all of the fields each time. Except for passwords, the information you supply is stored by the Target Registry Service. When the MarkView Verify tool or the MarkView Installer for Application Server and Database Components is run once, the Target Registry Service stores the information in the appropriate location for other installers.

Log in to the Application Server as the Operating System Administrator, or as a user with read/write privileges

| **Item** | **preliminary\_interview. properties File Field Name** | **Your information** | **Description** |
| --- | --- | --- | --- |
| **Verify Tool prompt: Which products do you want to verify for this environment?**  or **Installer prompt: Which products do you want to install?** | | | |
| List of Products *(varies based on the installer)* | SelectedProducts. selected\_products |  | The list of products is different for each installer.  If you are running an upgrade, the term *install* indicates that the latest version of the product is being installed.  The installer tool determines whether to run an upgrade or an installation for each product.  For Silent Installs, these must exactly match what appears in the install\_script.xml file. Separate product names with commas. For example:   * MarkView for AP 10.1.0 with Transformation * MarkView for Expense Management 10.1.0 * MarkView Document Library 10.1.0 |
| **Installation Type (not in Verify tool)** | | | |
| Standard Full Install  Partial Install | InstallationType.installation\_type |  | For a new installation or upgrade, use the Standard Full Install. Only use the Partial Install for installations where client components are installed in multiple locations and the database components should not be installed again. |
| **Select the Application Server** | | | |
| Application Server Type | AppServer.Type.app\_server\_type |  | Select the application server type (WebLogic, WildFly, or JBoss EAP).  For Silent Installs, use JBoss value for the WildFly application server or JBoss EAP, and WebLogic value for the Weblogic application server. |
| **Select the directory where you want to install MarkView** | | | |
| MarkView Installation Directory | InstallDirectory.install\_directory |  | The directory you entered in [MarkView Installation Directory](#MarkViewInstallationDirectory). The MarkView installation directory stores the install logs and the target\_registry\_service.properties file. The target\_registry\_service.properties file contains the TRS URL, the location where the values entered in response to Installer prompts and module version information is stored.  The MarkView installation directory must exist before you start the installer. The Target Registry Service must be installed and running. |
| **MarkView Target Registry Service URL** | | | |
| MarkView Target Registry Service URL |  |  | After you run the installer for the first time, the prompt for the MarkView Target Registry Service URL appears every time you run the installer.  The format is:  http://<j2ee\_appserver\_host.company.com>:<port\_#>/mvastrs/markview |

## MarkView schema connection information

If you are using the silent installer, see the installer\_interview.properties file field names.

| **Item** | **installer\_interview.properties File Field Name** | **Your information** | **Description** |
| --- | --- | --- | --- |
| Schema username | [MarkViewDBConn.user](#MarkViewDBConnuser) |  | The MarkView schema user name from Creating the MarkView Schema User. For example, markview. |
| Schema Password | [MarkViewDBConn.password](#MarkViewDBConnpassword) |  | The password for the MarkView schema user from Creating the MarkView Schema User. |
| Host | MarkViewDBConn.host |  | The fully qualified host name for the Oracle DBMS server where the MarkView schema was created. For example: dbserver.kofax.com. |
| Port | MarkViewDBConn.port |  | The port number for the TNS Listener for the Oracle DBMS. |
| SID | MarkViewDBConn.sid |  | The Oracle System Identifier (SID) that is used in the connect string to reference the database instance. For example: testDB. |
| Tablespace | [MarkViewDBConn.tablespace](#MarkViewDBConntablespace) |  | The name of the tablespace where the MarkView database objects are created for the MarkView database schema user. This is typically the default tablespace name you defined when you created the MarkView database schema user. (See Creating Tablespaces.) If you do not specify the default tablespace, when you create the MarkView database schema, you must confirm that the MarkView database schema user has privileges to use the specified tablespace. |
| Index space | [MarkViewDBConn.indexspace](#MarkViewDBConnindexspace) |  | The name of the tablespace where the MarkView database indexes are created. (See Creating Tablespaces.) You must confirm that the MarkView database schema user has privileges to use the specified tablespace. |
| Logging Directory | MarkViewDBConn.loggingDirectory |  | The database logging directory defined for the MarkView schema database by the database administrator. |

## Oracle E-Business Suite application information

|  |  |  |  |
| --- | --- | --- | --- |
| **Item** | **installer\_interview.properties File Field Name** | **Your information** | **Description** |
| Oracle E-Business Suite User | OracleEBS.user |  | The database username for the Oracle E-Business Suite schema. For example: apps. |
| Oracle E-Business Suite Password | OracleEBS.password |  | The database password for the Oracle E-Business Suite schema. |

## MarkView Verify tool and MarkView installer for application server and database components

If you are using the silent installer, see the installer\_interview.properties file field names.

| **Item** | **installer\_interview.properties File Field Name** | **Your information** | **Description** |
| --- | --- | --- | --- |
| **Enter information for Oracle Text (only for the MarkView Document Library)** | | | |
| CTXSYS Password |  |  | From [CTX SYS account](#CTXSYSaccount). |
| **Select the directory where the document server will store files (for ALL installs – not in Verify Tool)** | | | |
| Folder location  (Document Server Directory) | FolderLocation.location |  | The root directory where the MarkView Document Server stores documents. The OS user who runs the application server must have access to read and write to this directory. For example: $HOME/markview/docserver. |
| **Enter the Mail Server information (for ALL installs – not in Verify Tool)** | | | |
| SMTP Server Address | SMTPInfo.serverName |  | The fully qualified name of the SMTP host. For example, smtphost.company.com. |
| Account Name/Password (optional) | SMTPInfo.username  and  SMTPInfo.password |  | The credentials used to send email from the SMTP server. If outgoing email does not require authentication, leave these fields blank. If outgoing mail messages require authentication, specify the email account credentials required to send notification emails from MarkView applications. |

## WebLogic application server information for MarkView

If you are using the silent installer, see the installer\_interview.properties file field names.

| **Item** | **installer\_interview.properties File Field Name** | **Your information** | **Description** |
| --- | --- | --- | --- |
| Admin Username | WebLogicAppServer. adminUserName |  | The WebLogic admin user configured for MarkView. |
| Admin User password | WebLogicAppServer. adminPassword |  | The WebLogic admin user's password. |
| Domain Name | WebLogicAppServer. domainName |  | The WL domain (defaults to MarkView). |
| Domain Directory | WebLogicAppServer. domainLocation |  | The location of the domain installation (defaults to $WL\_HOME/../markview). |
| Host Name | WebLogicAppServer.host |  | The fully qualified name for the Application Server. For example: weblogic.kofax.com. |
| Admin Port | WebLogicAppServer.adminPort |  | The admin HTTP port (default 7001). |
| SSL | WebLogicAppServer.asSSL |  | For SSL on the WebLogic server, set the value to true.  Set the value to false if you do not use SSL. |
| HTTP Port | WebLogicAppServer.port |  | The HTTP port where the installed applications will listen (default 8001). |
| NodeManager Port | WebLogicAppServer. nodeManagerPort |  | The Node Manager port number (for example, 5556). |
| weblogic.jar Location | WebLogicAppServer.jarLocation |  | Points to the weblogic.jar file (defaults to $WL\_HOME/server/lib/weblogic.jar). |
| Java Home Directory | WebLogicAppServer. javaHomeDir |  | Defaults to %WL\_HOME/../jrockit\_\* |

## WildFly and JBoss EAP application servers information for MarkView

If you are using the silent installer, see the installer\_interview.properties file field names.

| **Item** | **installer\_interview.properties File Field Name** | **Your information** | **Description** |
| --- | --- | --- | --- |
| Admin Username | JBossAppServer. adminUserName |  | The WildFly or JBoss EAP admin user configured for MarkView. |
| Admin User password | JBossAppServer. adminPassword |  | The WildFly or JBoss EAP admin user's password. |
| Domain mode | JBossAppServer.domain |  | For domain mode, enter your domain name  as follows:  JBossAppServer.domain=<domainName>  For standalone mode, leave the field value  blank:  JBossAppServer.domain= |
| WildFly Directory | JBossAppServer. domainLocation |  | The location of the domain installation (defaults to <distribution\_directory>/../wildfly). |
| Host Name | JBossAppServer.host |  | The fully qualified name for the Application Server. For example: wildfly.kofax.com. |
| Admin Port | JBossAppServer.adminPort |  | The admin HTTP port (default 9090). |
| SSL | JBossAppServer.asSSL |  | For SSL on the WildFly or JBoss EAP servers, set the value to true.  Set the value to false if you do not use SSL. |
| HTTP Port | JBossAppServer.port |  | The HTTP port where the installed applications will listen (default 26000). |
| Install WildFly | JBossAppServer.needsDeploy |  | The option to install and configure WildFly as part of the MarkView installation process. |

## MarkView installer for Oracle Objects

The MarkView Oracle Objects are installed from the host where Oracle E-Business Suite is installed. The information in this table is required to complete the procedures in the *MarkView Installation Guide* orthe *MarkView Upgrade Guide,* “Installing MarkView Oracle Objects” chapter. Use this table with the instructions in the guide. Installing the MarkView Oracle Objects requires the information in the [Common Installer Prompts](#_Common_Installer_Prompts) section as well as the information in this section.

| **Item** | **installer\_interview.properties File Field Name** | **Your information** | **Description** |
| --- | --- | --- | --- |
| **Oracle E-Business Suite Host Information** | | | |
| Oracle EBS Host name |  |  | The server on which Oracle E-Business Suite forms server is installed. |
| Oracle EBS Administrator user account | OracleEBS.user |  | The administrator account under which Oracle EBS was installed. For example, applmgr. |
| Oracle EBS Administrator password | OracleEBS.password |  | The password for the Oracle EBS administrator. |
| MarkView Installation Directory | [InstallDirectory.install\_directory](#InstallDirectoryinstalldirectory) |  | The directory you entered in [MarkView Installation Directory](#MarkViewInstallationDirectory). The MarkView installation directory stores the install logs and the target\_registry\_service.properties file. The target\_registry\_service.properties file contains the TRS URL, the location where the values entered in response to Installer prompts and module version information is stored.  The MarkView installation directory must exist before you start the installer. The Target Registry Service must be installed and running. |
| **Oracle E-Business Suite Environment Details** | | | |
| The value of $APPL\_TOP |  |  | The installer finds and displays the value for verification. |
| The value of $COMMON\_TOP |  |  | The installer finds and displays the value for verification. |
| Version of Oracle EBS |  |  | The version of Oracle EBS that is running. |
| Forms Mode: Servlet or Socket |  |  | See the *MarkView Installation Guide* orthe *MarkView Upgrade Guide,* “Install MarkView Oracle Objects” chapter for more information. |
| The value of $c\_MARKVIEW\_TOP |  |  | See the *MarkView Installation Guide* orthe *MarkView Upgrade Guide,* “Install MarkView Oracle Objects” chapter for more information. |

## MarkView installer for Capture and Output components

The MarkView Capture and Output Components are installed from multiple hosts. See the *Planning* Guide for more information about where the products are to be installed. The information in this table is required to complete the procedures in the *MarkView Installation Guide* orthe *MarkView Upgrade Guide*, ”Install and configure MarkView Capture and Output components.” This table is intended to be used in conjunction with the instructions in the guide, and you will find more details there. Installing the MarkView Capture and Output Components will require the information in the [Common Installer Prompts](#_Common_Installer_Prompts) section as well as this section.

If multiple MarkView Capture and Output products are going to be installed on the same host, they can be installed at the same time.

#### Install MarkView Windows Services

The MarkView Windows Services include MarkView Document containing:

* MarkView Mail Gateway Server
* MarkView Bar Code Server

| **Item** | **Your Information** | **Description** |
| --- | --- | --- |
| OS username |  | The username for an operating system user with privileges to install MarkView software and drivers. |
| OS Password |  | Password for the operating system user who installs MarkView software and drivers. |
| MarkView Install Directory |  | The directory you entered in [MarkView Installation Directory](#MarkViewInstallationDirectory). The MarkView installation directory stores the install logs and the target\_registry\_service.properties file. The target\_registry\_service.properties file contains the TRS URL, the location where the values entered in response to Installer prompts and module version information is stored.  The MarkView installation directory must exist before you start the installer. The Target Registry Service must be installed and running. |
| Name of the Mail Gateway and Bar Code Server host |  | The name of the host where the MarkView Mail Gateway Server and Bar Code Server will be installed. |
| OS username |  | The username for an operating system user with privileges to install MarkView software and drivers. |
| OS Password |  | Password for the operating system user who installs MarkView software and drivers. |

#### Configure Data Export Server (for Kofax Transformation Modules installs)

|  |  |  |
| --- | --- | --- |
| **Item** | **Your Information** | **Description** |
| TNS entry for MarkView Database instance |  | When prompted for **Database Host,** enter the TNS alias name that was configured in the TNS names file (such as tnsnames.ora) for the database instance of the MarkView schema. |

#### Configure Bar Code Server

|  |  |  |
| --- | --- | --- |
| **Item** | **Your Information** | **Description** |
| TNS entry for MarkView Database instance |  | When prompted for **Database Host,** enter the TNS alias name that was configured in the TNS names file (such as tnsnames.ora) for the database instance of the MarkView schema. |

#### Configure Mail Gateway Server

|  |  |  |
| --- | --- | --- |
| **Item** | **Your Information** | **Description** |
| TNS entry for MarkView Database instance |  | When prompted for **Database Host,** enter the TNS alias name that was configured in the TNS names file (such as tnsnames.ora) for the database instance of the MarkView schema. |