IBM FileNet Image Services
Version 4.2

Multi-Committal and Cross-Committal Configuration Handbook

SC19-3313-00

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Note
Before using this information and the product it supports, read the information in "Notices" on page 111.

This edition applies to version 4.2 of IBM FileNet Image Services (product number 5724-R95) and to all subsequent releases and modifications until otherwise indicated in new editions.

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About this manual

Related documents

The following documents provide additional information about your IBM® FileNet® Image Services system.

- *System Administrator's Handbook*
- *System Administrator's Companion for UNIX*
- *System Administrator's Companion for Windows Server*
- *System Tools Reference Manual*

To download these documents from the IBM support page, see **"Accessing IBM FileNet documentation" on page 10**.

Document revision history

FileNet Image Services version	Date	Comment
4.2	May 2011	Initial release.

IBM FileNet education

IBM provides various forms of education. Please visit the IBM Information Management support page at (**www.ibm.com/software/data/support**).

Accessing IBM FileNet documentation

To access documentation for IBM FileNet Image Services products:

1. On the **www.ibm.com** website, enter “Image Services Documentation” in the search box on the menu bar.
2. Select **IBM - Product Documentation for FileNet Image Services** from the list of search results.

Feedback

We value your opinion, experience, and use of our products. Please help us improve our products by providing feedback or by completing a consumability survey.

Documentation feedback

Send comments on this publication or other IBM FileNet Image Services documentation by e-mail to **comments@us.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, include the location of the text (for example, a help topic title, a chapter and section title, a table number, or a page number).

Product consumability feedback

Help us identify product enhancements by taking a Consumability Survey (**http://www-306.ibm.com/software/data/info/consumability-survey/**). The results of this comprehensive survey are used by product development teams when planning future releases. Although we are especially interested in survey responses regarding

the most recent product releases, we welcome your feedback on any of our products.

The survey will take approximately 30 minutes to complete and must be completed in a single session; there is no option to save a partially completed response.

1 Conceptual overview

This chapter provides an overview of cross-committal and multi-committal FileNet Image Services systems. It illustrates some sample configurations and refers you to other manuals or sections in this manual for more detailed descriptions and procedures.

For details, see the following topics:

- **“Cross-committal system overview” on page 13**
- **“Multi-committal system overview” on page 18**
- **“Where to find more information” on page 25**

Cross-committal system overview

Cross-committal provides a method of committing documents to a different FileNet Image Services system than the system on which the Batch Entry Services (BES) system resides. Unlike a multi-committal configuration, a cross-committal system can commit to only one FileNet Image Services system — its target. You can schedule cross-committals to run during off-peak hours. For more information on this feature, see **Chapter 4, "Scheduling system committals," on page 107**.

Important To use the Cross-Committal System or the Multi-Committal System feature, you must ensure that the version of the FileNet Image Services software on the source system is an earlier version or the same version as the FileNet Image Services software on the target system.

Important You cannot use a cross-committal configuration to commit COLD documents to a target system. For COLD documents, you must use a multi-committal configuration.

Document committal sequence

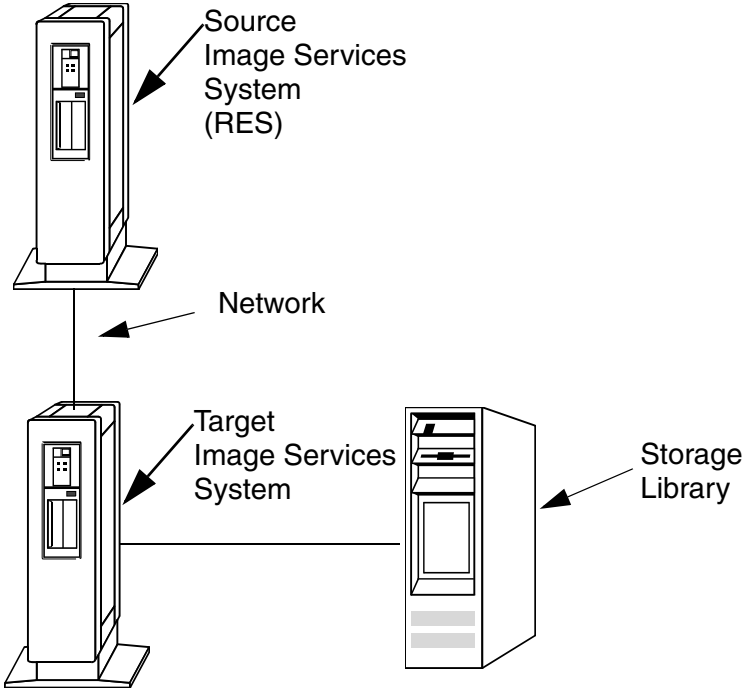
In a cross-committal configuration, documents are processed by the BES system and committed on the target system. There is no committal on the local (source) system. A committal is initiated on the target system.

Important If the BES system fails to communicate with the target FileNet Image Services system (for example, when the network fails or the target system is down for maintenance), the BES periodically retries the committal process until it re-establishes communication.

The sequence of events on the target system is as follows:

- The document is migrated to tranlog. This migration must complete before continuing to the next step.
- The document is migrated to primary.

The following shows a cross-committal configuration where the source system is configured as a Remote Entry System (RES). The RES is used for scanning and indexing documents to be committed on the target FileNet Image Services system.



Cross-committal Configuration

Configuring a cross-committal system

The following is a high level overview of the tasks you must accomplish when creating a cross-committal system. Detailed steps follow in chapter 2, **"Configuring cross-committal systems" on page 26**.

Add peers to source and target systems

Use **fn_edit** on both the source system and the target system to do the following:

- Add a peer system to both the source and target systems. The source system will peer to the target and the target system will peer to the source. The source system must recognize the target as a peer in order to commit to the peer.
- Ensure the systems are compatible: the document ID ranges on both systems must not overlap.
- Turn on Fast Batch Committal.
- Cataloging is not required on the source system.

Ensure matching names and passwords

Use the **Xapex (or Application Executive), Security Administration** to ensure compatible security parameters as follows:

- Ensure that the source and target systems have matching names and passwords. Use the **Users** menu option **Add Users** on both source and target systems to create matching user accounts to give the user access to both source and target systems. For example:

System A Security Objects	System B Security Objects
user1:SystemA	user1:SystemA
user1:SystemB	user1:SystemB

- Set up identical group names on source and target systems. Although the users in the groups can differ, make sure the read/write/append access group name is present on both systems.

Ensure matching indexes, family names, and classes

Use the **Xapex Database Maintenance** program to do the following:

- Set up any required indexes to match on both source and target systems.
- Define family names to match **exactly** on the source and target systems. Select the family media type for the target system.

Important Although the family names must match, you can select different **media types** for the source and target system.

- Ensure that document class names match on both source and target systems.
- Ensure that the read/write/append access group name is present on both source and target systems; however, document class security and users in the group do not have to match.
- Define access rights for committed documents on the source system.

- Define retention base for committed documents on the target system.

As an alternative, follow the steps above only on the source system, then use the **ddexim** tool to export the data dictionary from the source system, and import the file on the target system. (See the *FileNet Image Services System Administrator's Handbook* for more information on the ddexim command). To download this handbook from the IBM support page, see **"Accessing IBM FileNet documentation" on page 10**.

Multi-committal system overview

A multi-committal configuration provides a way to commit copies of documents to more than one system. This may serve as an alternative backup to be used for disaster recovery or as a central repository.

Completing document committal on the source system triggers committal on the target system. Multi-committal systems use fast-batch committal to commit documents to target systems. The fast-batch objects remain in cache on the source system until they have completed committal on all of the target systems.

Important To use the Cross-Committal System or the Multi-Committal System feature, you must ensure that the version of the FileNet Image Services software on the source system is an earlier version or the same version as the FileNet Image Services software on the target system.

Tip A multi-committal configuration is more efficient when documents are committed to the source system using fast-batch committal.

Multi-committal document committal sequence

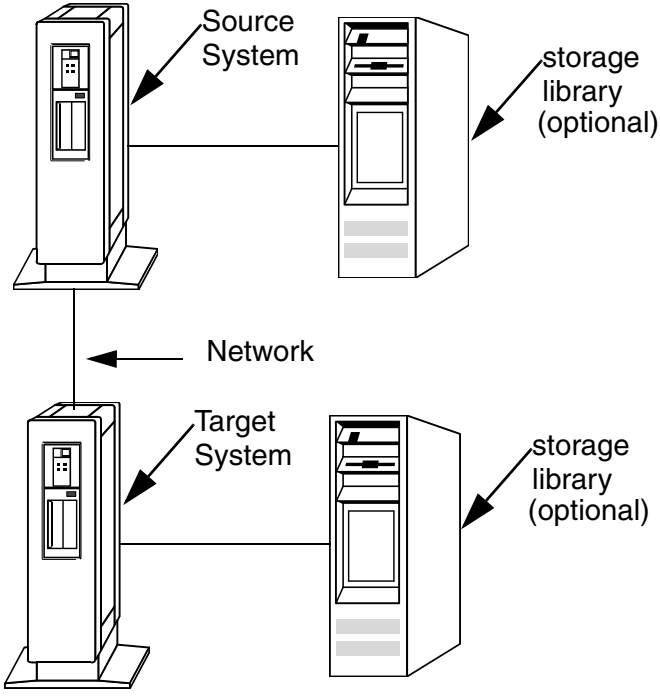
In a multi-committal configuration, the document committal sequence is as follows:

- The document is migrated to the local system first. Local disk writes need to complete before the system can release a document to the target system. If local OSAR is not available, batches/documents will remain in local caches until the writes to the local optical is completed. After the local migration is complete, the document is migrated to each of the targets in turn.
- In the local system, if a tranlog is required, a migration is initiated and must complete on the tranlog first. Then the document is migrated to primary.
- In each of the target systems, if a tranlog is required, a migration is initiated and must complete on the tranlog first. Then the document is migrated to primary.

Important If a particular target system is down and document committal fails, the system keeps retrying the committal process to the target system where the failure occurred.

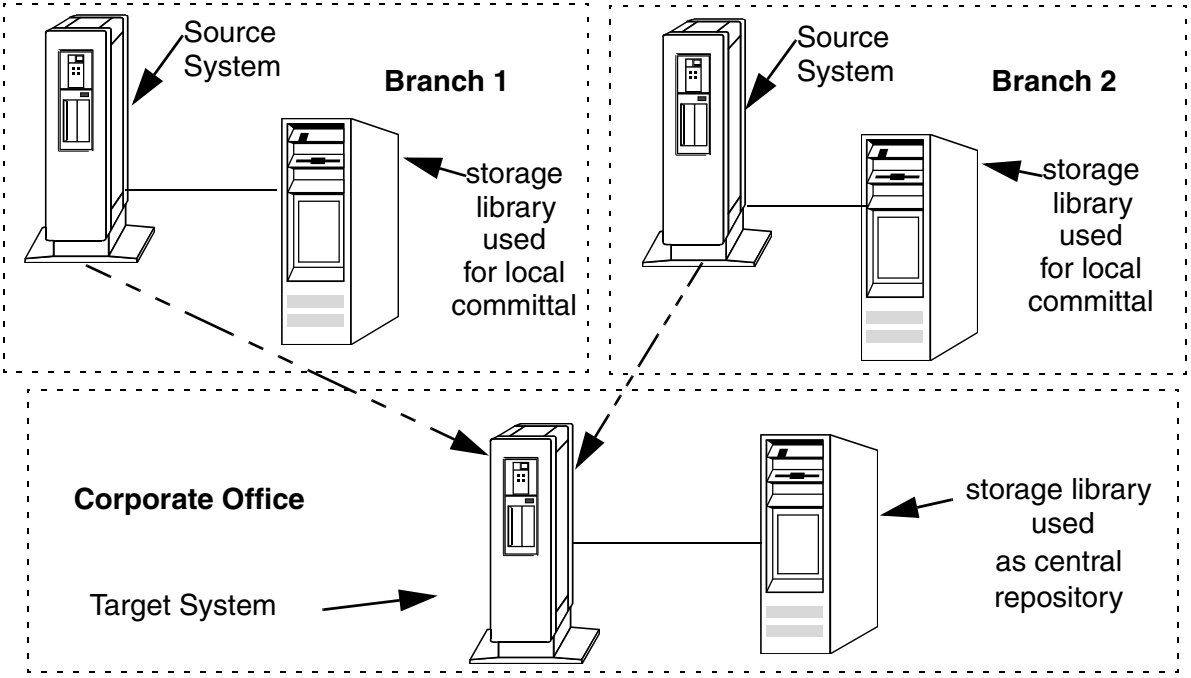
Attention Post-committal changes to a document index or annotations on one server does not automatically update the documents previously committed to another server. If you make post-committal changes on either the source or target systems and you require replication of document index or annotations, you must duplicate those changes on documents committed to the other servers in the multi-committal chain. For assistance, contact your service representative.

The following illustration shows a single-source FileNet Image Services multi-committal configuration. The source system is used for scanning and indexing documents which are then committed to the local storage library. After the committal completes on the source system, it automatically commits the documents to the target system.



Single-Source Multiple-System Committal Configuration

The following illustration shows a dual-source FileNet Image Services multicommittal configuration. A financial organization might use this type of configuration where they scan, index, and commit documents on FileNet Image Services servers at more than one branch, and require copies of those documents at their corporate office. After committing the documents on the branch system, the source (branch) system repeats the committal on the target FileNet Image Services system, based at corporate headquarters. This enables the organization to retain backup documents in a central location, which could be used for disaster recovery.



Dual-Source Multiple-System Committal to a Single Target System

Configuring a multi-committal system

The following is a high level overview of the tasks you must accomplish when creating a multi-committal system. For detailed steps see **Chapter 3, "Configuring multi-committal systems," on page 67**.

Add peers to source and target systems

Use **fn_edit** on both the source system and the target system to do the following:

- Add a peer system to both the source and target systems. The source system will peer to the target and the target system will peer to the source. The source system must recognize the target as a peer in order to commit to the peer.
- Depending on your system, you may want to set up the document ID ranges on both systems so that they do not overlap.

Tip Although having non-overlapping document IDs is recommended for organizational purposes, this is not *required* for multi-committal systems.

Ensure matching names and passwords

Use the **Xapex (or Application Executive) Security Administration** program to ensure that the **User** and **Security** settings for a user are identical on both the source and target systems:

- Ensure that the source and target systems have matching names and passwords. Use the **Users** menu option **Add Users** on both source and target systems to create matching user accounts to

give the user access to both source and target systems. For example:

System A Security Objects	System B Security Objects
user1:SystemA	user1:SystemA
user1:SystemB	user1:SystemB

- Set up identical group names on source and target systems. Although the users in the groups can differ, make sure the read/write/append access group name is present on both systems.

Ensure matching indexes, family names, and classes

Use the **Xapex Database Maintenance** program to complete the steps in this section. Refer to the *FileNet Image Services System Administrator's Handbook* for more information. To download this handbook rom the IBM support page, see **"Accessing IBM FileNet documentation" on page 10**.

Tip For organizational purposes, you may want to match doc classes and indexes on both the source and target systems. Family names and media types do not need to match.

- Set up any required indexes to match on both source and target systems.
- Define optical disk sizes, or family names, as configured on each system.
- Ensure that document class names match on both source and target systems.

- Ensure that read/write/append access group name is present on both source and target systems; however, document class security and users in the group do not have to match.
- Define access rights for committed documents on the source system.
- Define retention base for committed documents on the target system.
- (Optional) As an alternative, follow the steps above only on the source system, then use the **ddexim** tool to export the data dictionary from the source system, and import the file on the target system. (For details on the ddexim command, refer to the *FileNet Image Services System Administrator's Handbook*.) To download this handbook from the IBM support page, see **"Accessing IBM FileNet documentation" on page 10**.

Source system only

To verify proper family configuration, follow these steps on the source system only:

- After you create an account as described in **"Ensure matching names and passwords" on page 16**, log into Xapex.
- Open the Database Maintenance application and select Define/Update Family from the Families menu.
- Select the Families option from the Remote menu and select the target domain from the Domains drop-down list.
- Select the family you created in **"Ensure matching indexes, family names, and classes" on page 17** from the Families drop-down list.

Important Configuring systems for multiple system committal requires linking the primary disk family on the source system with one or more primary families on target systems. Either target or source systems can point to multiple families, as long as they do not point back to each other, which would result in a loop, causing committals to attempt to repeat indefinitely.

Where to find more information

See the *FileNet Image Services System Administrator's Handbook* for more information on the following subjects:

- The fn_edit on-line help system and configuration details provided in the installation guide for your FileNet Image Services system for system configuration procedures.
- Security for Internetworking for details on setting up user accounts for cross- and multiple-system committals.
- ddexim for details on exporting a data dictionary on one system and importing the file on another system.

To download this handbook from the IBM support page, see **"Accessing IBM FileNet documentation" on page 10**.

2

Configuring cross-committal systems

A cross-committal System is composed of a **source** FileNet Image Services system and a **target** FileNet Image Services system. The source system commits images to the target system, but does not retain the images locally.

A Remote Entry Server (RES) is a specific type of Cross-Committal system that has no storage library and is used only for entering images for committal to another independent system (the target) that does have a storage library. The target system is also capable of entering and committing images, so in this situation the two systems must be “compatible,” that is, they must have non-overlapping document IDs and surface IDs.

Since an RES uses Batch Services to commit to the target system, you must use a product that commits using Batch Services so that the images are not retained locally after committal. For example, FileNet Capture uses Batch Services to commit while FileNet IDM Desktop uses Document Services to commit, so Capture should be used instead of IDM Desktop on an RES.

Cross-committal checklist

You will configure various aspects of your source and target systems depending on what you enter in this worksheet. The configuration steps will follow the checklist.

Tip You may need to access your source and target systems in order to fill out the checklist.

System domain names

A cross-committal system will have two peer domains. One is the **source** system (no resident storage library) and one is the **target** system (storage library is present). Enter their names in the following table.

	Source System	Target System
Domain Name	_____	_____
Organization Name (if different)	_____	_____

Document ID numbers

The most important input in building a cross-committal system is maintaining system compatibility. This means that document ID numbers on the two systems can't overlap each other. Otherwise, errors will generate and documents won't commit.

Enter the document ID ranges in the following table. Note that the total range is 100,000 to 3,999,999,999. (The numbers entered below are sample values.)

	Starting Doc ID	Ending Doc ID
Source System	100,000	1,000,000
Target System	1,000,001	1,000,000,000

User accounts

The FileNet Image Services user account name(s) that do the committing on the source system must match user names on the target system. The users must belong to the same primary group. The user account passwords must match on both systems as well.

User account name: _____

User account password: _____

User account primary group: _____

User account currently exists on source system: Yes No

User account currently exists on target system: Yes No

If yes to both questions, is the password for both accounts identical?

Yes No

User account is a member of the same primary group on both systems:

Yes No

Document classes

The document class must match on both the source and target systems.

Document class name for both source and target: _____

Document class security _____

Document class exists on both source and target: Yes No

Document classes both contain the same indexes: Yes No

Indexes used by document class match exactly: Yes No

If yes, disposition is the same on both systems: Yes No

Tip Document class security does not have to match on source and target.

Optical disk families

The optical disk family names must match for both the source and target systems.

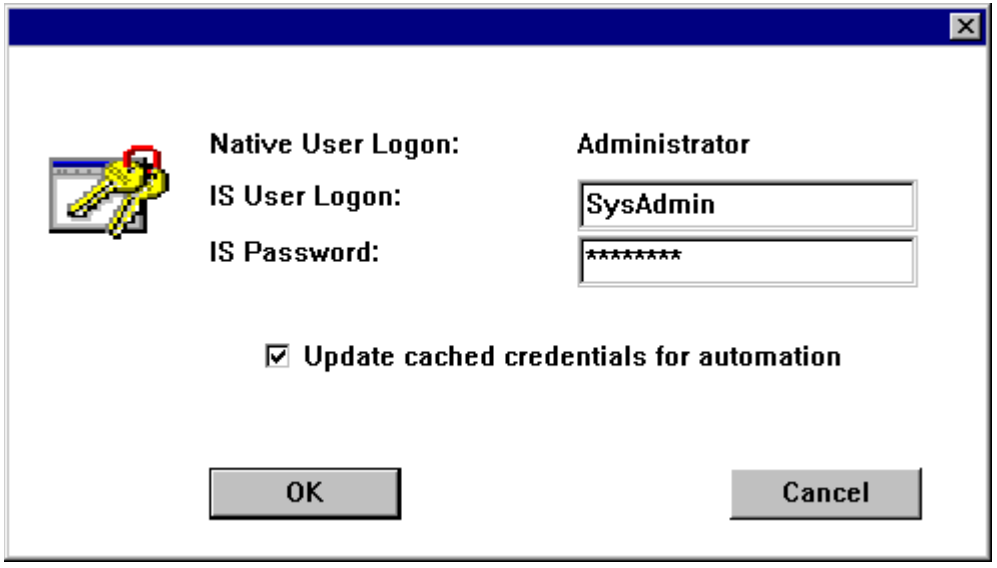
Optical disk family name for source and target: _____

Optical disk family exists on both source and target: Yes No

For Windows Servers only

WIN Every Windows server in a cross-committal configuration must have the Cached Credentials options selected.

1. Start Xapex.
2. In the login dialog box, select Update cached credentials for automation, and Click **OK**.



Configure cross-committal systems

As you complete the following subsections, be sure to distinguish between the **source** system for document entry and the **target** system for document committal.

Update the host file on the source system

The host file is typically located in the C:\Windows directory and contains information that allows the source server to locate a target server. The information in the host file includes the IP address, the server name, and the four-part NCH name. Locate and open the host file in a text editor. Add the host information for each target server in the cross-committal system.

Cross-committal peers

There are two types of Peers:

The **Compatible Peer** configuration contains remote system SSN and requires that the doc_id number ranges **not** overlap.

The **Non-Compatible Peer** configuration DOES NOT contain system SSN and allows the doc_id ranges to overlap.

Cross-committal configurations must be made up of compatible peers where the doc_id ranges do not overlap.

Add peer to source system

Each of the FileNet systems in a cross-committal or a multi-committal configuration is an independent system with a Root/Index server. For this reason, each system is considered a **peer system** by all the others.

Important Cross-committal configurations must be made up of compatible peers where the doc_id ranges do not overlap. See **"Cross-committal peers" on page 31** for more information.

These procedures will differentiate between the peers by referring to **source** and **target** systems.

Server types Perform the steps in this section on the root server of the **source** system.

Important The system serial number (ssn) of each peer system is listed in the as_conf.g file on the Root server. You will use the ssn in the Configuration Editor to add additional peer systems.

1. Go to an X-station, a workstation that supports X Windows or Common Desktop Environment (CDE), or a PC with an X Windows emulator and login to your **source** system as **fnsw** user. Start X Windows.
2. As **fnsw** user, run **fn_edit** by entering:

   fn_edit &

   The Open Configuration Database dialog box displays.
3. Verify that the two-part domain information is correct and click **OK**. The System Configuration Editor window displays.
4. Click on the Procedures tab in the System Configuration Editor window.
5. Select the Add a Peer System from the Procedure List Box, then click Run.
6. Enter the domain name of the Peer server, for example, **target**.

Tip If the organization name of the target Peer server is different from the organization name of the source Peer server, enter both the domain name and the orgainization name. For example, **target:YourCorp**.

7. Enter the ssn of the target Peer server.
8. Enter the network address of the target Peer server.

Set document number ranges on the source system

9 Select the System Application Services tab.

10 Select the Document Services tab.

11 Enter the appropriate amounts for the Document Number (high value) and Document Number (low value) for both the source server and the target server. Refer to the numbers you entered in the checklist. THE NUMBERS ON THE SOURCE AND TARGET CAN NOT OVERLAP.

Verify/configure batch entry services on the source system

1 Select the Server Application Services tab. (Click the **Server Application Services** tab.)

2 Select the Batch tab.(Click the **Batch** tab.)

3 You will see a box entitled **Target IS Domain Name**. Click the down arrow icon in the box.

4 Select the domain name of the target system from the list box. (In the **Target IS Domain List**, click the target system you want.) Your selection determines the system where the batches will be committed.

You should select only compatible systems as peer systems. Compatible systems must have no overlapping document IDs or disk IDs.

5 Under the Batch tab, click on Fast Batch Committal. (On the **Batch** tab, select the **Fast Batch Committal** option.) Make sure it is set to **Yes** (✓).

6 Click the System Applications Services tab. Click the Others subtab.(On the **System Applications Services** tab, click the **Others** tab.) Make sure Cataloging Enabled is set to **No** (an 'X' mark). (Select the **Cataloging Enabled** option. Make sure it is set to **X.**)

7 Click on the Performance Tuning tab in the System Configuration Editor window. (Click the **Performance Tuning** tab.)

8 Click on Server Processes. (Click the **Server Processes** tab.)

9 Click on the arrow button to increase or decrease the number of bes_ commit processes. (In the **BES Commit Process Count** column, type or select the number of commit processes you want.)

10 From the System Configuration Editor window, Click on the File pull down menu and click on the Exit option.(On the **File** menu, click **Exit**.)

11 You will then be asked if you want to save the changes you have just made to the current configuration database before you exit. Click on the **Yes** button to save the configuration and exit the System Configuration Editor.

12 Put the changes into effect by restarting FileNet Image Services. Enter the following at the command line:

initfnsw -y restart

13 Logout of the source system.

Add peer to target system

The procedures for target system mirror the procedures you followed for the source system with one exception: the target system will be committing to itself.

Server types

Perform the steps in this section on the root server of the **target** system.

Important

The system serial number (ssn) of each peer system is listed in the as_conf.g file on the Root server. You will use the ssn in the Configuration Editor to add additional peer systems.

1. Go to an X-station, a workstation that supports X Windows or Common Desktop Environment (CDE), or a PC with an X Windows emulator and login to your **target** server as **fnsw** user. Start X Windows.
2. As **fnsw** user, run **fn_edit** by entering:

   fn_edit &

   The Open Configuration Database dialog box displays.
3. Verify that the two-part domain information is correct for your target server and click **OK**. The System Configuration Editor window displays.
4. Click on the Procedures tab in the System Configuration Editor window.
5. Select the Add a Peer System from the Procedure List Box, then click **Run**.

6 Enter the domain name of the Peer (source) server, for example, **source**.

Tip If the organization name of the source Peer server is different from the organization name of the target Peer server, enter both the domain name and the orgainization name. For example, **source:YourCorp**.

7 Enter the ssn of the source Peer server.

8 Enter the network address of the Peer server.

Set Document Number Ranges on the Target System

9 Select the System Application Services tab.

10 Select the Document Services tab. You should see the source and target server names displayed.

11 Enter the appropriate amounts for the Document Number (high value) and Document Number (low value) for both the source server and the target server.

Attention These numbers should NOT match what you entered earlier on the source server. These numbers can not overlap.

Verify/configure batch entry services on the target system

1 Select the Server Application Services tab.

2 Select the Batch tab.

3 You will see a box entitled **Target IS Domain Name**. Check to see if the target system name is visible, if not, click the down arrow icon in the box.

4 Select the domain name of the **target** system from the list box. It is likely the default selection. Your selection determines the system where the batches will be committed.

Important At this step, the target server is configured to commit to itself.

5 Under the Batch tab, click on Fast Batch Committal. Toggle **Yes** (check mark). Set Fast Batch Committal to **Yes** for multi-committal systems.

6 Click the System Applications Services Tab. Click the Others subtab. Make sure Cataloging Enabled is set to **Yes** (a check mark).

7 Click on the Performance Tuning tab in the System Configuration Editor window.

8 Click on Server Process.

9 Click on the arrow button to increase or decrease the number of bes_ commit processes.

10 From the System Configuration Editor window, Click on the File pull down menu and click on the Exit option.

11 You will then be asked if you want to save the changes you have just made to the current configuration database before you exit. Click **Yes** to save the configuration and exit the System Configuration Editor.

12 Put the changes into effect by restarting the server by entering the following at the command line:

initfnsw -y restart

13 Logout of the target system.

Verify/configure user IDs and passwords on the source server

You must create User IDs and passwords that match on the source and target servers. If the User IDs, groups or passwords do not match, the cross-committal process will not work correctly.

Server types

Perform the steps in this section on the root server of the **source** system

1 Go to an X-station, a workstation that supports X Windows or Common Desktop Environment (CDE), or a PC with an X Windows emulator and login to the **source** system as **fnsw** user. Start X Windows.

2 Run Application executive by entering the following at the system prompt:

Xapex &

3 Log on to Xapex as **SysAdmin**.

For complete instructions on using Xapex refer to the *FileNet Image Services System Administrator's Handbook*. To download this handbook from the IBM support page, see **"Accessing IBM FileNet documentation" on page 10**.

4 Click the Applications pull-down menu from the Applications Executive screen. Select Security Administration. You will be creating a set of user/group objects that appear similar to those in the following table:

Security objects on the source server	Security objects on the target server
tom:target:FileNet	tom:source:FileNet
tom:source:FileNet	tom:target:FileNet
tomgroup:source:FileNet	

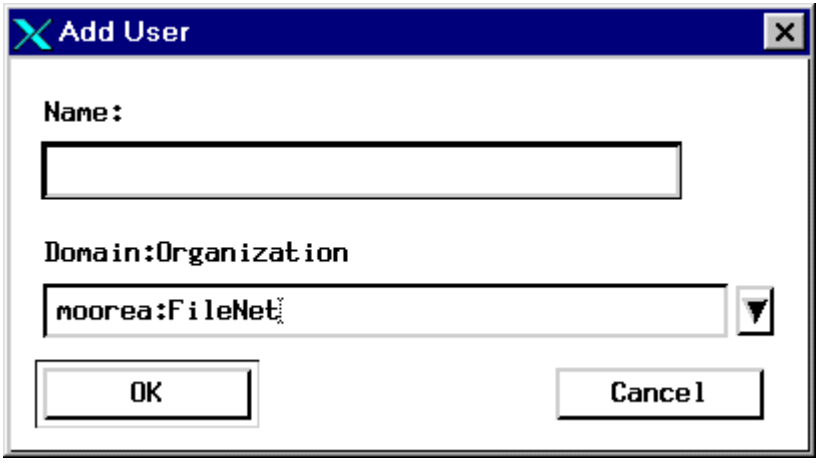
Attention The following steps assume that you **don't** have existing users and groups allocated for cross-committal usage. Please refer to the **"Cross-committal checklist" on page 26** to determine your required tasks.

If you wish to use existing security objects, you must ensure that there are identical security objects on both the source and target server.

Add user to the source system

5 From the Users pulldown menu, select Add User.

6 The Add User window appears. It should display the source system's domain in the Domain:Organization field.



7 If the source system is **not** indicated in the Domain:Organization field, use the down arrow button to select the source system's Domain:Organization.

8 Enter the name of the user you wish to add for the source server in the Name field. Click the OK button.

9 At the next Add User window, enter the additional required information. You must, at very least, enter password information by clicking the Password button. Click the OK button to accept the new user. Click OK when you receive the confirmation that the user was added successfully.

10 At this point, you should be back in the Security Administration menu. You will now add the same user for the target system.

Add identical user to the target system

11 From the Users pulldown menu, select Add User.

12 The Add User window has a field for the Domain:Organization with a default value of the source system's domain. Use the down arrow button to select the **target** system Domain:Organization.

Important If you don't see the target system listed at this point, it is because the target system was not successfully added earlier. Please re-check your steps at **"Add peer to source system" on page 31**.

13 Enter the same user name you entered earlier. Click the OK button.

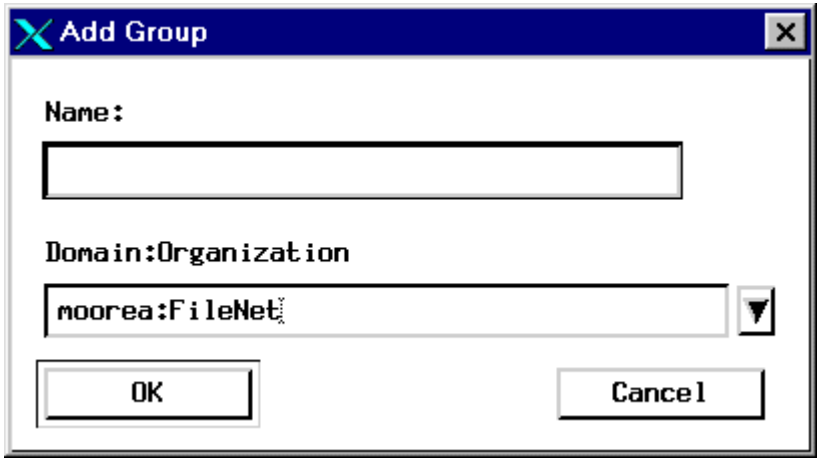
14 At the next Add User window, enter the additional required information. Click the Password button and enter the same password as you did earlier. Click the required OK buttons to accept the password and the new user. Click OK when you receive the confirmation that the user was added successfully.

15 At this point, you should be back in the Security Administration menu. You will now add a group for the source system.

Add group to the source system

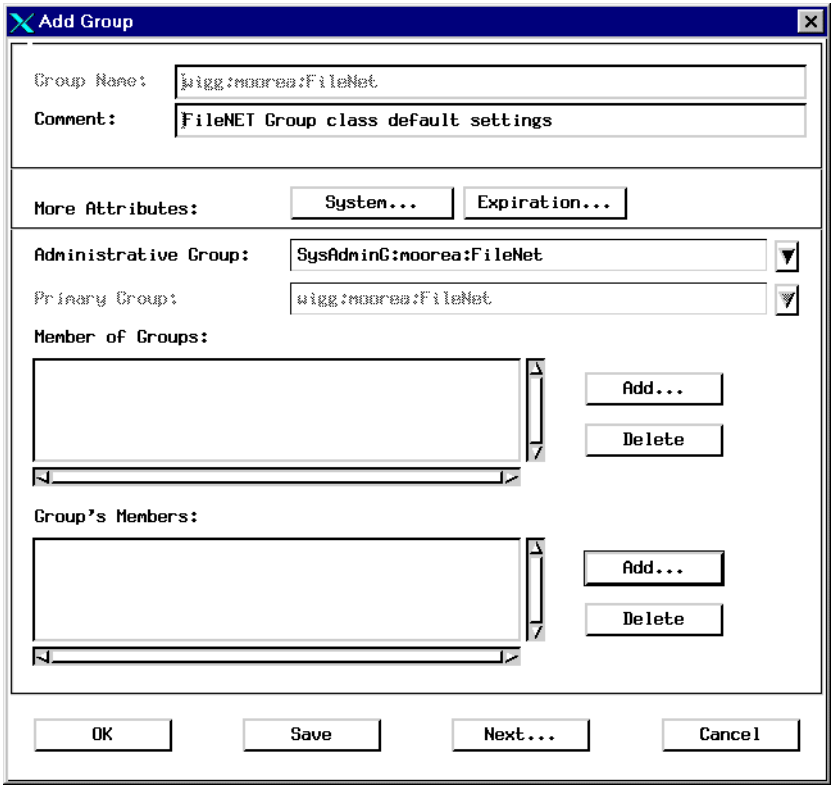
16 From the Security Administration menu, Select the Groups pull-down menu. Click Add Group. The Add Group window appears. It should

display the source system in the Domain:Organization.



17 Enter the name of the administrative group to which the cross-committal user will belong. Click **OK**.

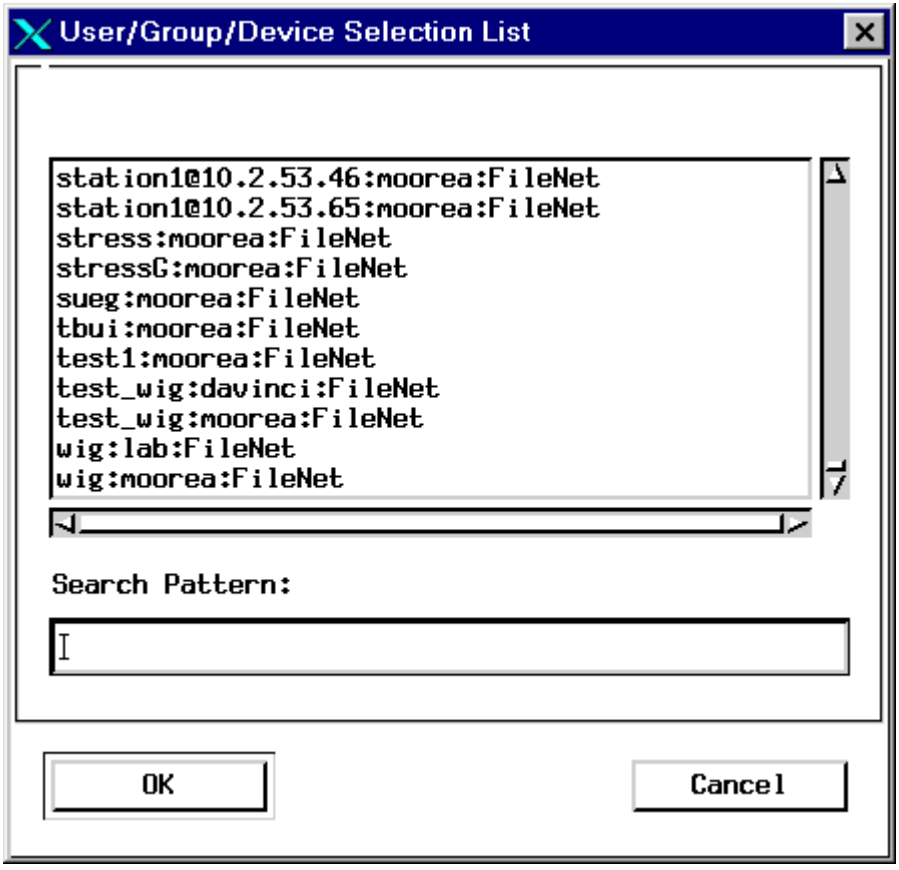
18 You will see a more detailed Add Group screen.



Click **Add** next to the Group's Members window. This allows you to add the recently defined user to the new group.

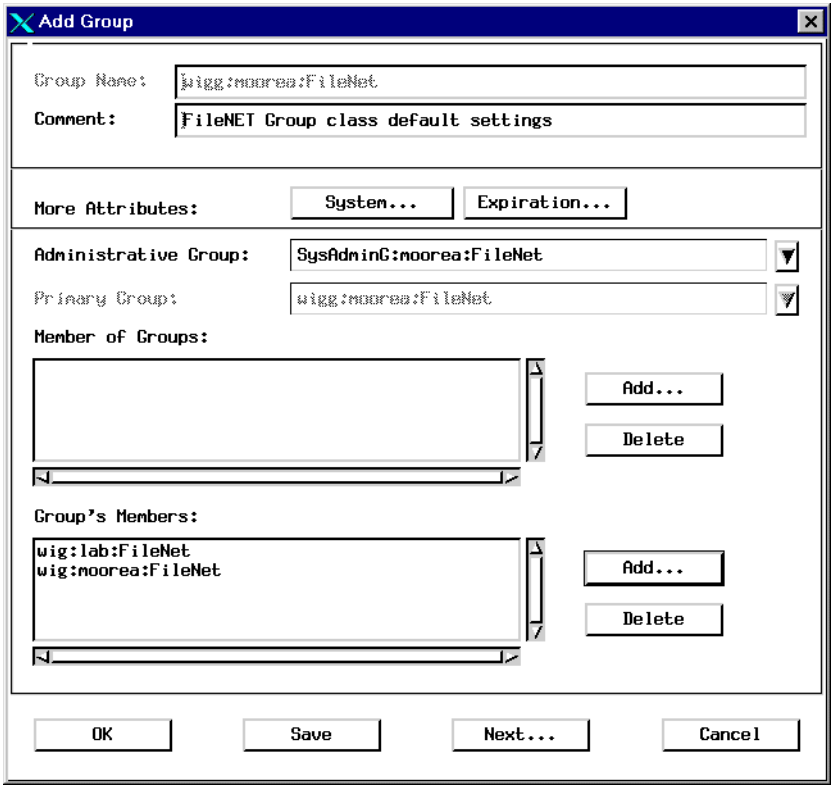
19 You will see a list of users for the source system. You should see two entries on this list for the users you defined previously. They will have the format:

username:source:organization
username:target:organization.



Click on the source system user, then click **OK**. This takes you back to the previous Add User Window. You will see that the user is added to the group.

20 As before, click the Add button next to the Group's Members window. Select the target system user from the list and click **OK**. You should see the source and target users added to the group.



21 Click **OK** to exit the Add Group screen. Click **OK** on the confirmation message. You should now see the Security Administration menu.

22 Exit Security Administration by clicking the System pull-down menu, followed by the Exit selection. You will see the main Application Executive window. Don't exit Application Executive.

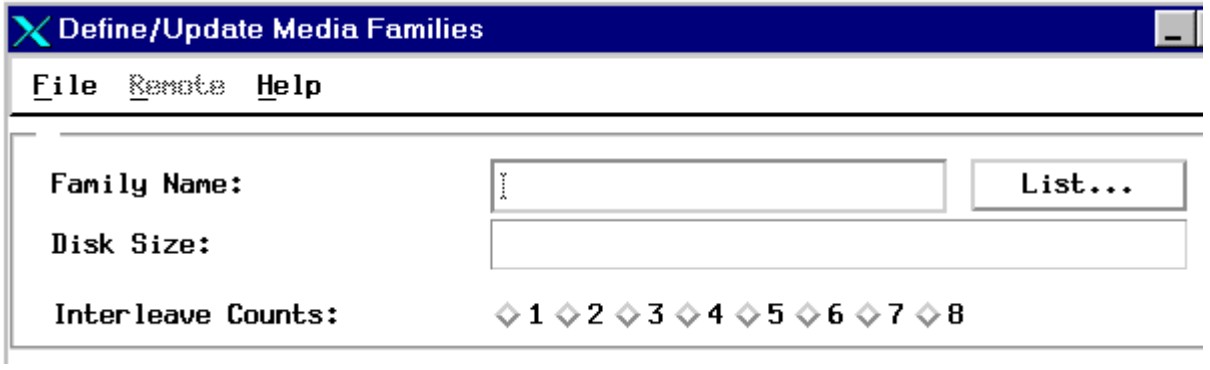
Verify/configure optical disk family on the source system

This section involves the creation (or verification) of an optical disk family for cross-committal. Note that you will be creating (or verifying) the same family on the target system as well.

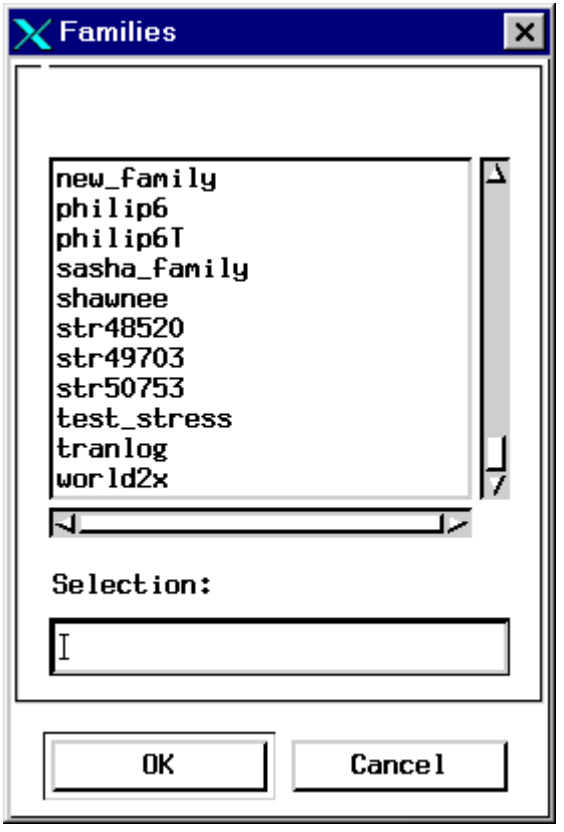
1 From the Applications Executive main window, select the Applications pull-down window followed by Database Maintenance.

2 From the Database Maintenance screen, select the Families pull-down menu followed by Define/Update Family.

3 The Define/Update Media Families screen displays.



4 Click **List** to display a list of media families.



5 You may select an existing family by clicking on a family name or you may create a family by entering a new family name in the selection field. Click the OK button when done.

6 The Define/Update Media Families screen appears with the name of your family in the Family Name field. If you selected an existing family, there will be a value in the Disk Size field.

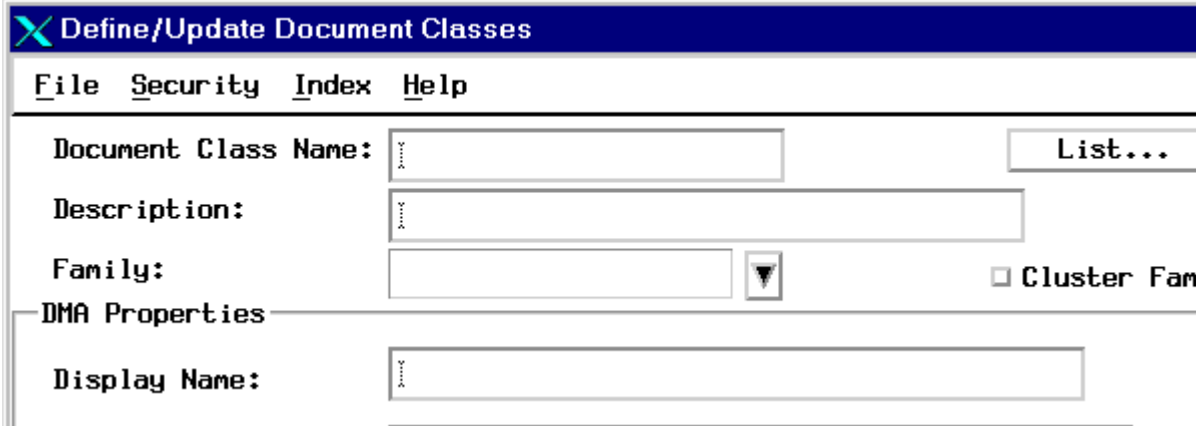
7 If you are creating a new family, click the down arrow button to select a size.

8 Complete the remaining steps pertaining to primary/tranlog selection, etc. Click **OK** on any confirmation messages. Take note of all the settings because you will be creating an identical family on the target system. When finished, select the File pull-down menu followed by Exit. Click **OK** on any confirmation messages. The Database Maintenance will appear. Do NOT exit from Database Maintenance.

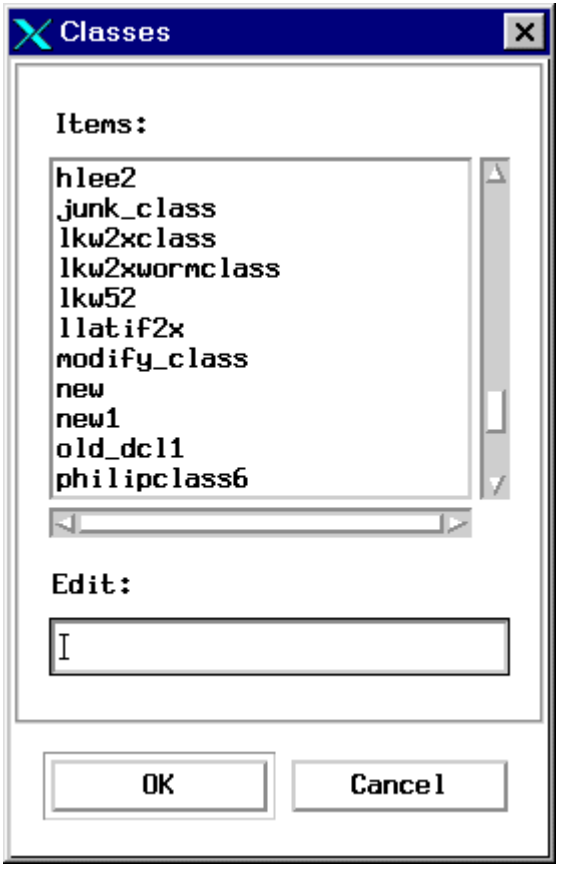
Verify/configure document class on source system

This section involves the creation (or verification) of a document class for cross-committal. Note that you will be creating the same class on the target system as well.

1 From the Database Maintenance screen, select the Classes pull-down menu followed by Define/Update Class. The Define/Update Document Classes screen appears.



2 Click the **List** button located next to the Document Class Name field. You will see a list of available document classes as well as a field for entering a new document class.



3 Enter the name of a new document class in the Edit field or click on an existing class. Click **OK**.

4 The Define/Update Document Classes screen appears again. If you are creating a new class, all the fields will be blank. If you are using an existing class, note that an optical disk family is associated with the class. Compare the family to the family you indicated in the checklist.

   If you are creating a new class OR if you need to change the optical disk family, click the down arrow button next to the Family field. This will display a list of available families. Click on the family you created earlier.

5 Fill out the rest of the required information to complete the document class creation. Take note of all your entered values because you will be creating an identical document class on the target system.

Important Add indexes and security parameters as needed to this document class. Note that the index names and index security on the source and target server need not match.

6 When finished with the document class parameters, click the **File** pull-down menu followed by Save. Click on the confirmation messages. Click **File** again followed by **Exit**.

7 From the Database Maintenance screen, click on the **Miscellaneous** pull-down menu followed by **Exit**. You should be in the command line mode on the source system.

8 Logout of the source system.

Verify/configure user IDs and passwords on the target system

Server types

Perform the steps in this section on these servers:

Root server on the target system.

You must create User IDs and passwords for the target server that match what you entered on the source server. If the User IDs or passwords do not match, the cross-committal process will not work correctly.

1. Go to an X-station, a workstation that supports X Windows or Common Desktop Environment (CDE), or a PC with an X Windows emulator and login to the **target** system as **fnsw** user. Start X Windows.

2. Start Application Executive by entering the following at the system prompt:

   Xapex

3. Log on to Application Executive as **SysAdmin**.

   For complete instructions on using Xapex refer to the *FileNet Image Services System Administrator's Handbook*. To download this handbook from the IBM support page, see **"Accessing IBM FileNet documentation" on page 10**.

4. Click the Applications pull-down menu from the Applications Executive screen. Select Security Administration. You will be creating a set of user/group objects that appear similar to the following:

source: source server summary	target: target server summary
tom:target:YourCorp	tom:source:YourCorp
tom:source:YourCorp	tom:target:YourCorp
	tomgroup:source:YourCorp

Important Even though you created a **target** user on the **source** system in the previous steps (tom:target:YourCorp, for example), you must repeat the steps on the **target** system.

Attention The following steps assume that you **don't** have existing users and groups allocated for cross-committal usage. If you wish to use existing security objects, you must ensure that there are identical security objects on both the source and target systems.

Add user to the source system

5 From the Users pulldown menu, select Add User.

6 The Add User window appears. It should display the **target** system's domain in the field for the Domain:Organization.

7 If the **target** server is **not** indicated in the Domain:Organization field, use the down arrow button to select the target system Domain:Organization.

8 Enter the name of the user that you entered in the previous steps for the **source** server configuration. Click **OK**.

9 At the next Add User window, enter the additional required information. You must, at very least, enter password information by clicking the Password button.

Important The password for the **target** user must be the same as the password used on the **source** system.

Click **OK** to accept the new user. Click **OK** when you receive the confirmation that the user was added successfully.

10 At this point, you should be back in the Security Administration menu. You will now add the same user for the **source** system.

Add identical user to the target system

11 From the Users pulldown menu, select Add User.

12 The Add User window has the **target** system's domain in the field for the Domain:Organization. Use the down arrow button to select the **source** system Domain:Organization.

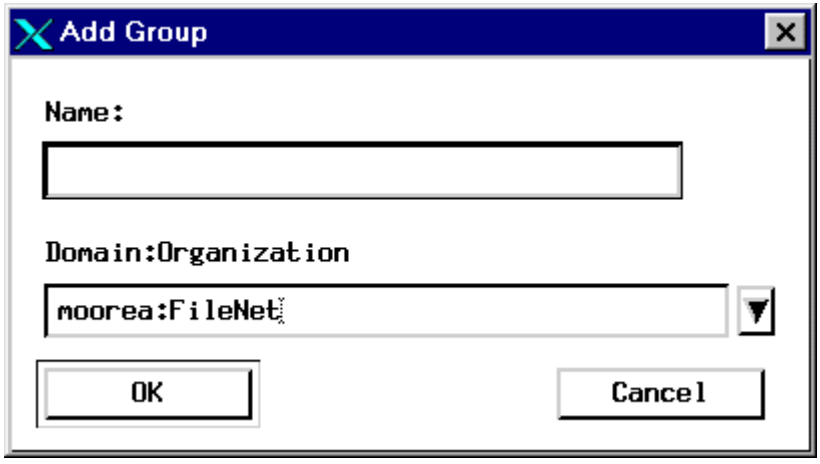
13 Enter the same name of the user you entered earlier. Click **OK**.

14 At the next Add User window, enter the additional required information. Click the Password button and enter the same password as you did earlier. Click the required **OK** buttons to accept the password and the new user. Click **OK** when you receive the confirmation that the user was added successfully.

15 At this point, you should be back in the Security Administration menu. You will now add a group for the target system.

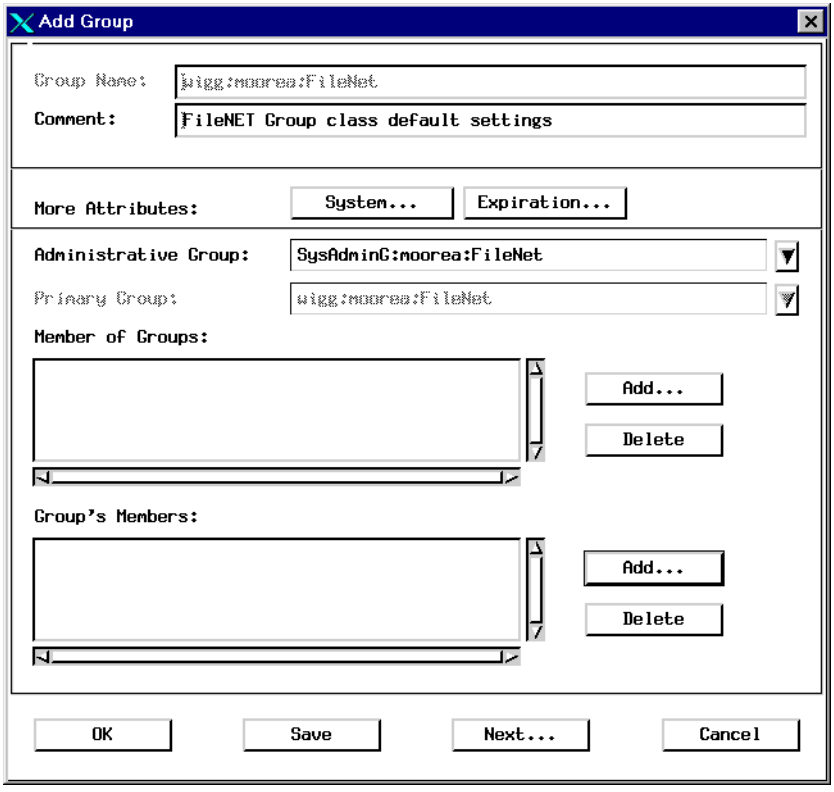
Add group to the target system

16 From the Security Administration menu, Select the Groups pull-down menu. Click on Add Group. The Add Group window appears. It should display the **target** system's Domain:Organization in the field for the Domain:Organization.



17 Enter the name of the administrative group to which the cross-committal user will belong. Click **OK**.

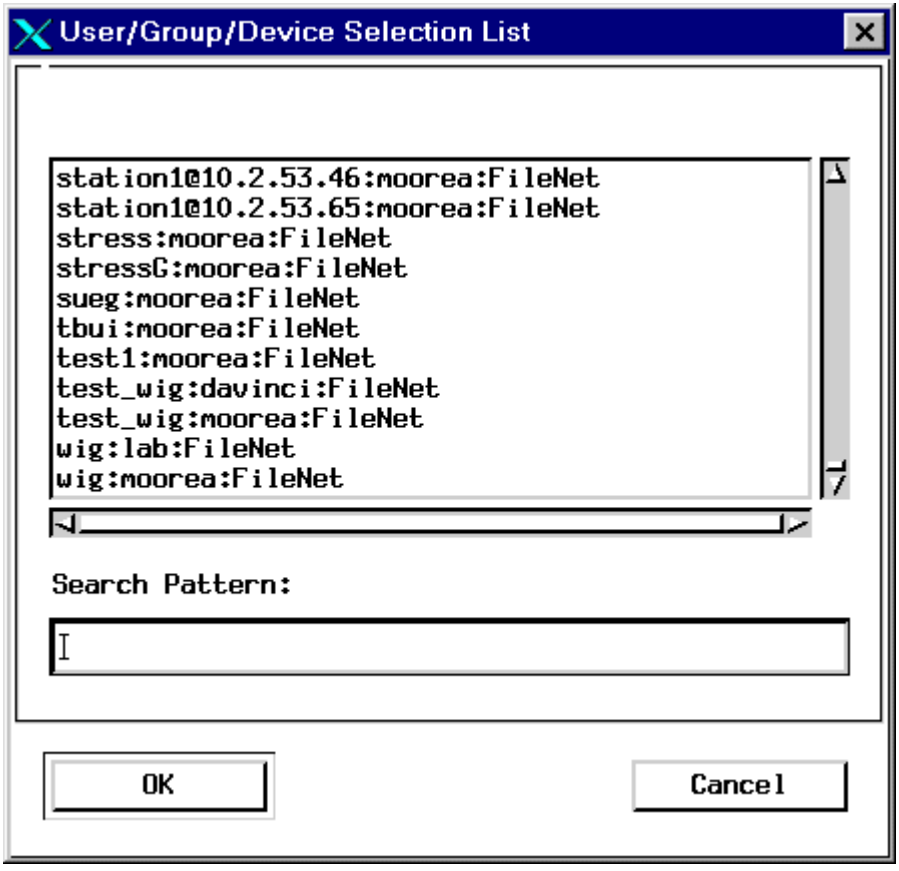
18 You will see the next Add Group screen.



Click **Add** next to the Group's Members window. This will allow you to add the recently defined user to the new group.

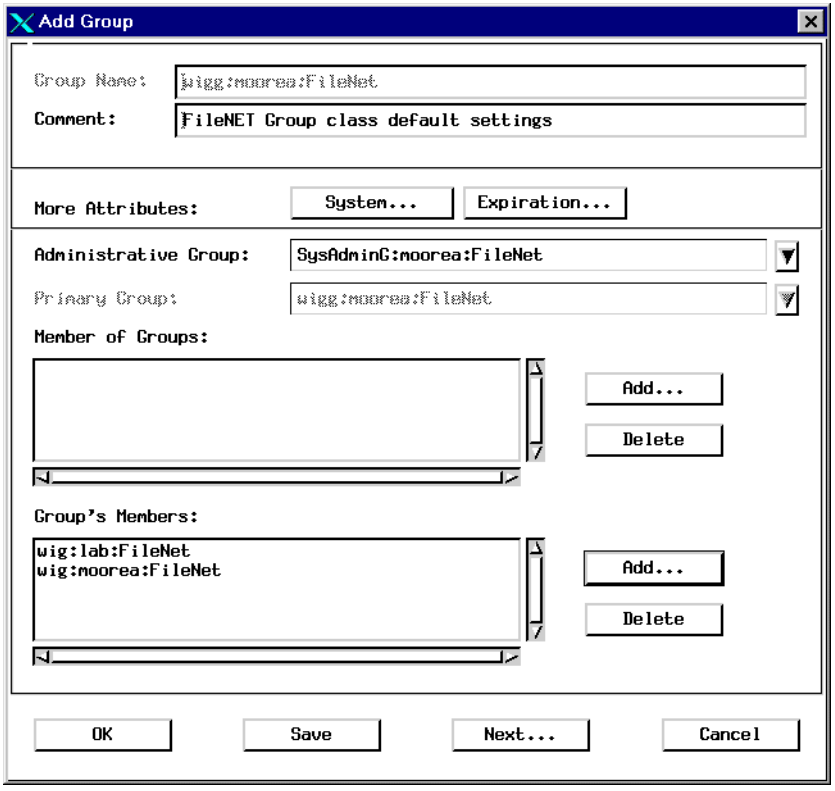
19 You will see a list of users for the source system. You should see two entries on this list for the users you defined previously. They will have the format:

username:source:organization
username:target:organization.



Click on the source system user, then click **OK**. This will take you back to the previous Add User Window. You will see that the user is added to the group.

20 As before, click **Add** next to the Group's Members window. Select the target system user from the list and click **OK**. You should see the source and target users added to the group.



21 Click **OK** to exit the Add Group screen. Click **OK** on the confirmation message. You should now see the Security Administration menu.

22 Exit Security Administration by clicking the System pull-down menu, followed by the Exit selection. You will see the main Application Executive window. Don’t exit Application Executive.

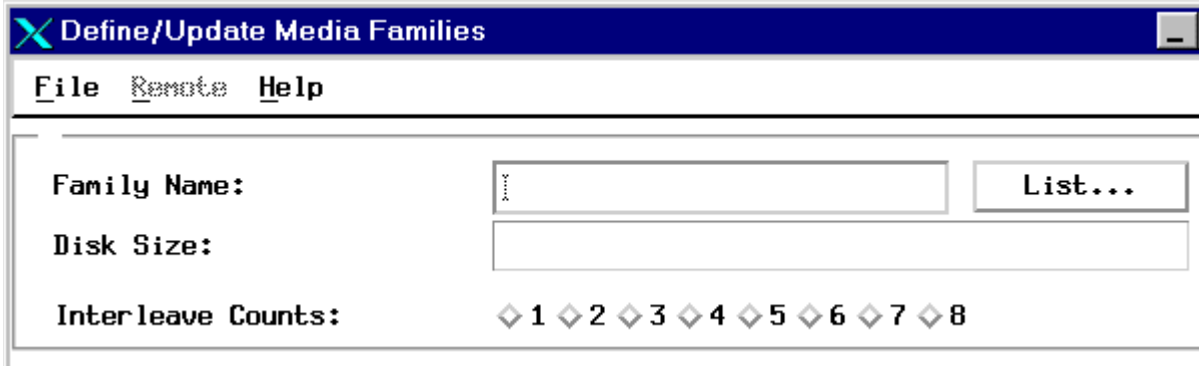
Verify/configure optical disk family on the target system

This section involves the creation (or verification) of an optical disk family for cross-committal. Note that you will be creating (or verifying) the same family on the target system as you did on the source system.

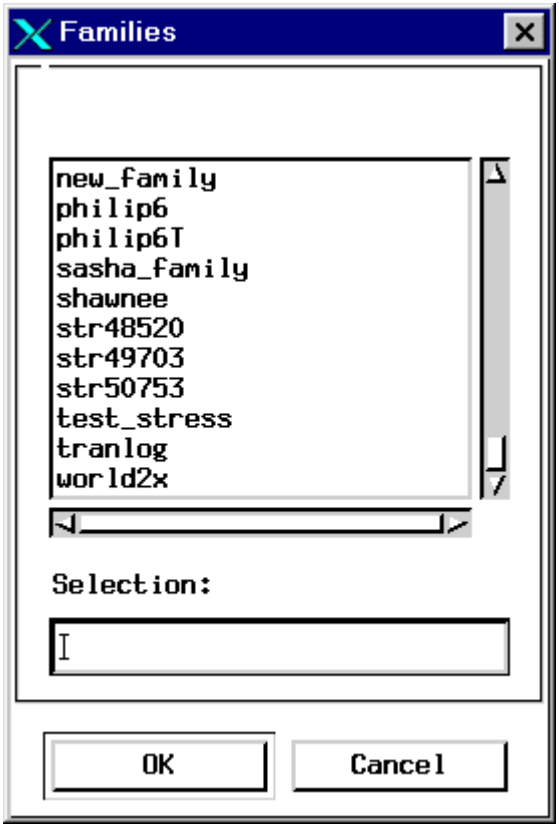
1 From the Applications Executive main window, select the Applications pull-down window followed by Database Maintenance.

2 From the Database Maintenance screen, select the Families pull-down menu followed by Define/Update Family.

3 The Define/Update Media Families screen displays.



4 Click **List** to display a list of media families.



5 You may select an existing family (provided it is the same family name as that on the source system) by clicking on a listed family name, or you may create a family by entering a new family name in the selection field. Click **OK** when you're done.

6 The Define/Update Media Families screen appears with the name of your family in the Family Name field. If you selected an existing family, there will be a value in the Disk Size field.

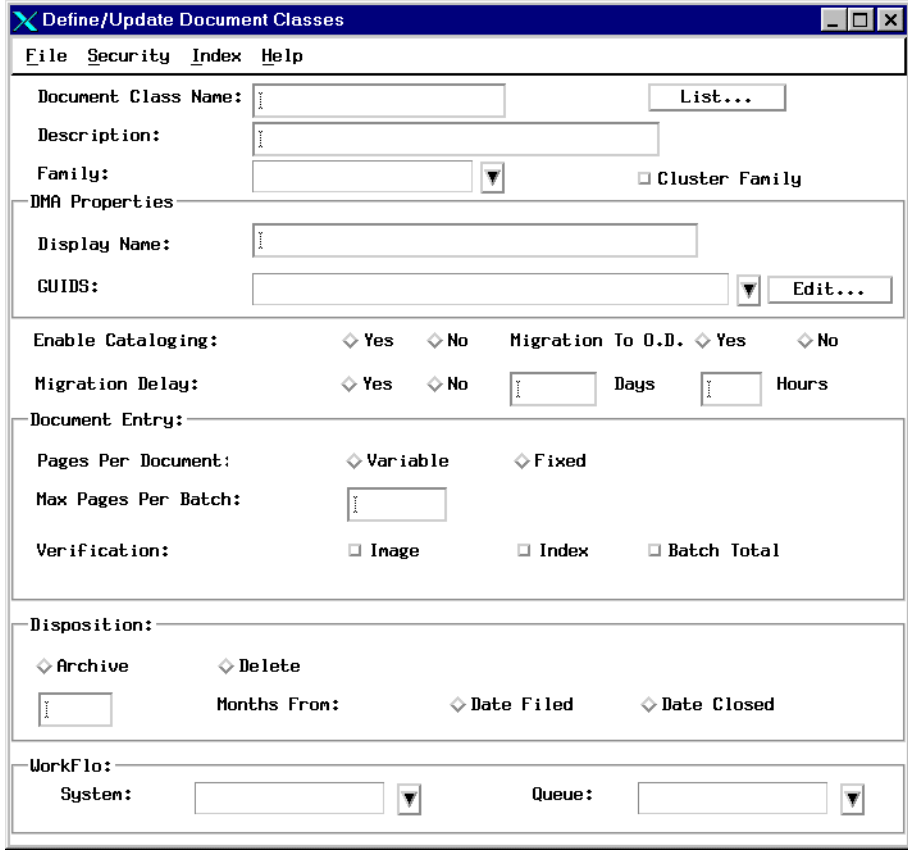
7 If you are creating a new family, click the down arrow button next to the Disk Size field to select a size.

8 Complete the remaining steps pertaining to primary/tranlog selection, etc. Click **OK** on any confirmation messages. Make sure the family name matches the source system's family name. When finished, select the File pull-down menu followed by Exit. Click **OK** on any confirmation messages. The Database Maintenance will appear. Do NOT exit from Database Maintenance.

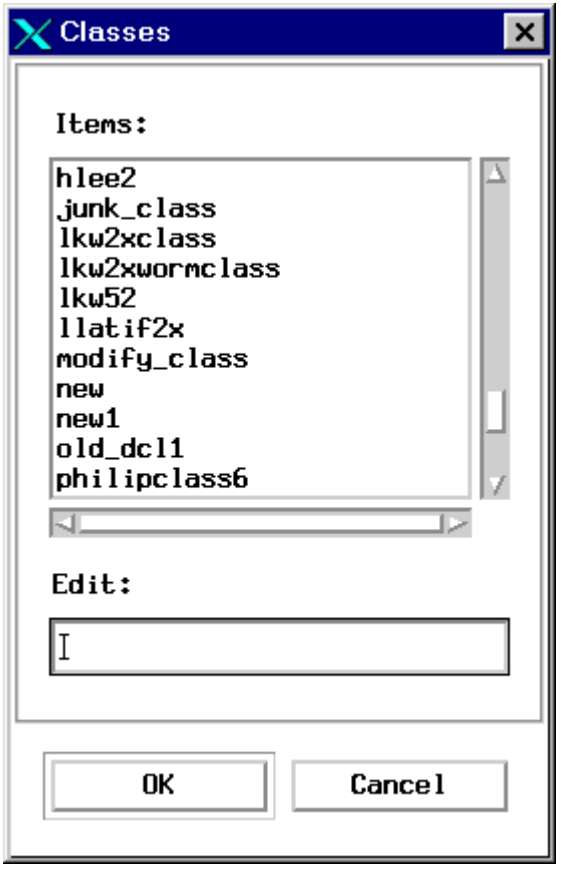
Verify/configure document class on the target system

This section involves the creation (or verification) of a document class for cross-committal. Note that you created (or verified) the same class on the target system as well.

1 From the Database Maintenance screen, select the Classes pull-down menu followed by Define/Update Class. The Define/Update Document Classes screen appears.



2 Click **List** located next to the Document Class Name field. You will see a list of available document classes as well as a field for entering a new document class.



3 Select an existing class or enter the name of a new document class in the Edit field. Click **OK**.

4 The Define/Update Document Classes screen appears again. If you are creating a new class, all the fields will be blank. If you are using an

existing class, note that an optical disk family is associated with the class. Compare the family to the family you used on the source system.

If you are creating a new class OR if you need to change the optical disk family, click the down arrow button next to the Family field. This will display a list of available families. Click on the family you created earlier.

5 Fill out the rest of the required information to complete the document class creation. Make sure that the disposition parameters match those of the identical document class on the source system.

Important Add indexes and security parameters as needed to this document class. Note that the index names and index security on the source and target server need not match.

6 When finished with the document class parameters, click the **File** pull-down menu followed by **Save**. Click on the confirmation messages. Click **File** again followed by **Exit**.

7 From the Database Maintenance screen, click on the Miscellaneous pull-down menu followed by **Exit**. You should be in the command line mode on the target system.

Test the cross-committal configuration

For information on scheduling committal processes, see **Chapter 4, "Scheduling system committals," on page 107**.

When the FileNet software has started successfully, the system is ready to run. Test the system by entering, committing, and retrieving several documents to make sure they've been committed on the appropriate systems.

Return to production mode

The upgrade is finished and you can restart the FileNet Image Services software and return your FileNet system to normal operation.

3

Configuring multi-committal systems

A multi-committal system is an independent FileNet Image Services system that contains a Storage Library server and commits images both to its own Storage Library and to the Storage Library of another independent FileNet system. Multi-committal systems may or may not be “compatible” systems with non-overlapping document IDs. If they are not compatible, new doc IDs are assigned on the target system. This could prove to be a minor performance consideration.

Multi-committal checklist

Each of the FileNet systems in a cross-committal configuration or a multi-committal configuration is an independent system with a Root/Index server. For this reason, each system is considered a **peer system** by all the others. These procedures will differentiate between the peers by referring to **source** and **target** systems.

System domain names

A multi-committal system will have two peer domains. One is the **source** system (no resident storage library) and one is the **target** system (storage library is present). Enter their names in the following table.

	Source System	Target System
Domain Name	_____	_____
Organization Name (if different)	_____	_____

Document ID numbers

In a multi-committal system configuration, the document ID number ranges can overlap.

Enter the document ID ranges on the following table. Note that the total range is 100,000 to 3,999,999,999.

Source System Starting Doc ID	Source System Ending Doc ID	Target System Starting Doc ID	Target System Ending Doc ID
_____	_____	_____	_____

User accounts

The FileNet Image Services user account name(s) that do the committing on the source system must match the user names on the target system. The users must belong to the same primary group. The user account passwords must match on both systems as well.

You will be creating the user accounts/passwords/groups later in this procedure depending on how your systems are currently configured. Answer the following questions to determine your configuration tasks.

User account name: _____

User account password: _____

User account primary group: _____

User account currently exists on source system: Yes No

User account currently exists on target system: Yes No

If yes to both questions, is the password for both accounts identical?

Yes No

User account is a member of the same primary group on both systems:

Yes No

Document classes

Although not required for multi-committal systems, for organizational purposes, you may want to have document class must match on both the source and target systems.

Document class name for source: _____

Document class name for target: _____

Important Document class security does not have to match on source and target.

Optical disk families

Optical disk families do not need to match on the source and target systems for multi-committal configurations.

Optical disk family name for source: _____

Optical disk family name for target: _____

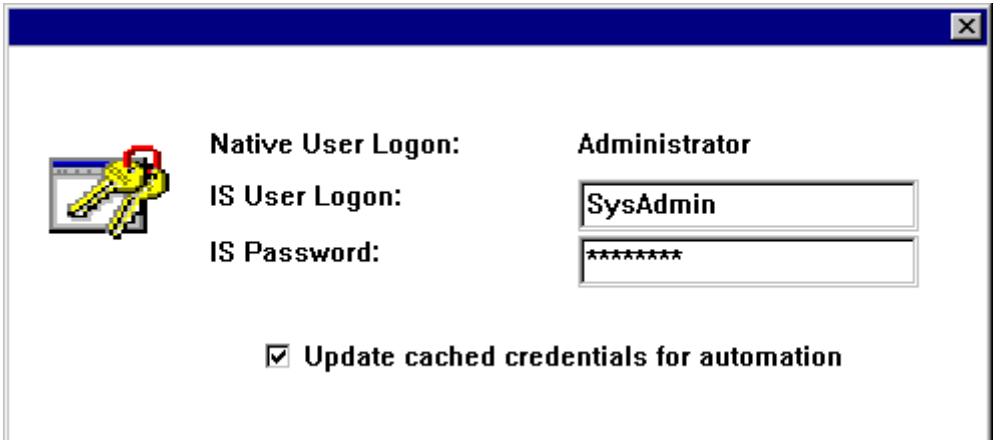
For Windows Servers only

WIN

Every Windows server in a multi-committal configuration must have the Cached Credentials options selected.

1 Start Xapex.

2 In the login dialog box, select Update cached credentials for automation, and click **OK**.



Configure multi-committal systems

As you complete the following subsections, be careful to distinguish between the **source** system for document entry and the **target** system for document committal.

Update the host file on the source system

The host file is typically located in the C:\Windows directory and contains information that allows the source server to locate a target server. The information in the host file includes the IP address, the server name, and the four-part NCH name. Locate and open the host file in a text editor. Add the host information for each target server in the multi-committal system.

Multi-committal peers

There are two types of Peers:

The **Compatible Peer** configuration contains remote system SSN and requires that the doc_id number ranges **not** overlap.

The **Non-Compatible Peer** configuration DOES NOT contain system SSN and allows the doc_id ranges to overlap.

Multi-committal configurations support BOTH compatible and non-compatible configurations. This is helpful if you do not want to limit the number of doc_ids by dividing up the ranges on each system. You can create peers WITHOUT the SSN for incompatible systems, and the doc_id range can overlap by a little or a lot.

If the peers are created with the SSN, and error 30,0,42 is generated (at the target system):

1. Use fn_edit to delete the SSN from the **Peer Configurations** of both the source and target systems.
2. Restart FileNet Image Services. The documents will finish migrating to the target media.

Tip When removing a Peer System from a Multi-Committal System Configuration, you must remove the remote families prior to removing the peer system in fn_edit.

Add peer to source system

Each of the FileNet systems in a multi-committal System configuration is technically an independent system with a Root/Index server. For this reason, each system is considered a **peer system** by all the others. These procedures will differentiate between the peers by referring to **source** and **target** systems.

Important The system serial number (ssn) of each peer system is listed in the as_conf.g file on the Root server. You will use the ssn in the Configuration Editor to add additional peer systems.

1. Go to an X-station, a workstation that supports X Windows or Common Desktop Environment (CDE), or a PC with an X Windows emulator and login to your **source** system as **fnsw** user.
2. As **fnsw** user, run **fn_edit** by entering:

   fn_edit &

   The Open Configuration Database dialog box displays.
3. Verify that the two-part domain information is correct and click **OK**. The System Configuration Editor window displays.
4. Click on the Procedures tab in the System Configuration Editor window.
5. Select the Add a Peer System option from the Procedure List Box, then click Run.
6. Enter the domain name of the Peer server, for example, **target**.

Tip If the organization name of the target Peer server is different from the organization name of the source Peer server, enter both the domain name and the orgainization name. For example, **target:YourCorp**.

7 Enter the ssn of the target Peer server.

8 Enter the network address of the target Peer server.

Set document number ranges on the source system

9 Select the System Application Services tab.

10 Select the Document Services tab. You should see the source and target server names displayed.

11 Enter the appropriate amounts for the Document Number (high value) and Document Number (low value) for both the source server and the target server. THESE NUMBERS CAN NOT OVERLAP.

Verify/configure batch entry services on the source system

1 Select the Server Application Services tab.

2 Select the Batch tab.

3 You will see a box entitled **Target Image Services Domain Name**. Click the down arrow icon in the box.

4 Select the domain name of the **local** system from the list box. Your selection determines the system where the batches will be committed. Since both (source and target) systems will write to their own local media, the local domain name will be selected in this field. (default)

5 Under the Batch tab, click on Fast Batch Committal. Toggle **Yes** (check mark) or **No** (an 'X' mark) by clicking on the left mouse button. Set Fast Batch Committal to **Yes** for multi-committal systems.

6 Click the System Applications Services Tab. Click the Others subtab. Make sure Cataloging Enabled is set to **Yes** if you are configuring a multi-committal System .

7 Click on the Performance Tuning tab in the System Configuration Editor window.

8 Click on Server Process.

9 Click on the arrow button to increase or decrease the number of bes_commit processes.

10 From the System Configuration Editor window, Click on the **File** pull down menu and click on the **Exit** option.

11 You will then be asked if you want to save the changes you have just made to the current configuration database before you exit. Click on the **Yes** button to save the configuration and exit the System Configuration Editor.

12 Put the changes into effect by restarting the server by entering the following at the command line:

initfnsw -y restart

13 Logout of the source system.

Add peer to target system

The procedures for target system mirror the procedures you followed for the source system with one exception: the target system will be committing to itself.

Note The system serial number (ssn) of each peer system is listed in the as_conf.g file on the Root server. You will use the ssn in the Configuration Editor to add additional peer systems.

1. Go to an X-station, a workstation that supports X Windows or Common Desktop Environment (CDE), or a PC with an X Windows emulator and login to your **target** server as **fnsw** user.
2. As **fnsw** user, run **fn_edit** by entering:

   fn_edit &

   The Open Configuration Database dialog box displays.
3. Verify that the two-part domain information is correct for your target server and click **OK**. The System Configuration Editor window displays.
4. Click on the Procedures tab in the System Configuration Editor window.
5. Select the Add a Peer System option from the Procedure List Box, then click Run.
6. Enter the domain name of the Peer (source) server, for example, **source**.

Tip If the organization name of the source Peer server is different from the organization name of the target Peer server, enter both the domain name and the orgainization name. For example, **source:Yourcorp**.

7 Enter the ssn of the source Peer server.

8 Enter the network address of the Peer server.

Set document number ranges on the target system (optional)

9 Select the System Application Services tab.

10 Select the Document Services tab. You should see the source and target server names displayed.

11 Enter the appropriate amounts for the Document Number (high value) and Document Number (low value) for both the source server and the target server.

Verify/configure batch entry services on the target system

1 Select the Server Application Services tab.

2 Select the Batch tab.

3 You will see a box entitled **Target Image Services Domain Name**. Check to see if the target system name is visible, if not click the down arrow icon in the box.

4 Select the domain name of the **target** system from the list box. Your selection determines the system where the batches will be committed.

Important At this step, the target server is configured to commit to itself.

5 Under the Batch tab, click on Fast Batch Committal. Toggle **Yes** or **No** by clicking on the left mouse button. Set Fast Batch Committal to **Yes** for multi-committal systems.

6 Click the System Applications Services Tab. Click the Others subtab. Make sure Cataloging Enabled is set to **Yes**.

7 Click on the Performance Tuning tab in the System Configuration Editor window.

8 Click on Server Process.

9 Click on the arrow button to increase or decrease the number of bes_ commit processes.

10 From the System Configuration Editor window, Click on the File pull down menu and click on the Exit option.

11 You will then be asked if you want to save the changes you have just made to the current configuration database before you exit. Click on the **Yes** button to save the configuration and exit the System Configuration Editor.

12 Restart the software.

```
initfnsw -y restart
```

13 Logout of the target system.

Verify/configure user IDs and passwords on the source server

You must create User IDs and passwords that match on the source and target servers. If the User IDs or passwords do not match, the multi-committal process will not work correctly.

Server types

Perform the steps in this section on the root server of the source system

1 Go to an X-station, a workstation that supports X Windows or Common Desktop Environment (CDE), or a PC with an X Windows emulator and login to the **source** system as **fnsw** user. Start X Windows.

2 Run Application executive by entering the following at the system prompt:

Xapex &

3 Log on to Xapex as **SysAdmin**.

For complete instructions on using Xapex refer to the *FileNet Image Services System Administrator's Handbook*. To download this handbook from the IBM support page, see **"Accessing IBM FileNet documentation" on page 10**.

4 Click the Applications pull-down menu from the Applications Executive screen. Select Security Administration. You will be creating a set of user/group objects that appear similar to the following:

source: source server summary	target: target server summary
tom:target:FileNet	tom:source:FileNet
tom:source:FileNet	tom:target:FileNet
tomgroup:source:FileNet	

Attention

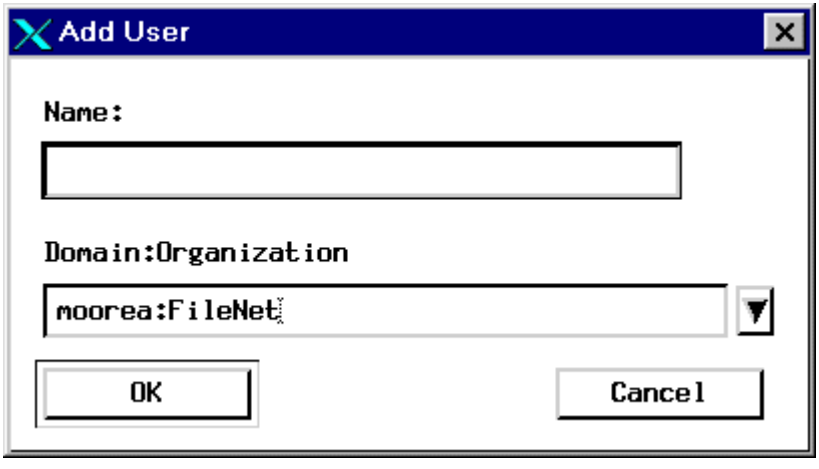
The following steps assume that you **don't** have existing users and groups allocated for multi-committal usage. If you wish to use existing

security objects, you must ensure that there are identical security objects on both the source and target server.

Add user to the source system

5 From the Users pulldown menu, select Add User.

6 The Add User window appears. It should display the source system's domain in the Domain:Organization field.



7 If the source system is **not** indicated in the Domain:Organization field, use the down arrow button to select the source system's Domain:Orgainization.

8 Enter the name of the user you wish to add for the source server in the Name field and click **OK**.

9 At the next Add User window, enter the additional required information. You must, at very least, enter password information by clicking the Password button. Click **OK** to accept the new user. Click **OK** when you receive the confirmation that the user was added successfully.

10 At this point, you should be back in the Security Administration menu. You will now add the same user for the target system.

Add identical user to the target system

11 From the Users pulldown menu, select Add User.

12 The Add User window has a field for the Domain:Organization with a default value of the source system's domain. Use the down arrow button to select the **target** system Domain:Orgainization.

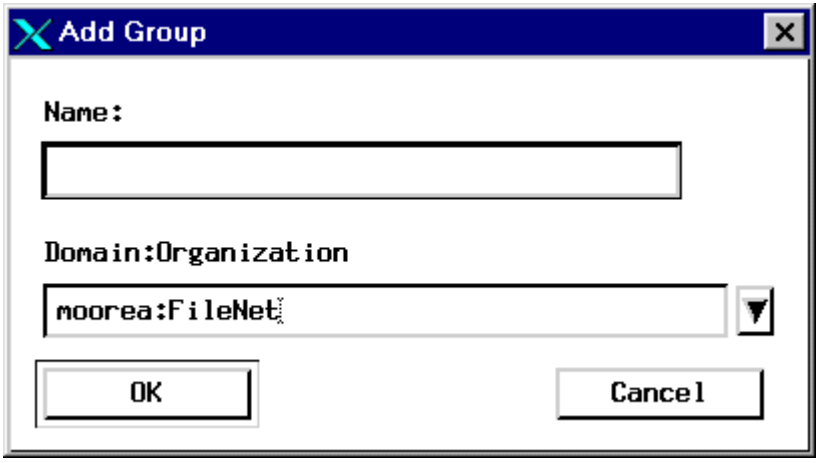
13 Enter the same name of the user you entered earlier. Click **OK**.

14 At the next Add User window, enter the additional required information. Click the Password button and enter the same password as you did earlier. Click the required **OK** buttons to accept the password and the new user. Click **OK** when you receive the confirmation that the user was added successfully.

15 At this point, you should be back in the Security Administration menu. You will now add a group for the source system.

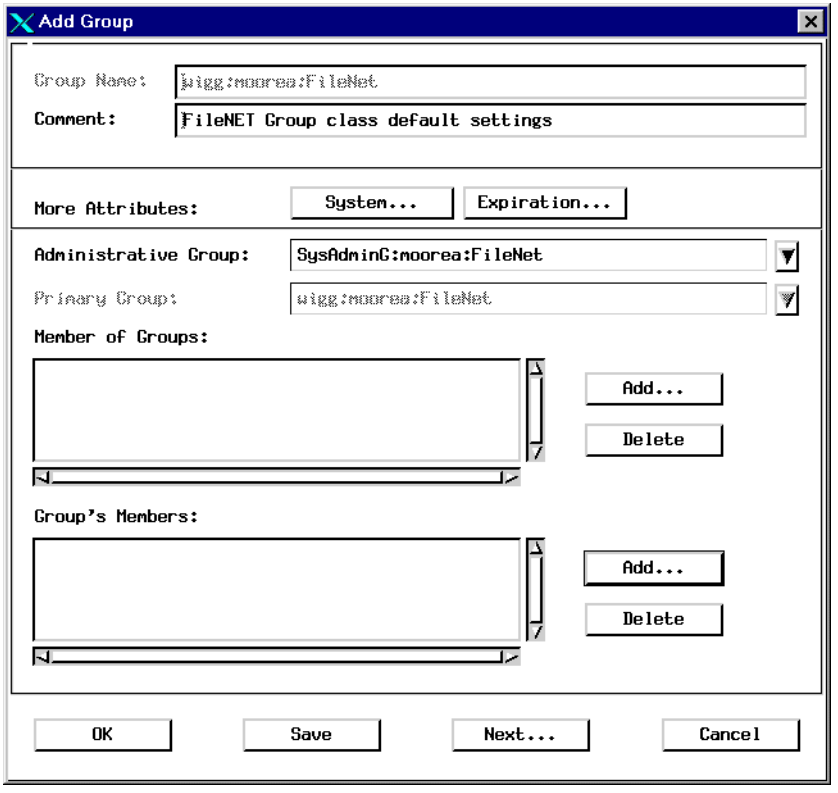
Add group to the source system

16 From the Security Administration menu, Select the Groups pull-down menu. Click on Add Group. The Add Group window appears. It should display a field for the Domain:Organization with a default value of the source system's Domain:Orgainization.



17 Enter the name of the administrative group to which the multi-committal user will belong and click **OK**.

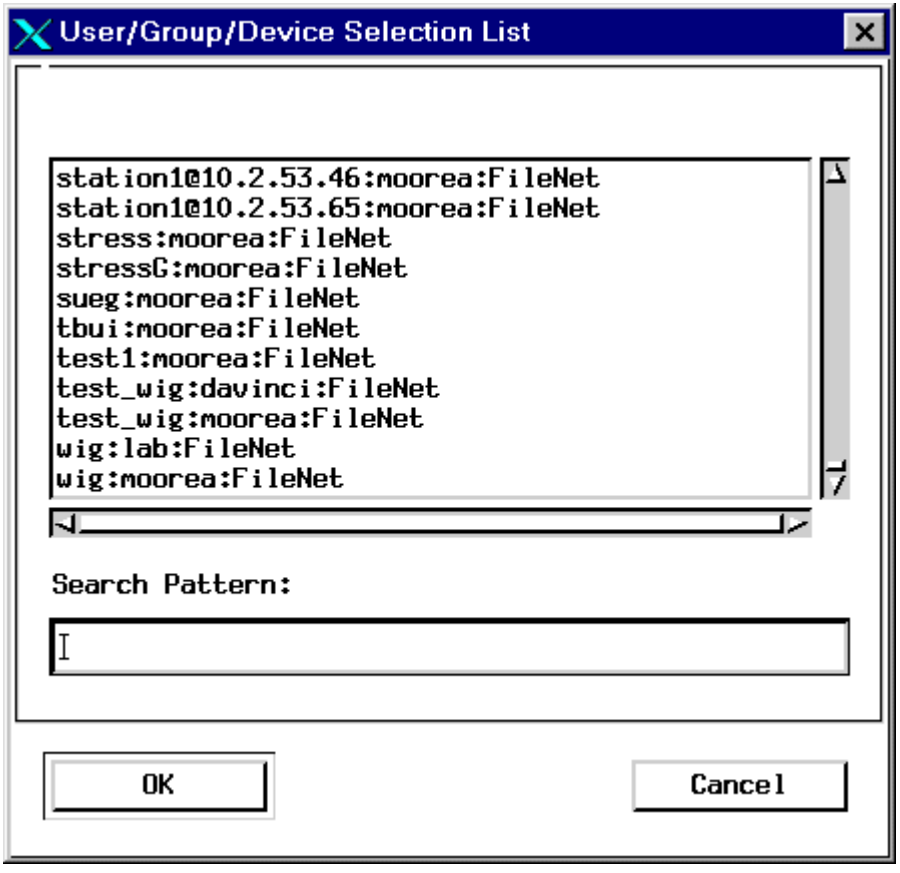
18 The Add Group dialog box appears.



Click **Add** next to the Group's Members window. This allows you to add the recently defined user to the new group.

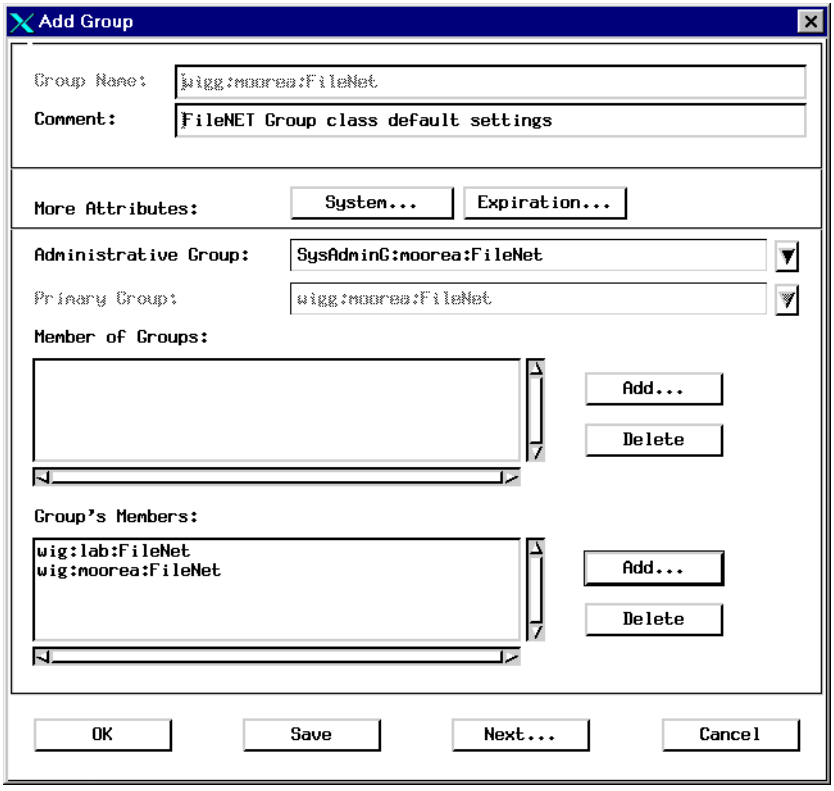
19 You will see a list of users for the source system. You should see two entries on this list for the users you defined previously. They will have the format:

username:source:organization
username:target:organization.



Click on the source system user, then click **OK**. This takes you back to the previous Add User Window. You will see that the user is added to the group.

20 As before, click **Add** next to the Group's Members window. Select the target system user from the list and click **OK**. You should see the source and target users added to the group.



21 Click **OK** to exit the Add Group screen. Click **OK** on the confirmation message. You should now see the Security Administration menu.

22 Exit Security Administration by selecting **Exit** from the System menu. The main Application Executive window appears. Don't exit the Application Executive.

Verify/configure optical disk family on the source system

This section involves the creation (or verification) of an optical disk family for multi-committal.

Important If you are creating an identical family on the target system, note the settings.

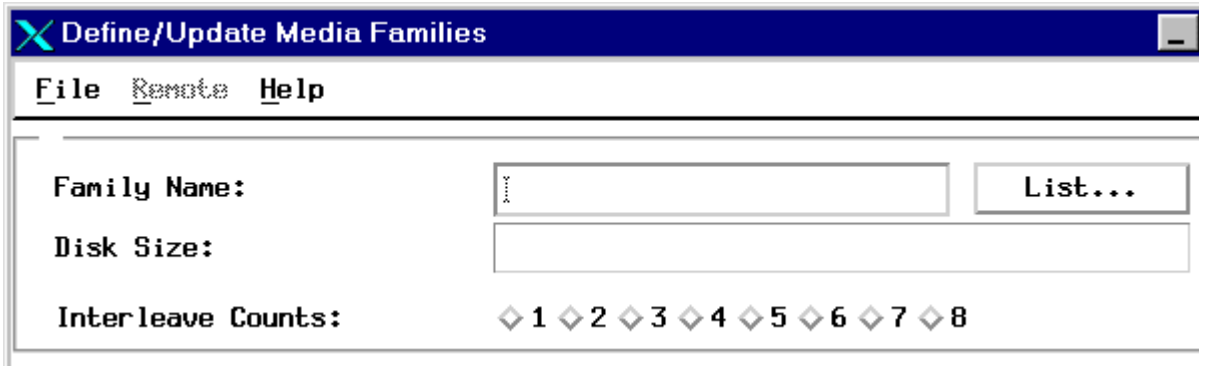
Server types Perform the steps in this section on these servers:

Root server on the source system.

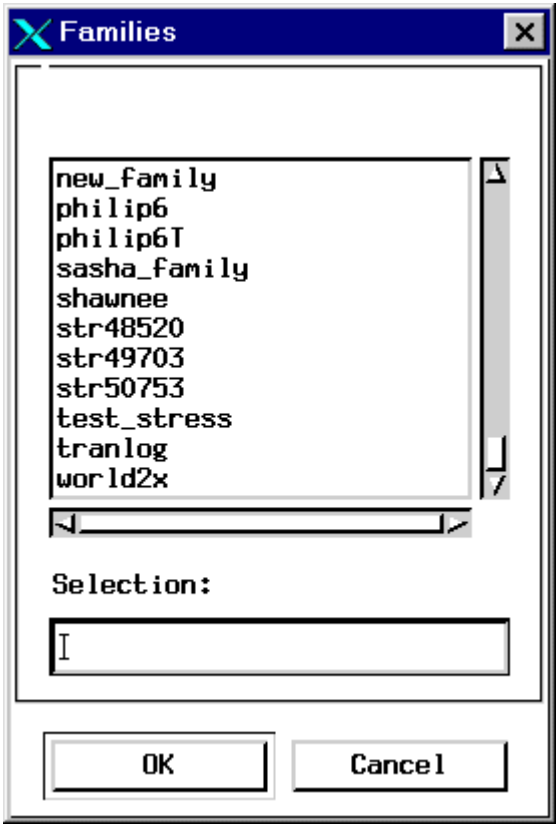
1 From the Applications Executive main window, select the Applications pull-down window followed by Database Maintenance.

2 From the Database Maintenance screen, select the Families pull-down menu followed by Define/Update Family.

3 The Define/Update Media Families screen displays.


Define/Update Media Families
File
Remote
Help
Family Name:
List...
Disk Size:
Interleave Counts:
1 2 3 4 5 6 7 8

4 Click **List** to display a list of media families.



5 You can select an existing family by clicking on a listed family name or you can create a family by entering a new family name in the selection field. Click **OK** when you're done.

6 The Define/Update Media Families screen appears with the name of your family in the Family Name field. If you selected an existing family, there will be a value in the Disk Size field.

7 If you are creating a new family, click the down arrow button to select a size.

8 Complete the remaining steps pertaining to primary/tranlog selection, etc. Click the **OK** buttons on any confirmation messages. If you are creating an identical family on the target system (not required for multi-committal systems), take note of all the settings.

9 See **"Creating a remote family" on page 89** to create a remote family.

10 When finished, select **Exit** from the **File** menu. Click the **OK** button on any confirmation messages. The Database Maintenance main window will appear. Do NOT exit Database Maintenance.

Creating a remote family

To create families on both the source and target systems complete the following steps:

1 Open the family on the source system. Select the **Remote** menu option and click **Family**.

2 Select the target domain from the **Domains** list.

Important If this list is blank, verify that the target system is configured as a peer. If an error [92,2,2] is displayed, close and restart Xapex. Log in as a user with account access to both systems.

3 After the connection is established, the **Families** list will be populated. Select the family on the remote system that will receive the documents from the source system.

Tip Family name and media **can** be different.

4 Save and exit the **Family** window.

5 Test to confirm functionality.

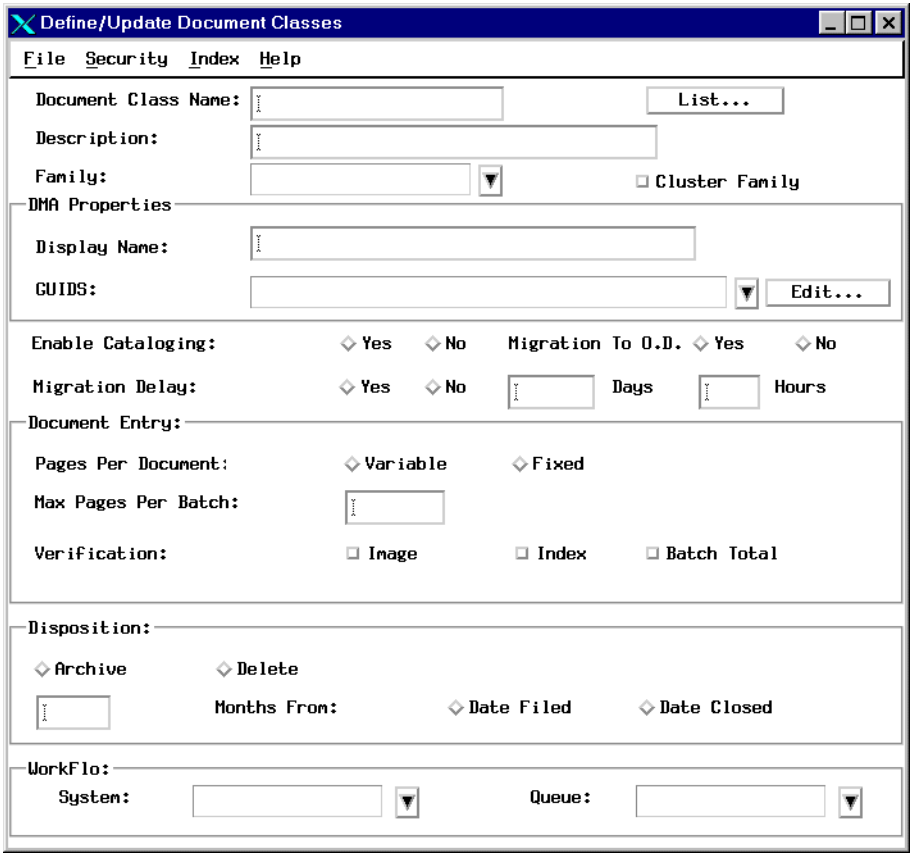
Important Documents that use this family must have a DOC CLASS that exists on both source and target systems. Documents using this family must write to the local media before it is sent to the target system.

Verify/configure document class on source system

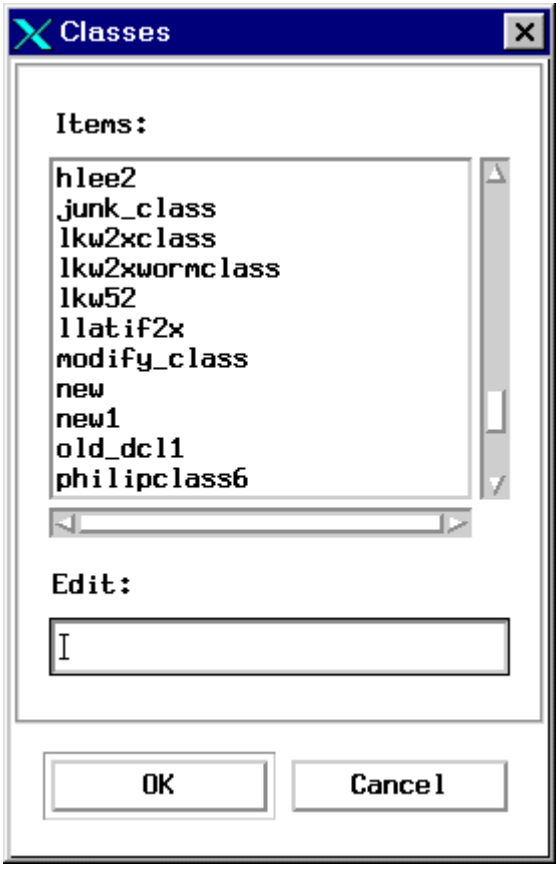
This section involves the creation (or verification) of a document class for multi-committal.

Important If you are creating an identical document class on the target system, note the settings.

1 From the Database Maintenance screen, select the Classes pull-down menu followed by Define/Update Class. The Define/Update Document Classes screen appears.



2 Click the **List** button located next to the Document Class Name field. You will see a list of available document classes as well as a field for entering a new document class.



3 Select an existing class or enter the name of a new document class in the Edit field. Click **OK**.

4 The Define/Update Document Classes screen appears again. If you are creating a new class, all the fields will be blank.

Click the down arrow button next to the Family field to retrieve a list of available families. Click on the family you created earlier.

5 Add indexes and security parameters as needed to this document class. The index names and index security on the source and target server need not match.

6 Fill out the rest of the required information to complete the document class creation.

7 When finished with the document class parameters, click the **File** pull-down menu followed by **Save**. Click on the confirmation messages. Click on **File** again followed by **Exit**.

8 From the Database Maintenance screen, click on the **Miscellaneous** pull-down menu followed by **Exit**. You should be in the command line mode on the source system.

9 Logout of the source system.

Verify/configure user IDs and passwords on the target system

Server types

Perform the steps in this section on these servers:

Root server on the target system.

You must create User IDs and passwords that match on the source and target servers. If the User IDs or passwords do not match, the multi-committal process will not work correctly.

1 Go to an X-station, a workstation that supports X Windows or Common Desktop Environment (CDE), or a PC with an X Windows emulator and login to the **target** system as **fnsw** user. Start X Windows

2 Start Application Executive by entering the following at the system prompt:

Xapex

3 Log on to Application Executive as **SysAdmin**.

For complete instructions on using Xapex refer to the *FileNet Image Services System Administrator's Handbook*. To download this handbook from the IBM support page, see **"Accessing IBM FileNet documentation" on page 10**.

4 Click the Applications pull-down menu from the Applications Executive screen. Select Security Administration. You will be creating a set of user/group objects that appear similar to the following:

source: source server summary	target: target server summary
tom:target:FileNet	tom:source:FileNet
tom:source:FileNet	tom:target:FileNet
	tomgroup:source:FileNet

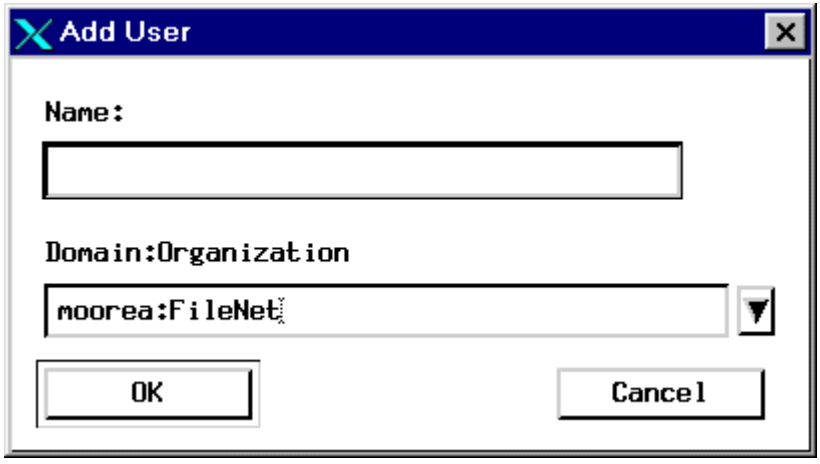
Important Even though you created a **target** user on the **source** system in the previous steps (for example, tom:target:FileNet), you must repeat the steps on the **target** system.

Attention The following steps assume that you **don't** have existing users and groups allocated for multi-committal usage. If you wish to use existing security objects, you must ensure that there are identical security objects on both the source and target systems.

Add user to the source system

5 From the Users pulldown menu, select Add User.

6 The Add User window appears. It should display the **target** system's domain in the field for the Domain:Organization.



7 If the **target** server is **not** indicated in the Domain:Organization field, use the down arrow button to select the target system Domain:Orgainization.

8 Enter the name of the user that you entered in the previous steps for the **source** server configuration. Click **OK**.

9 At the next Add User window, enter the additional required information. You must, at very least, enter password information by clicking the Password button.

Important The password for the **target** user must be the same as the password used on the **source** system.

Click **OK** to accept the new user. Click **OK** when you receive the confirmation that the user was added successfully.

10 At this point, you should be back in the Security Administration menu. You will now add the same user for the **source** system.

Add identical user to the target system

11 From the Users pulldown menu, select Add User.

12 The Add User window has the **target** system's domain in the field for the Domain:Organization. Use the down arrow button to select the **source** system Domain:Orgainization.

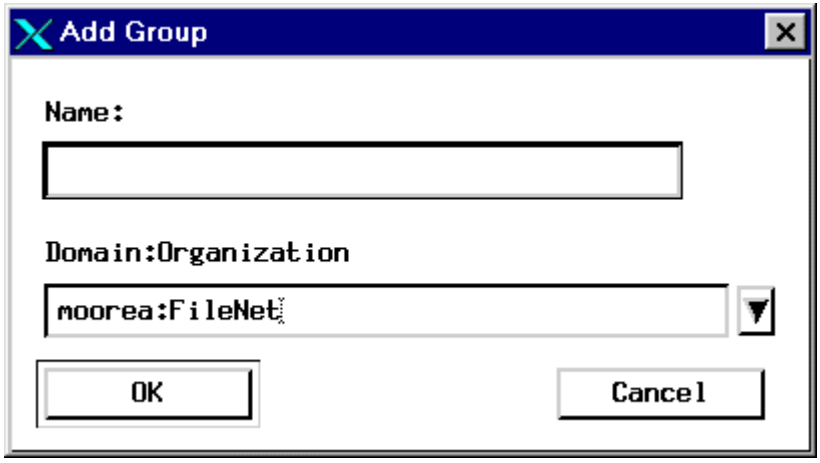
13 Enter the same name of the user you entered earlier and click **OK**.

14 At the next Add User window, enter the additional required information. Click the Password button and enter the same password as you did earlier. Click the required **OK** buttons to accept the password and the new user. Click **OK** when you receive the confirmation that the user was added successfully.

15 At this point, you should be back in the Security Administration menu. You will now add a group for the target system.

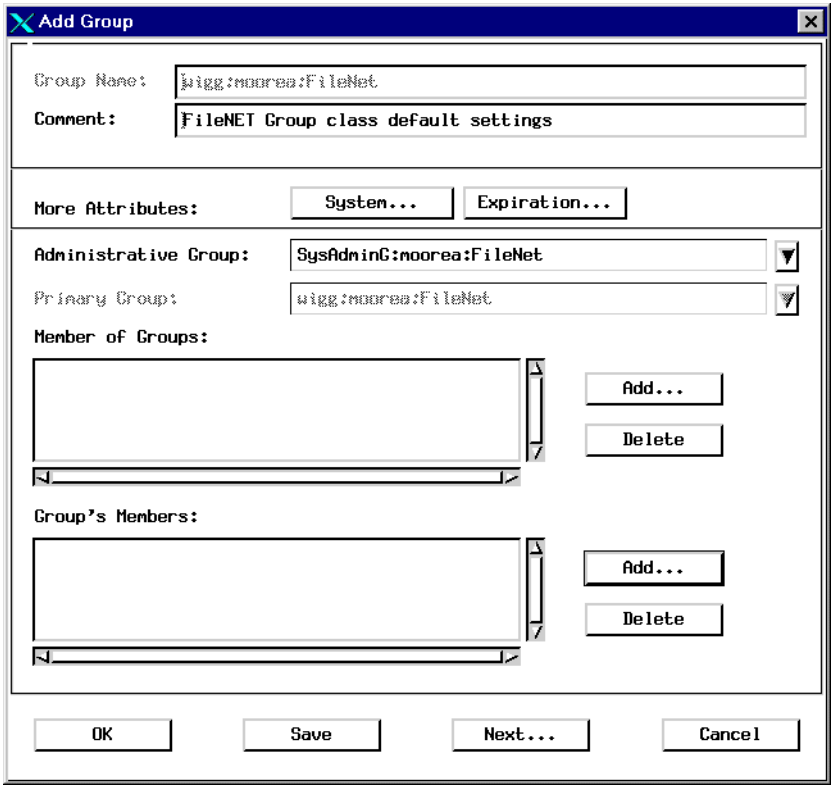
Add group to the target system

16 From the Security Administration menu, Select the Groups pull-down menu. Click on Add Group. The Add Group window appears. It should display the **target** system's Domain:Organization in the field for the Domain:Organization.



17 Enter the name of the administrative group to which the multi-committal user will belong. Click **OK**.

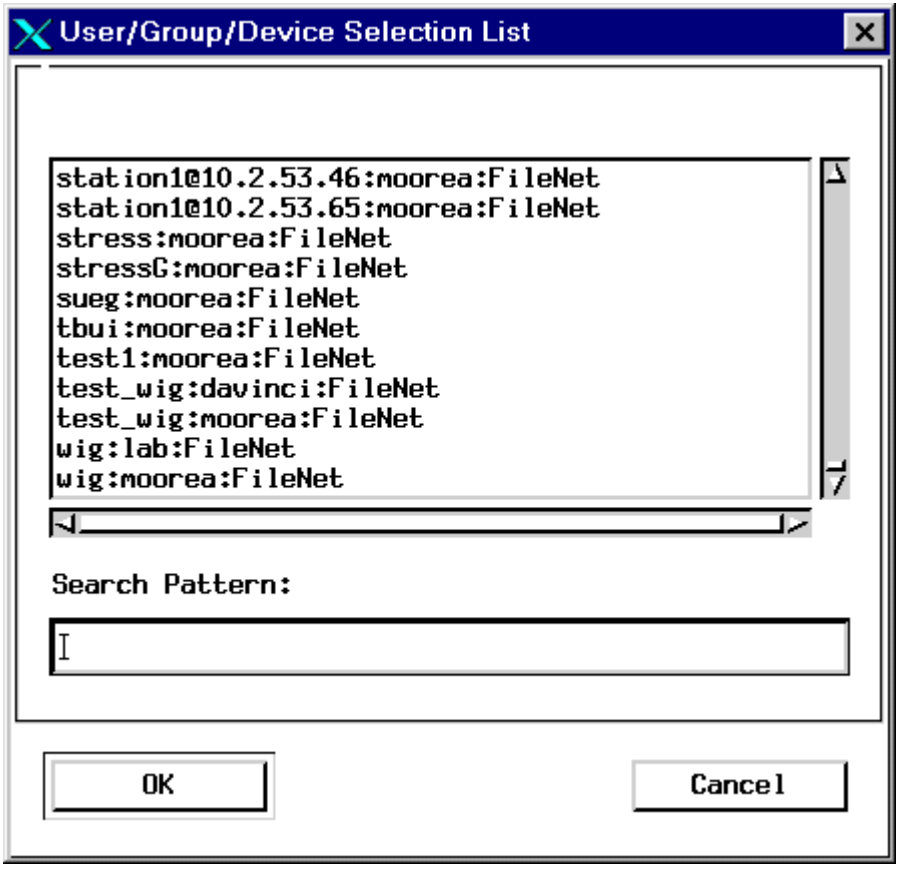
18 You will see the next Add Group screen.



Click the **Add** button next to the Group's Members window. This will allow you to add the recently defined user to the new group.

19 You will see a list of users for the source system. You should see two entries on this list for the users you defined previously. They will have the format:

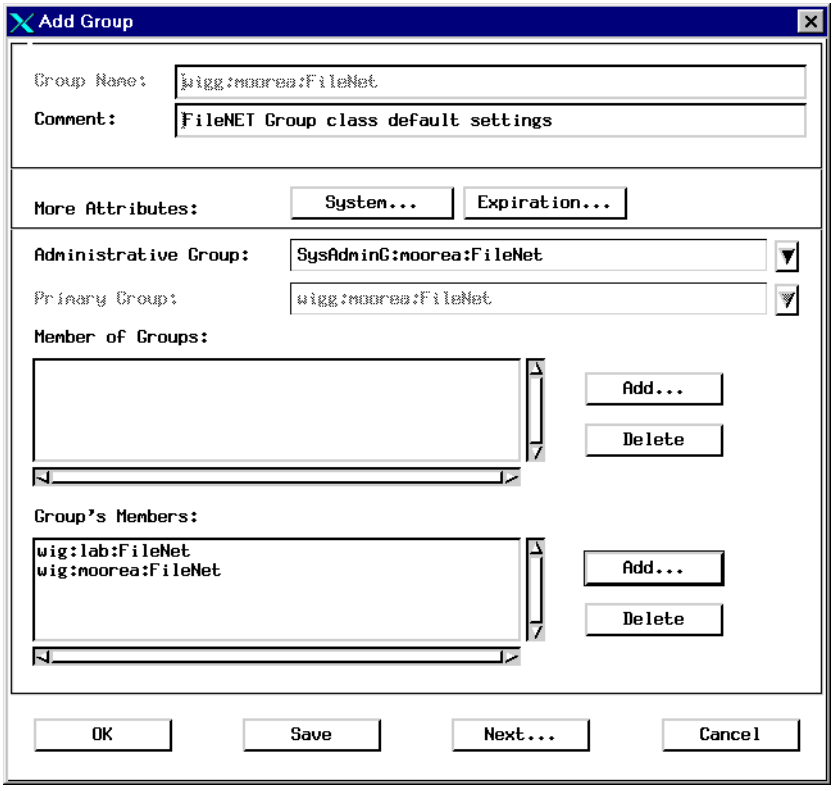
username:source:organization
username:target:organization.



Select the source system user, then click the **OK** button. This takes you back to the previous Add User Window. You will see that the user is added to the group.

20 As before, click the **Add** button next to the Group's Member window. Select the target system user from the list and click the **OK** button. You should see the source and target users added to the group

.



21 Click **OK** to exit the Add Group screen. Click **OK** on the confirmation message. You should now see the Security Administration menu.

22 Exit Security Administration by clicking the System pull-down menu, followed by the **Exit** selection. You will see the main Application Executive window. Don't exit Application Executive.

Verify/configure optical disk family and document class on the target system

This section involves the creation (or verification) of an optical disk family for multi-committal.

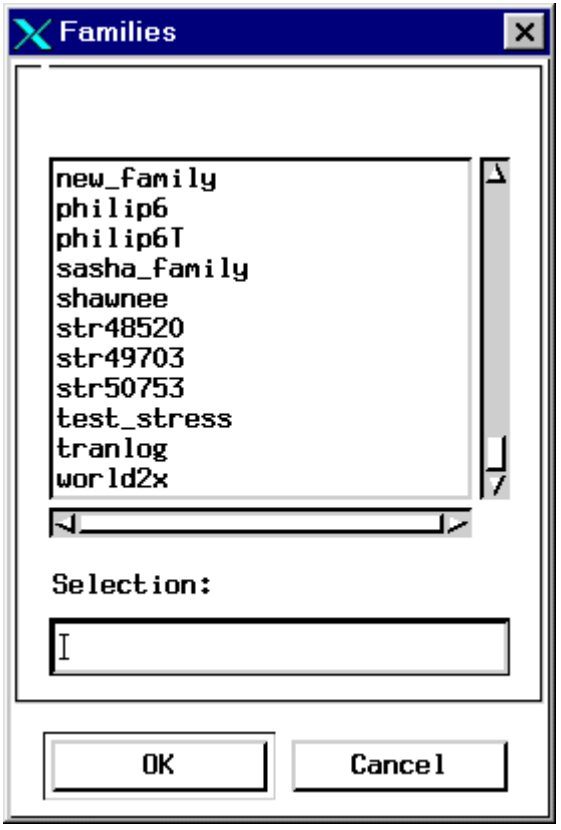
Important If you are creating an identical family as the source system (not required for multi-committal systems), use the same settings as the source.

Server types Perform the steps in this section on these servers:

Root server and all compatible servers. Compatible servers cannot have overlapping Document ID numbers or conflicting Disk (surface) ID numbers.

1. From the Applications Executive main window, select the Applications pull-down window followed by Database Maintenance.
2. From the Database Maintenance screen, select the Families pull-down menu followed by Define/Update Family.
3. When the Define/Update Media Families screen displays, click **List** to display a list of media families.

4 You may select an existing family by clicking on a listed family name or you may create a family by entering a new family name in the selection field. Click **OK** when you're done.



5 The Define/Update Media Families screen appears with the name of your family in the Family Name field. If you selected an existing family, there will be a value in the Disk Size field.

6 If you are creating a new family, click the down arrow button next to the Disk Size field to select a size.

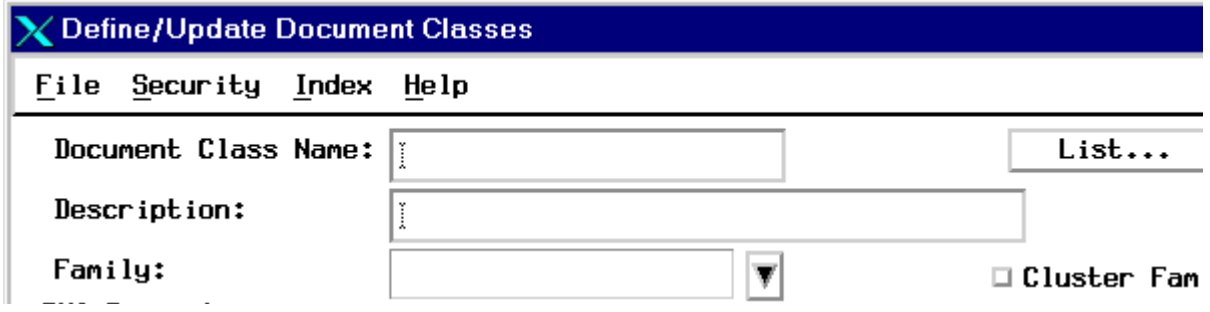
7 Complete the remaining steps pertaining to primary/tranlog selection, etc. Click the OK buttons on any confirmation messages. When finished, select the File pull-down menu followed by Exit. Click the OK button on any confirmation messages. The Database Maintenance will appear. Do NOT exit from Database Maintenance.

Verify/configure document class on the target system

This section involves the creation (or verification) of a document class for multi-committal.

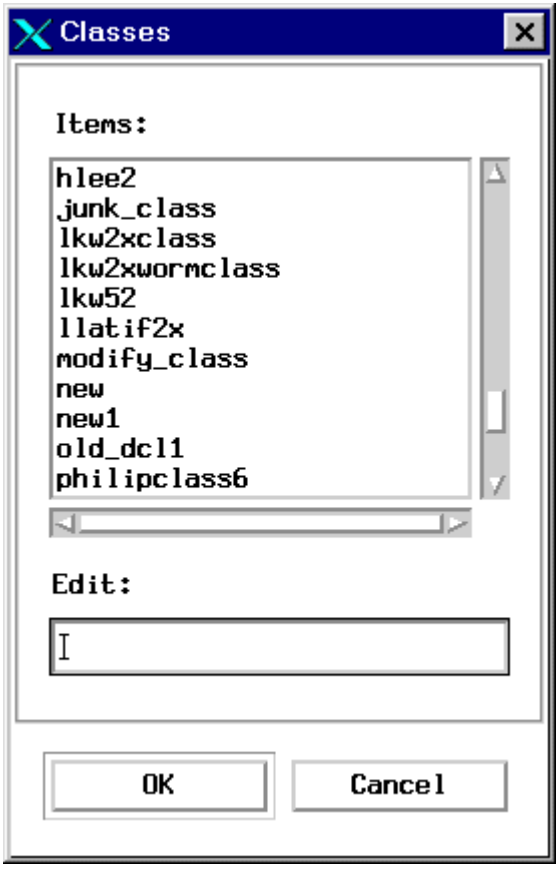
Important If you are creating an identical document class as the source system (not required for multi-committal systems), use the same settings as the source.

1 From the Database Maintenance screen, select the Classes pull-down menu followed by Define/Update Class to display the Define/Update Document Classes screen.



2 Click the **List** button located next to the Document Class Name field. You will see a list of available document classes as well as a field for entering a new document class

.



3 Click on an existing class or enter the name of a new document class in the Edit field. Click **OK**.

4 The Define/Update Document Classes screen appears. If you are creating a new class, all the fields will be blank.

   Click the down arrow button next to the Family field to retrieve a list of available families. Click on the family you created earlier.

5 Add indexes and security parameters as needed to this document class. The index names and index security on the source and target server need not match.

6 Fill out the rest of the required information to complete the document class creation.

7 When finished with the document class parameters, click the **File** pull-down menu followed by **Save**. Click on the confirmation messages. Click on **File** again followed by **Exit**.

8 From the Database Maintenance screen, click on the **Miscellaneous** pull-down menu followed by **Exit**. You should be in the command line mode on the target system.

Test the multi-committal configuration

For information on scheduling committal processes, see **Chapter 4, "Scheduling system committals," on page 107**.

When the FileNet software has started successfully, the system is ready to run. Test the system by entering, committing, and retrieving several documents to make sure they've been committed on the appropriate systems.

Return to production mode

The upgrade is finished and you can restart the FileNet Image Services software and return your FileNet system to normal operation.

4

Scheduling system committals

This chapter describes how you can schedule cross-committals (bes_commit) and multi-committals (rmt_commit). This feature allows you to select specific times and days for processing committals of batches or documents. You may want to schedule this activity during non-peak hours. For example, if the network traffic is heavy between the hours of 8:00am and 5:50pm weekdays, you can schedule the committal operation outside these peak hours of operation.

Important When you use this scheduling feature, committals for documents scanned during peak hours may be delayed. In addition, you may need to increase the transient database and cache space to accommodate the backlog of transient data.

FileNet Image Services reads the scheduling file from the following location:

UNIX **/fnsw/local/sd/sched_conf** (UNIX platforms)

WIN **<FNSW_drive>:\fnsw_loc\sd\sched_conf** (Windows platforms)

This is an ASCII text format file that you generate. If this file does not exist, no scheduling will take place to disable the daemon processes.

If column one has the following characters, that line will be skipped:

 # Comment line

0 NULL

\n New line

All key tokens will start at column one of each new line. The key token will be the name of the committal daemon to be scheduled. There are two supported daemon tokens (not case sensitive and always starting at column one):

Bes_commit

Rmt_commit

Following the daemon token indicator is the mandatory start and end time. The start and end time will have following format:

Hh:mm - The two digit hour in military time.

When the start time you specify is later in the day than the end time, processing will occur from 00:00 to the end time and from start time to 24:00. See the example below.

Following the end time indicator is the optional three character day of the week indicator (SUN, MON, TUE, WED, THU, FRI, SAT). If no day indicator is present, then the schedule will be followed every day of the week. The day indicator entries will supersede the non-day entries.

For example, you can use the following entries if you want to follow one schedule Monday through Saturday and a different schedule for Sunday. Sunday's schedule supersedes the base schedule. In the following example bes_commit will not run between 8:00am to 5:30pm Monday through Saturday and will run continuously on Sunday:

Bes_commit 17:30 08:00

Bes_commit 00:00 24:00 SUN

The following is an example of the schedule file:

```
#
#       bes_commit
#

#
# Weekday schedule start time is 5:30pm and stop time is 8:00am
# bes_commit will not process batches between 8:00am and 5:30pm
#
#

bes_commit 17:30 08:00

#
# Saturday half day schedule
#   Start time is 12:00 (noon) and End time is 8:00am
#   bes_commit will not process batches from 8:00am to 12:00 noon
#

bes_commit 12:00 08:00 SAT

#
```

```
# Sunday schedule
#   Start time is 8:00am and end time 5:00pm
#   bes_commit will run 8:00am to 5:00pm.  bes_commit will not process
#   requests between 00:00 to 8:00am and between 5:00pm to 12:00
#   midnight
#

bes_commit 08:00 17:00 SUN
#
#
#  rmt_commit schedule
#
#
# Sunday schedule 24 hour processing
#
rmt_commit 00:00 24:00 SUN
#
# Monday schedule 5:00pm-12:00 midnight
#
rmt_commit 17:00 24:00 Mon
#
# Tuesday schdule
#   Start time is 8:00am and end time 5:00pm
#   rmt_commit will run 8:00am to 5:00pm.  rmt_commit will not process
#   requests between 00:00 to 8:00am and between 5:00pm to 12:00
#   midnight
#
rmt_commit 08:00 17:00 TUE
#
# Wednesday through Saturday are unscheduled so rmt_commit will process
# requests all day
#
```

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