INSTALLATION

Before you begin

1) Use these instructions if you are installing a new instance of Spool Organizer/400. If you are updating your existing Spool Organizer/400 instance to a new release refer to the document **"SpoolOrganizer/400 Update Instructions"** provided with the update package.

2) A permanent or temporary password is needed once Spool Organizer is installed. If you have already have an instance of Spool Organizer running on this or any other LPAR within this CPU, you can use its permanent password for this instance. Otherwise you will need to contact Broderick Data Systems for a temporary or permanent password. If you plan to install Spool Organizer after business hours, you may wish to call Broderick Data Systems in advance to get your password.

3) If you already have an instance of Spool Organizer running on this LPAR, or you have one of our other products installed on this LPAR, and they are not compatible with this release of Spool Organizer, you will need to update them **before** installing this instance. Refer to Appendix L, Release Compatibility for more information. Failure to do so could cause other BDS software to stop working after this instance is installed.

4) If you plan to install more than one instance of Spool Organizer on this LPAR, or you plan to install Spool Organizer onto APSs other than the System ASP (ASP 1), refer to Appendix K, "ASP Considerations" prior to performing the install.

Prerequisites

The following hardware and system software is needed to execute SpoolOrganizer/400. Please ensure that all needed system software is installed before beginning the installation.

AS/400:

+ OS/400 Version 6, Release 1, Modification 0 or greater
+ Security level 40 or less

To create encrypted PDF attachment files in email messages:

- Cryptographic Access Provider for AS/400 (57xx-AC3)

Decrypt files:

To decrypt SpoolOrganizer encrypted PDF attachment files in email messages:

+ Windows 2000, Windows XP, Windows 2003, or Windows 7 or later
+ DotNet Framework 1.1 or greater

Installation

1) Sign on as **QSECOFR**

Note: The installation procedures below will end and change subsystem **BDS**. You must insure the applications using subsystem **BDS** (for example Remote SpoolPrint3X/400, File Transfer3X/400, etc.)

can be stopped before per forming the installation.

2) Restore the install routines from the media.

Mount the media and enter one of the following:

If you are using Tape:

RSTOBJ OBJ(BSOIN*) SAVLIB(SPOR40) DEV(xxxxxx) VOL(*MOUNTED) RSTLIB(QTEMP)

If you are using CD-ROM:

RSTOBJ OBJ(BSOIN*) SAVLIB(SPOR40) DEV(OPT01) VOL(BDS) RSTLIB(QTEMP) OPTFILE(SPOR40)

If you are using a Save file:

You should have a save file containing the Spool Organizer media. Verify the contents and note the library saved:

DSPSAVF FILE(mylib/myfile)

The library saved should be **SPOR40**.

Restore the install objects from the save file containing library **SPOR40** into library QTEMP:

RSTOBJ OBJ(BSOIN*) SAVLIB(SPOR40) DEV(*SAVF) SAVF(mylib/myfile) RSTLIB(QTEMP)

3) Execute the install procedure. Enter one of the following:

Note: If you are planning to install Spool Organizer into ASPs other than the system ASP (ASP 1), refer to Appendix K, "ASP Considerations" to determine the values for the xxxASP and xxxASPDEV parameters on the following BSOINS command. Refer to the command help text for more information regarding the xxxASP and xxxASPDEV parameters.

Note: If you are planning to install Spool Organizer into an IASP, verify that the IASP device's status is **AVAILABLE**. Use the command WRKCFGSTS CFGTYPE(*DEV) CFGD(your-IASP-dev).

If you are using Tape or CD-ROM (Press F4 to prompt):

QTEMP/BSOINS DEV(xxxxx)

If you are using a Save file (Press F4 to prompt):

QTEMP/BSOINS DEV(*SAVF) PGMSAVF(mylib/myfile)

INSTALLATION

Enter the save file containing library **SPOR40** for mylib/myfile.

You will receive the message “Installation of SpoolOrganizer complete”. You may need to call Broderick Data Systems to activate your 30 day trial package.

4) Access the BDS Software Server (optional).

Note: Your AS/400 must be connected to the Internet to perform this procedure.

a) If you have not done so previously, access the tailoring options screen:

BRODERICK/BSOSETUP

b) Note the fields “BDS Access Userid” and “Password”. You will need a user ID and password to access some of the server options. If needed, contact BDS administration to get this information. If you add your user id and password, press **ENTER** to enter them and re-enter the setup command.

c) Press F14, E-Comm. The Software Server display will appear. Take note of the options available to you. When you are finished, press F3 to exit

Continue with the section "Planning Guide".

Note: Appendix B, “Setup Examples” is a tutorial which demonstrates all the major components of SpoolOrganizer and how they fit together. It is strongly recommended that the administrator perform the examples in Appendix B.

Planning Guide

Certain actions should be performed before starting Monitors, the Bundle Manager or the Index Manager. The administrator should use this section as a guide when planning for the setup of SpoolOrganizer. Setup examples are included in the appendices.

Planning involves the following major areas :

Spool Processing

+ Determine Outqs to be monitored
+ Group spool entries by processing option.
+ Determine Users and their authorities
+ Group spool entries so archive media usage is optimized

Report Distribution (Bundling)

+ Determine users that want their spool entries bundled
+ Define the spool entries to be bundled

+ Determine which outqs the spool entries will appear
+ Determine when/where the users want their Bundles printed

Indexing

+ Identify the spool entries to be indexed
+ Determine which values in each spool entry to collect for the index
+ Determine users that want to search indexes

Follow the steps listed below to plan your installation:

Spool Processing

1) Determine which outqs you wish to monitor using SpoolOrganizer (Source Outq's).

2) For each source outq, group expected spool entries so that each entry in the group has the same processing options:

+ Target Outq (Outq, Outq Distribution List, or Delete)

+ E-mail specification (to address, etc.)

+ Amount of time the spool entry is to be kept in the on-line database (if at all), and the amount of time the entry is to remain in the Archive Catalog.

+ The user profiles which can display, and change the spool entry.

3) For each group identified, specify attributes which will uniquely identify the spool entry(s). Use the following attributes as possible Selection Criteria:

+ **Job Name**
+ **Job User**
+ **Spool File Name**
+ **Spool File Number**
+ **Form Name**
+ **User Data**
+ **Group Profile Name of Job User**

You will use the above plans to create Monitor descriptions and Selection Criteria Specifications.

4) Determine the users which are to be able to use the system. Determine the type (security officer, administrator, or user), and the spool entries allowed to display or change.

You will use the above plans to create Spool Organizer User ID's.

5) Determine which archive tapes will contain certain spool entries. For example: all joblogs may be placed on the same tapes. Organizing archive media in this fashion will make searching for an archived entry much easier. Determine the entries to group together, and the amount of time to keep a

tape active.

Note: Appendix B, "Setup Example" has a step by step example of setting up Spool Organizer to process spool entries. It will walk the user through each of the above planning steps.

Report Distribution (Bundling)

1) Make a list of each user which wants Bundles of Spool Entries. List each bundle for the user separately.

2) For each Bundle defined above, list each spool entry which will be contained in the Bundle. Determine the following for each spool entry:

+ Attributes: Job name, Job user, Spool File name, etc. These attributes describe the spool entry to the Bundle Manager.

+ Label the spool entry as required or optional to the Bundle.

3) Determine the outq the spool entry currently appears in. A SpoolOrganizer Monitor is required to monitor these outqs, and pass the requested spool entries to the Bundle Manager. Please note that you may already have defined Monitors to perform the Spool Processing Options described above.

4) For each Bundle determine where/when you want it printed. Write down the outq to print into, and the time you want it printed.

You will use the above plans to create Bundle Descriptions

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Note: Appendix B, "Setup Examples" has a step by step example of setting up Spool Organizer Bundles. It will walk the user through each of the above planning steps.

Indexing

1) Identify each spool entry which contains data to be indexed. You will use this information to define Monitors and Selection Specs for each Spool Entry. A Monitor is required to monitor these outqs, and pass the requested spool entries to the Index Manager. Indexing uses Selection Specs to tell the Monitor which spool entries to pass to the Index Manager. Please note that you may use existing Monitors and Selection Specs for Indexing.

2) Determine the values in each spool entry to collect for indexes. Determine for each set of values the following:

+ data type (character or numeric)
+ location on the page (row/column range)
+ values to collect (all values, certain ranges, etc.)

You will use the above plans to create Index Specifications.

3) Determine the users which will search the Indexes. Determine which users are authorized to

display each spool entry defined in step 1), and which indexes they will search.

You will use the above plans to create Spool Organizer Users and optionally Index Stored Search Specs.

Note: Appendix B, "Setup Examples" has a step by step example of setting up Spool Organizer Indexing. It will walk the user through each of the above planning steps.