

EDMSuite OnDemand



User's Guide

Version 2.2

EDMSuite OnDemand



User's Guide

Version 2.2

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Contents

Notices	v
Trademarks and Service Marks	v
About this publication	ix
Who should use this publication	ix
How to use this guide	x
About operating environments	x
Before you begin working with	
OnDemand	x
How this publication is organized	x
Product support	xi
OnDemand documentation	xi

Part 1. Installation 1

Chapter 1. Before you begin	3
Installation notes	3
Installing Adobe software	4
OS/2 software	4
Windows software	4

Chapter 2. Installing for OS/2	7
System requirements	7
Hardware	7
Software	7
Memory.	7
Disk space	7
Installing the client	8
Running Install	8
To install on a user's PC	8
To install on a network file server	9
To use automated install	9
To map AFP fonts	9
To use Uninstall	10

Chapter 3. Installing for Windows 3.1	11
System requirements	11
Hardware	11
Software	11
Memory.	11
Disk space	11
Installing the client	12
Running Setup	12
To install on a user's PC	12

To install on a network file server	13
To use automated install	13
To map AFP fonts	14
To use Uninstall	14

Chapter 4. Installing for Windows 95, Windows 98, and Windows NT	15
System requirements	15
Hardware	15
Software	15
Memory.	15
Disk space	15
Installing the client	16
Installing from Autorun	16
Running Setup	17
To install on a user's PC	17
To install on a network file server	18
To use automated install	18
To install user-defined files	18
To map AFP fonts	18
To use Uninstall	19

Part 2. About OnDemand 21

Chapter 5. Introducing OnDemand	23
Overview	23
OnDemand documents.	24
OnDemand folders	24
The OnDemand system	24

Chapter 6. Related IBM EDMSuite Products	27
ImagePlus VisualInfo	27
ContentConnect	27
MQSeries Workflow (formerly FlowMark)	28
Domino Doc	28

Part 3. Getting started 29

Chapter 7. Getting Help	31
Getting task Help	31
Getting Help for windows	31
Getting Help for menu commands	31
Using the Help index	31

Chapter 8. Starting the OnDemand client	33
Starting from the desktop	33
Starting the OS/2 client	33
Starting the Windows 3.1 client	34
Starting from the Start menu	34
Starting from the Run dialog box	34
 Chapter 9. Logging on to a server	 37
 Chapter 10. Opening folders	 39
 Chapter 11. Searching for documents	 41
Overview	41
Searching for documents	42
 Chapter 12. Working with documents	 45
Overview	45
Selecting documents for viewing	47
Working with more than one document	48
Viewing documents	49
Moving to pages in a document.	49
Finding information in a document	50
Annotating a document	51
 Chapter 13. Ending your OnDemand session.	 53
Closing documents	53

Closing folders	53
Logging off a server.	54
Stopping OnDemand	54

Part 4. Appendixes 55

Appendix A. Startup parameters	57
Changing startup parameters.	58

Appendix B. Updating server information	59
Updating information for TCP/IP servers	59
Adding a TCP/IP server	59
Changing a TCP/IP server	60
Updating information for local servers	61
Adding a CD-ROM server	61
Adding a network or hard drive server	62
Changing a local server	62
Deleting a server.	63

Glossary	65
-----------------	-----------

Index	67
--------------	-----------

Readers' Comments — We'd Like to Hear from You	71
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About this publication

Welcome to the IBM EDMSuite OnDemand Version 2.2 (OnDemand) client. You can use the client to access OnDemand servers and search, retrieve, view, and print documents¹ (and much more).

This publication explains how to get started with the OnDemand client, use the client to search for documents, and do other basic tasks with documents.

This publication covers OnDemand client programs that run under OS/2, Windows 3.1, Windows NT, Windows 95, and Windows 98. All the client programs provide the same basic functions. (That is, Logon, Open Folders, Search, Retrieve, View, and Print.) You do the basic tasks the same way. (Opening a folder with the OS/2 client works the same way with the Windows NT client.) There may be minor differences in how the client programs look. The screens in this publication show a client that runs under Windows NT. The look of the client program on your system may be slightly different.

Note: This publication is based on and replaces *Getting Started with the OS/2 Client*, S544-5510, *Getting Started with the Windows 3.1 Client*, S544-5509, *Getting Started with the Windows NT/95/98 Client*, S544-5469, and *Installation Guide for OnDemand Clients*, G544-5527.

Who should use this publication

This publication is of primary interest to people who use OnDemand to search for, retrieve, and view documents. This publication introduces you to the basic features of the OnDemand client. For more information about the tasks that are described in this publication, please see the online Help when using the client. The online Help also contains details about the other things you can do with the client.

1. In this publication, the term *document* refers to a segment of a report, such as a statement, policy, or other logical grouping of pages. A *report* is a data object to be stored in OnDemand. A 10,000-page telephone bill and a two-page Lotus WordPro file are both reports to OnDemand. However, on some systems, documents and reports may be one and the same.

How to use this guide

This *User's Guide* introduces you to the basic features of the OnDemand client. To use the client, your PC must communicate with an OnDemand server over a network. Please see your OnDemand administrator for information about the server that contains the documents you need. Your OnDemand administrator can also verify that you have the correct operating environment and other information needed to use OnDemand.

About operating environments

This publication covers the clients that run on OS/2, Windows 3.1, Windows NT, Windows 95, and Windows 98 systems.

To gain the full benefits of OnDemand, first familiarize yourself with the system you plan to use. This publication assumes that you are familiar with the system environment and uses terminology specific to these systems. For help with your system, refer to your system documentation and the online Help.

Before you begin working with OnDemand

Before you start the client and begin working with documents, we recommend the following:

- Familiarize yourself with your system and using a pointing device.
- Familiarize yourself with the OnDemand work space. When you start OnDemand, the main window appears. The main window is where you open folders, search for documents, and work with documents.
- Review “Part 3. Getting started” on page 29. It contains information about the basic tasks you can perform with OnDemand. A glossary of terms that you will encounter when using OnDemand begins on page 65.
- Install the OnDemand client program. For more information about hardware and software requirements and installing the client, see “Part 1. Installation” on page 1.
- Find the name of your OnDemand server and your OnDemand userid and password.
- Find the name of the folder that contains the documents you need.
- Determine the best way to start the OnDemand program. For more information, see “Chapter 8. Starting the OnDemand client” on page 33.

How this publication is organized

This book contains the following sections:

- “Part 1. Installation” on page 1 describes the hardware, software, memory, and disk space requirements for the OnDemand client and how to install the client.
- “Part 2. About OnDemand” on page 21 provides an overview of OnDemand, the OnDemand operating environment, and some of the products that are related to OnDemand.
- “Part 3. Getting started” on page 29 shows how to do some of the basic OnDemand tasks.
- “Glossary” on page 65 contains a glossary of terms that are used in OnDemand.

Product support

The IBM Support Center maintains current information about OnDemand, including program temporary fixes (PTFs).

Before you install OnDemand, contact the IBM Support Center or your IBM software service representative to obtain the latest maintenance level of OnDemand.

If you encounter problems or errors running any of the OnDemand programs, you can call the IBM Support Center to obtain software problem and defect support. The phone number for the IBM Support Center is 1-800-237-5511. The OnDemand program number is 5622-622 for AIX, 5765-D60 for HP-UX, 5765-E20 for Solaris, and 5639-E12 for Windows NT. The OnDemand component ID is 5622-66200.

OnDemand documentation

The following publications contain information about OnDemand Version 2.2:

Introduction and Planning Guide, G544-5281

Installation and Configuration Guide for UNIX Servers, G544-5598

Installation and Configuration Guide for Windows NT Servers, G544-5526

Administrator's Reference, S544-5293

Indexing Reference, S544-5489

Getting Started with the Administrative Client, S544-5463

User's Guide, SC26-9810

OS/2 Client Customization Guide, S544-5465

OLE Control and Win32 Client Customization Guide and Reference, S544-5466

Part 1. Installation

Chapter 1. Before you begin

Installation notes

To view documents that require Adobe Type 1 Fonts, ATM must be installed and running on the PC. OnDemand provides ATM software on the client CD-ROM. We recommend that you install the ATM software that is provided with OnDemand **before** you install the client software on the PC. See “Installing Adobe software” on page 4 for information about installing ATM.

To view PDF documents that are stored in OnDemand, you need Adobe Acrobat software. See “Installing Adobe software” on page 4 for information about obtaining and installing Adobe Acrobat software.

You can install OnDemand client software in several ways:

- **Standard Install.** Use to install the OnDemand client to a hard disk on your PC. To run a standard install, select the Typical option from the Setup program (Windows) or run the Install program from the Local directory (OS/2).
- **Node Install.** Use to configure your PC to run a copy of the OnDemand client from a shared location on a network file server. To run a node install, select the Compact option from the Setup program (Windows) or run the Install program from the Net directory (OS/2).
- **Custom Install.** Use to choose the components you want to install. You must use the custom install if you need to install:
 - The administrative client on a PC
 - The OnDemand client in a language other than the default language that is set on the PC
 - The Sonoran Fonts on the PC

To run a custom install, select the Custom option from the Setup program (Windows) or run the Install program from the Local directory (OS/2). Then select the components to install.

OnDemand also supports *distribution* and *multiple user* installs:

- Use a distribution install to copy the OnDemand client software from the CD-ROM to a shared location on a network file server. After copying the software to the server, other users can run subsequent standard, node, and custom installs from the server.

- Use a multiple user install to install an OnDemand client to a shared location on a network file server. After installing the client on the server, other users can run a node install to configure their PCs to run the client from the server.

For more information about distribution and multiple user installs, see the ARSNET.PDF file on the OnDemand client CD-ROM. To read or print this information, you need Adobe Acrobat software. See “Installing Adobe software” for information about obtaining and installing Adobe Acrobat software.

Installing Adobe software

OS/2 software

ATM is part of the base OS/2 operating system. OnDemand does not provide ATM for OS/2 on the client CD-ROM.

You need the Acrobat Reader for OS/2 Warp to view the OnDemand publications in PDF format or to view PDF documents that are stored in OnDemand. You can obtain the free Acrobat Reader for OS/2 Warp from the Adobe web site:

<http://www.adobe.com>

Download the installation file, then follow the link to the installation instructions. You may want to print the installation instructions for future reference.

Follow the installation instructions to install Acrobat Reader for OS/2.

Windows software

OnDemand provides the following Adobe software on the client CD-ROM:

- ATM 3.02 for Windows 3.1
- ATM 4.0 for Windows 95, Windows 98, and Windows NT
- Acrobat Exchange 3.0 for Windows 3.1, Windows 95, Windows 98, and Windows NT

Installing ATM for Windows 3.1

To install ATM Version 3.02 for Windows 3.1, follow these steps:

1. If an earlier version of ATM exists on the PC, you must remove ATM as the system driver before you run the Install program. To do so:
 - a. Make a backup copy of the SYSTEM.INI file.

- b. Edit the SYSTEM.INI file.
 - c. Change the statement `system.drv=atmsys.drv` to `system.drv=system.drv`.
 - d. Change the statement `atmsys.drv=system.drv` to `;atmsys.drv=system.drv`.
 - e. Save and close the file.
 - f. Restart Windows.
2. Place the OnDemand client CD-ROM in your CD-ROM drive.
 3. Select Run from the File menu.
 4. In the Command Line field, type `x:\adobe\windows\atm302\install` (where x is the letter of your CD-ROM drive).
 5. Press Enter.
 6. Follow the installation instructions on the screen.

Installing ATM for Windows 95 or Windows 98

To install ATM Version 4 for Windows 95 or Windows 98, follow these steps:

1. Place the OnDemand client CD-ROM in your CD-ROM drive.
2. From the Windows taskbar, click Start, and then choose Run.
3. Type `x:\adobe\windows\atm40w95\install` (where x is the letter of your CD-ROM drive).
4. Press Enter.
5. Follow the installation instructions on the screen.

Installing ATM for Windows NT

To install ATM Version 4 for Windows NT, follow these steps:

1. Place the OnDemand client CD-ROM in your CD-ROM drive.
2. From the Windows taskbar, click Start, and then choose Run.
3. Type `x:\adobe\windows\atm40nt\setup` (where x is the letter of your CD-ROM drive).
4. Press Enter.
5. Follow the installation instructions on the screen.

Installing Acrobat Exchange for Windows

You need Adobe Acrobat software to view the OnDemand publications in PDF format or to view PDF documents that are stored in OnDemand. We recommend that you use the Adobe Acrobat software that is provided on the OnDemand client CD-ROM (Acrobat Exchange).

To install Acrobat Exchange for Windows, follow these steps:

1. Place the OnDemand client CD-ROM in your CD-ROM drive.
2. Run the Setup program from the x:\adobe\windows\exch30 directory, where x is the letter of your CD-ROM drive.
3. Follow the installation instructions on the screen.

Chapter 2. Installing for OS/2

System requirements

This section describes the hardware, software, memory, and disk space requirements for installing and using the OnDemand OS/2 client.

Hardware

The OnDemand client requires the following hardware:

- An IBM Personal Computer or compatible (486 or faster)
- A super-VGA display and adapter with a minimum resolution of 800x600
- Physical connection to the network, such as a Token Ring or Ethernet network adapter
- A CD-ROM drive for installation (optional, if you plan to install the OnDemand client from a network file server)

Software

To install or use the OnDemand client, OS/2 Version 3.0 or OS/2 Warp Connect must be running on your PC. To install the OnDemand client from a CD-ROM, the CD-ROM drivers must be installed on your PC. To install the OnDemand client from a network file server, the appropriate network software must be running on your PC. To access an OnDemand server, TCP/IP must be running on your PC. For OS/2 Version 3.0, use the IBM OS/2 TCP/IP Version 2.0 Base kit. For OS/2 Warp Connect, use the standard TCP/IP support for OS/2 Warp Connect.

Memory

The OnDemand client requires at least 16 MB of memory. Your PC may need more memory if you plan to work with more than one document at a time. Your PC may also need more memory if you run more than one program at the same time.

Disk space

To install the OnDemand client, disk space requirements depend on the features you select.

You need at least 50 MB of available disk space to install all of the OnDemand features. To use less than 50 MB of disk space, select only the features you need on the Installation Directories dialog box in Install.

You should also plan to allot space for temporary files. IBM recommends that you have 50 MB of available disk space for temporary files.

For more information on disk space requirements for each OnDemand feature, follow these steps:

1. Insert the OnDemand client CD-ROM in the appropriate drive.
2. From an OS/2 prompt, type `x:\client\os2\local\install` (where x is the letter of your CD-ROM drive).
3. Follow the instructions on the screen until you reach the Installation Directories dialog box.
4. In this dialog box you can select each component individually and then click Change to see all the specific features and their disk space requirements.

Installing the client

The Install program transfers OnDemand client files from the CD-ROM to your PC.

You can run the Install program from the **local** directory or the **net** directory:

- The Install program in the **local** directory installs the client to a hard disk on the your PC.
- The Install program in the **net** directory configures your PC to run the client from a shared location on a network file server. You must specify the location of the OnDemand client files on a network file server (the Network Code Directory). You must also specify the location of a work directory on your PC (the Local Directory).

You can install all of the OnDemand features at once, or individual features as you need them.

Running Install

When you run the Install program, the Install screens show the names of the OnDemand client directories where files are placed.

Information about network installations (distribution and multiple user installs) is available on the CD-ROM in the ARSNET.PDF file. To read or print this information, see “To install on a network file server” on page 9.

To install on a user's PC

To install from the CD-ROM or to install from a network file server, follow these instructions:

1. Insert the CD-ROM in the appropriate drive or obtain the drive letter of the network drive that holds the OnDemand software.
2. From an OS/2 prompt, type `x:\client\os2\local\install` (where x is the letter of your CD-ROM drive or the network drive).

Note: To configure the PC to run the client from a network file server, run the Install program from the `\client\os2\net` directory. However, an administrator must install the client to a hard disk on the network file server before you can run it from that location.

3. Click Continue, and then click OK.
4. On the Installation Directories dialog box, select the components you want to install.
5. Use the Disk Space command to install the files to a different hard disk.
6. Click Install.

To install on a network file server

Information about network installations (distribution and multiple user installs) is available on the CD-ROM in the ARSNET.PDF file. To read or print this information, you need Adobe Acrobat software. See “Installing Adobe software” on page 4 for information about obtaining and installing Adobe Acrobat software.

To use automated install

Automated install allows administrators to standardize the OnDemand installation for all users in an organization. It also allows administrators to install OnDemand client software without requiring users to be at their PCs. To read more about automated install, see the ARSAUTO.PDF file on the CD-ROM. To read or print this information, you need Adobe Acrobat software. See “Installing Adobe software” on page 4 for information about obtaining and installing Adobe Acrobat software.

To map AFP fonts

To view AFP documents, you may need to map the AFP fonts your documents were created with to fonts that can be displayed on the PC. That way, OnDemand can display the documents and fonts correctly. You should map AFP fonts if your documents use:

- AFP fonts that are not defined to OnDemand
- IBM AFP fonts that you or others in your organization have changed
- AFP fonts that you or others in your organization have created

To read more about mapping AFP fonts, see the ARSFONT.PDF file on the CD-ROM. To read or print this information, you need Adobe Acrobat software. See “Installing Adobe software” on page 4 for information about obtaining and installing Adobe Acrobat software.

To use Uninstall

The Uninstall feature lets you remove the OnDemand client from your PC. Uninstall removes the directories for OnDemand and any references to OnDemand in system files.

To run Uninstall

1. Insert the CD-ROM in the appropriate drive or obtain the drive letter of the network drive that holds the OnDemand software.
2. From an OS/2 prompt, type `x:\client\os2\local\install` (where x is the letter of your CD-ROM drive or the network drive).
3. Press the Enter key.
4. Select Delete the installed product and re-install.
5. Click Continue.
6. Select the components you want to uninstall.
7. Click Delete.

Chapter 3. Installing for Windows 3.1

System requirements

This section describes the hardware, software, memory, and disk space requirements for installing and using the OnDemand client.

Hardware

The OnDemand client requires the following hardware:

- An IBM Personal Computer or compatible (486 or faster)
- A super-VGA display and adapter with a minimum resolution of 800x600
- Physical connection to the network, such as a Token Ring or Ethernet network adapter
- A CD-ROM drive for installation (optional, if you plan to install the OnDemand client from a network file server)

Software

To install or use the OnDemand client, Microsoft Windows 3.1 must be running on your PC. To install the OnDemand client from a CD-ROM, the CD-ROM drivers must be installed on your PC. To install the OnDemand client from a network file server, the appropriate network software must be running on your PC. To access an OnDemand server, a Windows-compatible TCP/IP socket program must be running on your PC. We recommend that you use the IBM TCP/IP for DOS Version 2.1.1 product.

Memory

The OnDemand client requires at least 16 MB of memory. Your PC may need more memory if you plan to work with more than one document at a time. Your PC may also need more memory if you run more than one program at the same time.

Disk space

To install the OnDemand client, disk space requirements depend on the features you select.

You need at least 50 MB of available disk space to install all of the OnDemand features. To use less than 50 MB of disk space, use the Installation Components and Subcomponents option in Setup to select only the features you need.

You should also plan to allot space for temporary files. IBM recommends that you have 50 MB of available disk space for temporary files.

For more information on disk space requirements for each OnDemand feature, start Setup from the CD-ROM, or follow the Setup steps below:

1. Insert the CD-ROM in the appropriate drive.
2. From the Windows taskbar, click Start, and then choose Run.
3. Type `x:\client\windows\win16\setup` (where x is the letter of your CD-ROM drive).
4. On the Setup Type and Working Directory dialog box, select Custom.
5. On the Installation Components and Subcomponents dialog box you can select each component individually and then click Change to see all the specific features and their disk space requirements.

Installing the client

The Setup program transfers the OnDemand client files from the CD-ROM to each user's PC.

You can install all of the OnDemand features at once, or individual features as you need them.

Running Setup

When you run the Setup program, the Setup screens show you the names of the OnDemand directories so that you know where files will be placed.

Information about network installations (distribution and multiple user installs) is available on the CD-ROM in the ARSNET.PDF file. To read or print this information, see "To install on a network file server" on page 13.

To install on a user's PC

To install from the CD-ROM or to install from a network file server, follow these instructions:

1. Insert the CD-ROM in the appropriate drive or obtain the drive letter of the network drive that holds the OnDemand software.
2. From the Windows taskbar, click Start, and then choose Run.
3. Type `x:\client\windows\win16\setup` (where x is the letter of your CD-ROM drive or the network drive).
4. Click OK.
5. After the Setup program starts, click Next to continue.

6. On the Setup Type and Working Directory dialog box, choose the type of installation:
 - Select **Typical** to install a copy of the OnDemand client to the hard disk on the user's PC. If ATM is on the PC, the Setup program will copy the Outline Fonts to the PSFONTS directory on the PC. The Setup program runs a Typical install by default unless you select the Compact or Custom option.
 - Select **Compact** to configure the PC to run a copy of the OnDemand client from a shared location on a network file server or from the product CD-ROM. After selecting Compact, you must identify the full path of where the OnDemand client program files reside on the network file server (or product CD-ROM). If ATM is on the PC, the Setup program will copy the Outline Fonts to the PSFONTS directory on the PC.
 - Select **Custom** to choose the components to install on the PC. You must select Custom:
 - To install the administrative client on a PC
 - To install the OnDemand client in a language other than the default language set on the PC
 - To install the Sonoran Fonts on the PC
7. The Destination Folder shows the installation drive and directory. Use the Browse command to install the files to a different hard disk or directory.
8. Follow the instructions on the screen to complete the installation.

To install on a network file server

Information about network installations (distribution and multiple user installs) is available on the CD-ROM in the ARSNET.PDF file. To read or print this information, you need Adobe Acrobat software. See “Installing Adobe software” on page 4 for information about installing Adobe Acrobat software.

To use automated install

Automated install allows administrators to standardize the OnDemand installation for all users in an organization. It also allows administrators to install OnDemand clients without the presence of users at their PCs. To read more about automated install, see the ARSAUTO.PDF file on the CD-ROM. To read or print this information, you need Adobe Acrobat software. See “Installing Adobe software” on page 4 for information about installing Adobe Acrobat software.

To map AFP fonts

To view AFP documents, you may need to map the AFP fonts your documents were created with to fonts that can be displayed on the PC. That way, OnDemand can display the documents and fonts correctly. You should define AFP fonts in font definition files if your documents use:

- AFP fonts that are not defined to OnDemand
- IBM AFP fonts that you or others in your organization have changed
- AFP fonts that you or others in your organization have created

To read more about mapping AFP fonts, see the ARSFONT.PDF file on the CD-ROM. To read or print this information, you need Adobe Acrobat software. See “Installing Adobe software” on page 4 for information about installing Adobe Acrobat software.

To use Uninstall

The Uninstall feature lets you remove the OnDemand client from your PC. Uninstall removes the directories for OnDemand and any references to OnDemand in system files.

To run Uninstall

1. From Program Manager, open the OnDemand group.
2. Double-click Uninstall OnDemand.
3. Click Yes to continue.

Chapter 4. Installing for Windows 95, Windows 98, and Windows NT

System requirements

This section describes the hardware, software, memory, and disk space requirements for installing and using the OnDemand client.

Hardware

The OnDemand client requires the following hardware:

- An IBM Personal Computer or compatible (486 or faster)
- A super-VGA display and adapter with a minimum resolution of 800x600
- Physical connection to the network, such as a Token Ring or Ethernet network adapter
- A CD-ROM drive for installation (optional, if you plan to install the OnDemand client from a network file server)

Software

To install or use the OnDemand client, Microsoft Windows 95, Windows 98, or Windows NT 4.0 must be installed and running on your PC. To install the OnDemand client from a CD-ROM, the CD-ROM drivers must be installed on your PC. To install the OnDemand client from a network file server, the appropriate network software must be running on your PC. To connect to an OnDemand server, the standard TCP/IP support for Microsoft Windows 95, Windows 98, or Windows NT 4.0 must be running on your PC.

Memory

The OnDemand client requires at least 32 MB of memory. Your PC may need more memory if you plan to work with more than one document at a time. Your PC may also need more memory if you run more than one program at the same time.

Disk space

To install the OnDemand client, disk space requirements depend on the features you select.

You need at least 55 MB of available disk space to install all of the OnDemand features. To use less than 55 MB of disk space, use the Installation Components and Subcomponents option in Setup to select only the features you need.

You should also plan to allot space for temporary files. IBM recommends that you have 50 MB of available disk space for temporary files.

For more information on disk space requirements for each OnDemand feature, start Setup from the CD-ROM, or follow the Setup steps below:

1. Insert the CD-ROM in the appropriate drive.
2. From the Windows taskbar, click Start, and then choose Run.
3. Type `x:\client\windows\win32\setup` (where x is the letter of your CD-ROM drive).
4. On the Setup Type and Working Directory dialog box, select Custom.
5. On the Installation Components and Subcomponents dialog box you can select each component individually and then click Change to see all the specific features and their disk space requirements.

Installing the client

The Setup program transfers the OnDemand client files from the CD-ROM to each user's PC.

When you install OnDemand by using the CD-ROM, you can use the traditional installation method or Autorun.

You can install all of the OnDemand features at once, or individual features as you need them.

Installing from Autorun

If you are installing from a CD-ROM, when you put the OnDemand CD-ROM in the drive, Autorun automatically starts the Setup program.

To start Autorun manually

Autorun does not automatically start if OnDemand is installed on the PC or if you have turned off the autoplay feature in Windows.

To start Autorun manually:

1. Insert the CD-ROM in the appropriate drive.
2. From the Windows taskbar, click Start, and then choose Run.

3. Type `x:\autorun\autorun.exe` (where x is the letter of your CD-ROM drive).
4. Click OK.

Running Setup

When you run the Setup program, the Setup screens show the names of the OnDemand directories so you know where the files are being placed.

Information about network installations (distribution and multiple user installs) is available on the CD-ROM in the ARSNET.PDF file. To read or print this information, see “To install on a network file server” on page 18.

To install on a user's PC

To install using Autorun, put the OnDemand CD-ROM in the drive. Autorun automatically starts the Setup program.

To install from the CD-ROM without Autorun or to install from a network file server, follow these instructions:

1. Insert the CD-ROM in the appropriate drive or obtain the drive letter of the network drive that holds the OnDemand client software.
2. From the Windows taskbar, click Start, and then choose Run.
3. Type `x:\client\windows\win32\setup` (where x is the letter of your CD-ROM drive or the network drive).
4. Click OK.

After the Setup program starts, click Next to continue.

On the Setup Type and Working Directory dialog box, choose the type of installation:

- Select **Typical** to install a copy of the OnDemand client to the hard disk on the user's PC. If ATM is on the PC, the Setup program will copy the Outline Fonts to the PSFONTS directory on the PC. The Setup program runs a Typical install by default unless you select the Compact or Custom option.
- Select **Compact** to configure the PC to run a copy of the OnDemand client from a shared location on a network file server or from the product CD-ROM. After selecting Compact, you must identify the full path of where the OnDemand client program files reside on the network file server (or product CD-ROM). If ATM is on the PC, the Setup program will copy the Outline Fonts to the PSFONTS directory on the PC.
- Select **Custom** to choose the components to install on the PC. You must select Custom:

- To install the administrative client on a PC
- To install the OnDemand client in a language other than the default language set on the PC
- To install the Sonoran Fonts on the PC

The Destination Folder shows the installation drive and directory. Use the Browse command to install the files to a different hard disk or directory.

Follow the instructions on the screen to complete the installation.

To install on a network file server

Information about network installations (distribution and multiple user installs) is available on the CD-ROM in the ARSNET.PDF file. To read or print this information, you need Adobe Acrobat software. See “Installing Adobe software” on page 4 for information about installing Adobe Acrobat software.

To use automated install

Automated install allows administrators to standardize the OnDemand installation for all users in an organization. It also allows administrators to install OnDemand clients without the presence of users at their PCs. To read more about automated install, see the ARSAUTO.PDF file on the CD-ROM. To read or print this information, you need Adobe Acrobat software. See “Installing Adobe software” on page 4 for information about installing Adobe Acrobat software.

To install user-defined files

Administrators can store user-defined files in the OnDemand installation directory tree on a network file server. Any user-defined files stored there get copied to the PC when a user runs the Setup program from the server. To read more about installing user-defined files, see the ARSUDEF.PDF file on the CD-ROM. To read or print this information, you need Adobe Acrobat software. See “Installing Adobe software” on page 4 for information about installing Adobe Acrobat software.

To map AFP fonts

To view AFP documents, you may need to map the AFP fonts your documents were created with to fonts that can be displayed on the PC. That way, OnDemand can display the documents and fonts correctly. You should define the fonts in font definition files if your documents use:

- AFP fonts that are not defined to OnDemand

- IBM AFP fonts that you or others in your organization have changed
- AFP fonts that you or others in your organization have created

To read more about mapping AFP fonts, see the ARSFONT.PDF file on the client CD-ROM. To read or print this information, you need Adobe Acrobat software. See “Installing Adobe software” on page 4 for information about installing Adobe Acrobat software.

To use Uninstall

The Uninstall feature lets you remove the OnDemand client from your PC. Uninstall removes the directories for OnDemand and any references to OnDemand in system files.

To run Uninstall

1. From the Windows taskbar, click Start. Choose Settings, and then choose Control Panel.
2. Double-click Add/Remove Programs.
3. From the list, select OnDemand32.
4. Click Add/Remove.
5. Click OK.

Part 2. About OnDemand

Chapter 5. Introducing OnDemand

Welcome to EDMSuite OnDemand – a system designed to help you get control of information. You can use OnDemand for almost any process that can benefit from hard copy or microfiche replacement and fast access to information. OnDemand manages electronic archives of documents and searches for and retrieves documents. You use OnDemand to view documents, print and fax copies of documents or pages, and attach notes to documents.

Overview

OnDemand supports any organization that can benefit from hard copy or microfiche replacement and instant access to information. An OnDemand system can support small office environments as well as large enterprise installations with hundreds of system users. OnDemand can dramatically improve productivity and customer service in many businesses by providing fast access to information contained in archived documents.

OnDemand processes the output of application programs, extracts index fields, stores index information in a relational database, such as DB2, and archives documents in ADSM. OnDemand's storage management system supports archiving newly created and frequently accessed documents on high speed, magnetic storage volumes and can automatically migrate documents to other types of storage volumes as files age.

OnDemand fully integrates the capabilities of Advanced Function Presentation (AFP), including management of resources, indexes, and annotations, and supports full fidelity reprinting and faxing of documents on devices attached to a PC, OnDemand server, or other server on the network.

OnDemand provides administrators with management programs, including the OnDemand administrative client, to manage OnDemand servers, maintain OnDemand applications, archive documents, authorize end-users to access OnDemand servers, and back up critical files and databases.

OnDemand provides users the ability to view documents, print or fax copies or pages of documents, and attach electronic notes to archived documents.

Some of the advantages OnDemand offers over data archiving and retrieval methods you may have used include the ability to:

- Retrieve the section of the document that you need without processing the entire document.

- Easily locate data without knowing the individual document or cycle date.
- Print or fax a replica of the original document.

OnDemand provides you with an information management tool that can increase your effectiveness when working with customers.

OnDemand does the following:

- Integrates data created by application programs into an online, electronic information archive and retrieval system.
- Provides access to millions of reports instantly.
- Retrieves the data you need when you need it.
- Provides capabilities to view, annotate, print, and fax documents.

These features mean that OnDemand can help you quickly retrieve the specific page of a document that you need to provide fast customer service.

OnDemand documents

OnDemand documents represent indexed groups of pages. Typically an OnDemand document is a logical section of a larger report, such as an individual customer statement within a report of thousands of statements. An OnDemand document can also represent a portion of a larger report. For reports that do not have logical groups of pages, such as transaction logs, OnDemand can divide the report into 100 page groups. The 100 page groups are individually indexed and can be retrieved to the client workstation much more efficiently than the entire report.

OnDemand folders

Your OnDemand administrator stores information in related collections called folders. Think of a folder as a container for related information, such as statements, invoices, or correspondence, just like a manila folder is used in a metal filing cabinet. When you open a folder, you have access to the information contained in that folder. For example, a billing folder could contain the reports for customer transactions over the past two years. Folders are identified by name, for example, Customer Statements.

The OnDemand system

An OnDemand system consists of client programs and server programs that communicate over a network and storage and database management programs that provide support for various types of storage devices.

Figure 1 shows an example of a typical OnDemand system. In the example, OnDemand client programs communicate with the OnDemand servers over a network running the TCP/IP communications protocol. Another OnDemand client program communicates with OnDemand over telephone lines using modems, also supported by TCP/IP. The OnDemand library server manages a database of information about the users of the system and the documents archived in OnDemand. An OnDemand object server, residing on a different server connected to the network, manages the documents that reside on magnetic and optical storage devices.

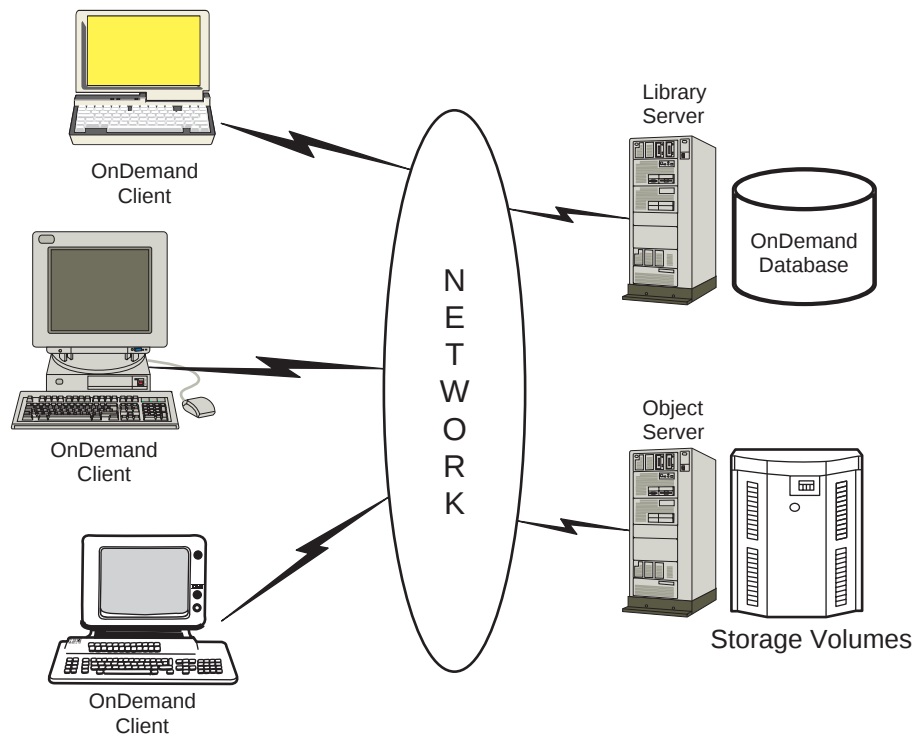


Figure 1. The OnDemand System.

OnDemand client programs operate on personal computers running OS/2, Windows 3.1, Windows 95, Windows 98, and Windows NT. The client program is your way to access documents archived in OnDemand. Using the client program, you can construct queries and search for documents, retrieve items from OnDemand, view, print, and fax copies or pages of documents, and attach electronic notes to document pages.

OnDemand servers manage control information and index data; store and retrieve report files, resource group files, and documents; and process query

requests from OnDemand client programs. Documents can reside on magnetic and optical storage volumes. New documents can be archived in OnDemand every day. That way, OnDemand always retrieves the latest information generated by application programs.

OnDemand client programs and servers communicate over a computer network supported by TCP/IP. When you search for documents, OnDemand sends a search request to the OnDemand library server. The library server returns the list of documents that meet your search request. When you select a document for viewing, the client program retrieves a copy of the document from the object server where the document resides, opens a viewing window, and displays the document.

Chapter 6. Related IBM EDMSuite Products

OnDemand is one of the web-enabled products included in the IBM Enterprise Document Management Suite (EDMSuite), which is a portfolio of IBM software that includes imaging, computer output to laser disk (COLD) document management, and workflow. In addition to OnDemand, EDMSuite contains four more products:

- ImagePlus VisualInfo
- ContentConnect
- MQSeries Workflow
- Domino Doc

For more information on EDMSuite, visit the EDMSuite homepage at <http://www.software.ibm.com/data/edmsuite>.

ImagePlus VisualInfo

ImagePlus VisualInfo is a distributed and scalable client/server solution that enables the management and storage of a broad array of document types, such as document images, graphics, spreadsheets, text, audio, and video. ImagePlus consists of scalable, multiplatform offerings for organizations of all sizes. ImagePlus implementations range from simple store-and-retrieve applications to image and workflow-enabling, very high-volume, transaction-oriented business processes. Some ImagePlus capabilities allow you to:

- Develop a robust library to store documents
- Handle multiple file types in addition to images, such as word processing documents, audio and video clips, and spreadsheets
- Manage and migrate documents across magnetic, optical, and tape storage automatically

ContentConnect

ContentConnect is a client toolkit based on Java that provides single-query access to multiple repositories from Web browsers, Lotus Notes clients, and stand-alone clients. ContentConnect provides a search engine that supplies reliable and immediate access to advanced document imaging, workflow, COLD archiving, and collaborative document management components. ContentConnect presents its search results in an organized, seamless, easy-to-read manner. ContentConnect not only connects document archives

and processes to other components of EDMSuite, but also connects its users to the document management world outside EDMSuite.

MQSeries Workflow (formerly FlowMark)

MQSeries Workflow is a workflow engine designed for the client/server environment. MQSeries Workflow is dedicated to managing the flow of work, allowing companies to integrate the applications required to meet the needs of their business processes. MQSeries Workflow allows you to:

- Separate application logic from business process rules
- Tie legacy and client/server applications to business process steps
- Monitor processes to show where a specific piece of work is in the overall process
- Record live production process data for analysis by management
- Model, animate, and simulate your business processes rapidly
- Enable processes across the Internet and Intranets

Domino Doc

Domino.doc is a Web-based document and content management solution that allows organizations to capture, file, retrieve, and distribute content across the Internet using desktop applications, Web browsers, or any Lotus Notes client. Domino.doc allows you to:

- Create document profiles that enforce the capture of key document search terms, so documents can be searched and retrieved easily
- Create a common library to provide a knowledge base of documents for your enterprise
- Use version control to provide a history of previous changes
- Use check-in and check-out controls to ensure data integrity

Part 3. Getting started

This part of the book covers OnDemand essentials:

“Chapter 8. Starting the OnDemand client” on page 33

“Chapter 9. Logging on to a server” on page 37

“Chapter 10. Opening folders” on page 39

“Chapter 11. Searching for documents” on page 41

“Chapter 12. Working with documents” on page 45

“Chapter 13. Ending your OnDemand session” on page 53

Chapter 7. Getting Help

OnDemand online Help offers several ways to get answers to your OnDemand questions.

Note: To learn about Help and for information about how to use Help, select Using Help from the Help menu.

Getting task Help

Online Help for all OnDemand tasks is organized by task. The procedures give you quick, step-by-step directions to help you complete your tasks. To get task Help, select How Do I from the Help menu.

Getting Help for windows

Online Help is available for all OnDemand windows and dialog boxes. Window Help gives you detailed information about the purpose of the window and the fields, options, and commands contained in the window. To get window Help, click the Help button when the window is active.

Getting Help for menu commands

Online Help is available for all of the commands on the OnDemand menus. Command Help gives you a brief description of the command. To get command Help, first select the command and then press the F1 key.

Using the Help index

When you click the Index tab on OnDemand's online Help, a list of keywords appears. Enter a word or subject and, if it's on the list, the index scrolls to that keyword. When you double-click the keyword, Help displays either a Help topic or a list of topics to choose from.

Chapter 8. Starting the OnDemand client

Note: Your system may be configured to start the OnDemand client automatically. For example, some customers configure systems so that after a user starts the system, OnDemand displays the Logon to a Server dialog box. If you do not have to start OnDemand, skip this section and go to “Chapter 9. Logging on to a server” on page 37.

You can start the OnDemand client different ways. We’ve listed some of the most common:

- “Starting from the desktop”
- “Starting the OS/2 client”
- “Starting the Windows 3.1 client” on page 34
- “Starting from the Start menu” on page 34 (Windows 95, Windows 98, Windows NT only)
- “Starting from the Run dialog box” on page 34 (Windows 95, Windows 98, Windows NT only)

Starting from the desktop

To start the OnDemand client from the desktop, follow these steps:

1. Locate the OnDemand icon on the desktop.
2. Double-click the OnDemand icon. The Logon to a Server dialog box appears in the foreground of the OnDemand work space.

OnDemand needs to know certain information to begin communicating with a server. OnDemand collects this information in the Logon to a Server dialog box. For more information about logging on, see “Chapter 9. Logging on to a server” on page 37.

Starting the OS/2 client

To start the OnDemand OS/2 client, follow these steps:

1. Open OnDemand program group.
2. Double-click the OnDemand icon. The Logon to a Server dialog box appears in the foreground of the OnDemand work space.

OnDemand needs to know certain information to begin communicating with a server. OnDemand collects this information in the Logon to a Server dialog box. For more information about logging on, see “Chapter 9. Logging on to a server” on page 37.

Starting the Windows 3.1 client

To start the OnDemand Windows 3.1 client, follow these steps:

1. In Program Manager, open OnDemand program folder.
2. Double-click the OnDemand icon. The Logon to a Server dialog box appears in the foreground of the OnDemand work space.

OnDemand needs to know certain information to begin communicating with a server. OnDemand collects this information in the Logon to a Server dialog box. For more information about logging on, see “Chapter 9. Logging on to a server” on page 37.

Starting from the Start menu

To start OnDemand from the Start menu, follow these steps:

1. Click Start on the Taskbar. Windows opens the Start menu.
2. Move the pointer to Programs.
3. Move the pointer to OnDemand 32.
4. Click OnDemand32 English. The Logon to a Server dialog box appears in the foreground of the OnDemand work space.

OnDemand needs to know certain information to begin communicating with a server. OnDemand collects this information in the Logon to a Server dialog box. For more information about logging on, see “Chapter 9. Logging on to a server” on page 37.

Starting from the Run dialog box

To start the OnDemand from the Run dialog box, follow these steps:

1. Click Start on the Taskbar. Windows opens the Start menu.
2. Click Run. Windows opens the Run dialog box.
3. Type the full path name of the OnDemand client program (the drive and folder, followed by arsgui32.exe, and optionally the language and other startup parameters).

If you do not know the path, click Browse to select it.

4. Click OK. Windows closes the Run dialog box and starts OnDemand. The Logon to a Server dialog box appears in the foreground of the OnDemand work space.

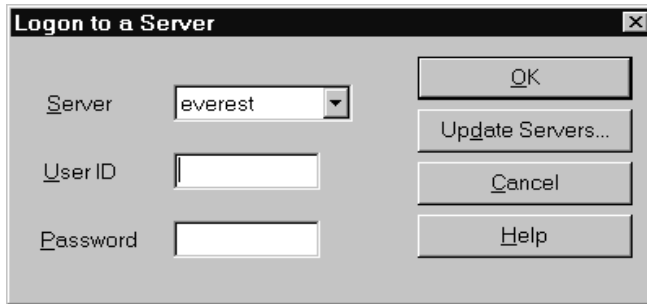
OnDemand needs to know certain information to begin communicating with a server. OnDemand collects this information in the Logon to a Server dialog box. For more information about logging on, see “Chapter 9. Logging on to a server” on page 37.

Chapter 9. Logging on to a server

Note: Your system may be configured to automatically log on to a specific OnDemand server. For example, some customers configure systems so that after a user starts the client, OnDemand displays the Open a Folder dialog box. If you do not have to log on to a server, skip this section and go to “Chapter 10. Opening folders” on page 39.

To logon to an OnDemand server, follow these steps:

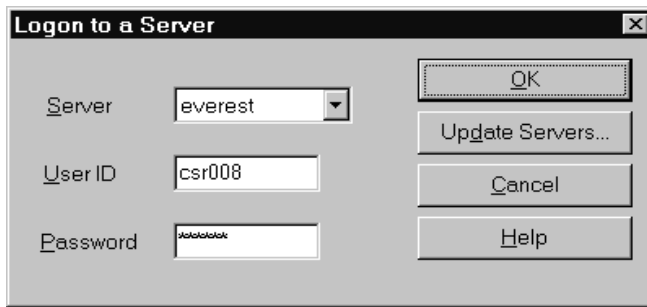
1. If the Logon to a Server dialog box is not active in the OnDemand workspace, select Logon from the File menu. OnDemand displays the Logon to a Server dialog box.



2. If your OnDemand administrator has configured the client with the name of your OnDemand server, the name appears in the Server field. (If your administrator has configured the client with the names of several servers, the names appear in the list. Click the arrow and select a name from the list.)

If there are no servers listed or if you cannot find the name of the server you need, click Update Servers. OnDemand displays the Update Servers dialog box. See “Appendix B. Updating server information” on page 59 for more information about adding servers.

3. Type your OnDemand User ID and Password into the spaces provided. For example:



4. Click OK to log on to the server. OnDemand verifies your OnDemand User ID and Password on the Server. When your OnDemand User ID and Password are verified, the Open a Folder dialog box appears. See “Chapter 10. Opening folders” on page 39 for information on opening folders.

Chapter 10. Opening folders

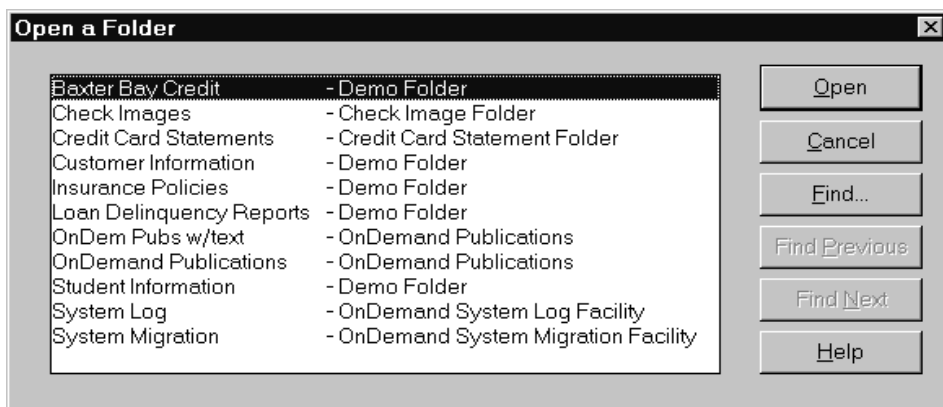
Note: OnDemand displays the Open a Folder dialog box only if there is more than one folder from which to choose. Otherwise, OnDemand displays the Search Criteria and Document List dialog box immediately after logging on the server. If you do not have to choose folders, skip the following steps and go to “Chapter 11. Searching for documents” on page 41.

To open a folder, follow these steps:

1. If the Open a Folder dialog box is not open in the OnDemand work space, open it now:

Menus	Toolbar	Keyboard
Select Open Folder from the File menu	Click 	Press and hold the Ctrl key and then press the O key

The folders you can access appear in the Open a Folder dialog box. For example:



2. To open a folder, double-click the folder name or use the arrow keys on your keyboard to move to the folder name and then press the Enter key. OnDemand displays the Search Criteria and Document List dialog box. See Figure 2 on page 41 for an example of the Search Criteria and Document List dialog box.

Note: You can open more than one folder at a time. When you are working with more than one folder, OnDemand lists the open folders in the Window menu.

Chapter 11. Searching for documents

Overview

Search for documents from the Search Criteria and Document List dialog box. Figure 2 shows an example. The Title Bar shows the name of the folder you opened. In the example, the name of the folder is Baxter Bay Credit.

Note: If the Search Criteria and Document List dialog box does not appear in the OnDemand work space, see “Chapter 10. Opening folders” on page 39.

Baxter Bay Credit - Search Criteria and Document List

Search Criteria

Account Like

Name Like

Balance Equal To

Date Between and

Search

Clear All Fields

Restore Defaults

Close Folder

Logical

☒ AND ☐ OR

Document List

Date	Account	Name	Balance
------	---------	------	---------

View All Selected

Print All Selected

Sort List...

☐ Append

Figure 2. Search Criteria and Document List Dialog Box.

The Search Criteria area contains fields, controls, and commands you can use to search for documents:

- Field names. The number and names of the fields vary by folder. In the example, there are four search fields: Account, Name, Balance, and Date.
- Operators (one active for each field). In the example, the operator for the Date field is Between. OnDemand uses standard SQL search operators to

search for documents. Click a search operator button to display all of the search operators available for the field.

Note: The search operators available for a field are set by an OnDemand administrator and can vary by folder and field.

- Entry fields. Places for you to type search values (such as text, numbers, and dates). When a search entry field has a ↓, click the ↓ to select from pre-set choices.
- Commands:

Search Use to initiate a search.

Clear All Fields Use to erase the values from all of the search fields.

Restore Defaults Use to replace the contents of the search fields with and set the search operators to the values that appeared when you first opened the folder.

- Logical operator. AND means the search must match all of the search criteria. OR means the search must match at least one of the search criteria. Unless you have a good reason for doing so, do not change the Logical operator.

The Document List area lists the documents that match the search criteria and contains controls for working with documents. See “Chapter 12. Working with documents” on page 45 for more information.

Searching for documents

To search for documents, follow these steps:

1. Type search values (for example, an account, name, balance, or date) into one or more search entry fields:
 - Press the Tab keyboard key to move from one entry field to another. You do not have to type a value in every entry field. However, you may need to type a value in at least one entry field. Check with your OnDemand administrator about required values in the folders that you access.
 - You can use wildcards with the Like and Not Like search operators to represent other letters, numbers, or special characters. OnDemand uses two wildcards. The _ (underscore) character matches any single letter, number, or other special character. For example, if you type 1_0 in a search field, OnDemand will find 100, 110, 120...190. The % (percentage) character matches zero or more letters, numbers, or other special

characters. For example, if you type MARS% in a search field, OnDemand will find MARS, MARSCH, MARSHALL, MARSHALLS, and so forth.

2. Select search operators for each search field. Choose the search operator button to display the full range of operators available for each field. Select a search operator for a field by choosing one of the buttons in the Select Operator dialog box.
3. Click Search. OnDemand fills the Document List with the documents that match the search criteria and updates the status bar with a count of the number of documents. OnDemand lists the documents in the order they occur on the server or the order chosen by the OnDemand administrator.
4. OnDemand displays the following message on the status bar when it is searching the database:

Search is proceeding ... *nnn* documents have been selected.

where *nnn* is the number of documents that have satisfied the search criteria.

If you need to stop a search:

Toolbar

Click



Keyboard

Press the Space Bar

Most search requests will process quickly. It is possible for complex search requests to take several minutes. The more specific the search criteria you use, the less time OnDemand requires to complete a search. For example, searching using the Equal operator (that is, Equal MARSHAL) takes less time than searching using the Like operator (that is, Like MARSHAL).

If you configured Autoview (on the Options menu) for First Document, OnDemand automatically displays the first document from the list of documents that match the search criteria. If you configured Autoview for Single Document and only one document matches the search criteria, OnDemand automatically displays the document for you.

Chapter 12. Working with documents

Overview

Select the documents you want to work with from the Search Criteria and Document List dialog box. Figure 3 shows an example.

Note: If the Search Criteria and Document List dialog box does not appear in the OnDemand work space, see “Chapter 11. Searching for documents” on page 41.

Baxter Bay Credit - Search Criteria and Document List

Search Criteria

Account: Like []

Name: Like []

Balance: Equal To []

Date: Between 05/03/94 and 02/17/99

Search

Clear All Fields

Restore Defaults

Close Folder

Logical: ☒ AND ☐ OR

Document List

Date	Account	Name	Balance
04/03/95	000-000-007	ANN ARBOR CYCLERY	341.62
03/03/95	000-000-007	ANN ARBOR CYCLERY	341.62
02/03/95	000-000-007	ANN ARBOR CYCLERY	1252.52
01/03/95	000-000-007	ANN ARBOR CYCLERY	1252.52
12/03/94	000-000-007	ANN ARBOR CYCLERY	1886.38
11/03/94	000-000-007	ANN ARBOR CYCLERY	1278.22
10/03/94	000-000-007	ANN ARBOR CYCLERY	1278.22
09/03/94	000-000-007	ANN ARBOR CYCLERY	723.76

View All Selected

Print All Selected

Sort List...

☐ Append

Figure 3. Search Criteria and Document List Dialog Box.

The documents that meet the search criteria are listed in the Document List area. Use the scroll bars or arrow keys on your keyboard to move through the Document List.

Use the Document List commands to work with documents:

View All Selected

Use to view the documents you selected. If

you select more than one document, OnDemand reads each document into separate viewing window.

Print All Selected

Use to print the documents you selected.

Sort List

Use to resequence the documents in the Document List.

Append

Use to add lists of documents after those already in the Document List. By default, every time you click Search, OnDemand replaces the documents listed with the documents that match the search.

AutoScroll

Use to automatically scroll the Document List as search results are found.

Note: The AutoScroll check box is not included on the Search Criteria and Document List dialog box when the documents in the Document List are generated in sorted order.

The number of documents that you can view at the same time is determined by system resources and the types of documents you want to view. Typically fewer AFP documents can be displayed at one time, while a larger number of line data documents can be displayed at one time. Experiment to determine how many documents you can display at one time. OnDemand reads each document you select into a separate viewing window.

OnDemand uses the Autoview command to determine whether to automatically display a document after completing a search. You can configure the Autoview command from the Options menu:

None

OnDemand does not automatically display a document found by a search. None is the default setting.

First Document

OnDemand automatically displays the first document from the list of documents that match the search criteria.

Single Document

When only one document matches the search criteria, OnDemand automatically displays it for you.

Selecting documents for viewing

To select documents for viewing, follow these steps:

1. Select documents from the Document List area of the Search Criteria and Document List dialog box. Use one of the following methods:
 - Choose a single document you want to view.
 - Place the pointer on the first document you would like to view. Click the mouse button. Move the pointer to the next document you would like to view. Hold down the Ctrl key and click the mouse button. Release the Ctrl key. Repeat to select additional documents.
 - Place the pointer on the first document you would like to view. Click and hold down the mouse button. Drag the pointer to select a group of documents. Release the mouse button.
 - Place the pointer on the first document you would like to view. Click the mouse button. Move the pointer to the last document you would like to include in the group. Press and hold down the Shift key. Click the mouse button. Release the Shift key.
2. Click View All Selected. OnDemand displays the selected documents, each in a separate window.

When you select multiple documents for viewing, OnDemand displays the following message on the status bar:

Document retrieval is proceeding for *document name*.

If you need to stop the retrieval of the current document and any remaining documents:

Toolbar	Keyboard
Click 	Press the Space Bar

Figure 4 on page 48 shows an example of a document in the viewing window after you have clicked View All Selected on the Search Criteria and Document List dialog box.

To open documents from the Document list while you are viewing a document, use one of the following methods:

Note: These methods close the document you are viewing before opening another document.

Menus	Toolbar	Keyboard
• Select Previous Item in Document List from the Window menu • Select Next Item in Document List from the Window menu	• Click  • Click 	• Press and hold the Alt key and press F9 • Press and hold the Alt key and press F10

To return to the Search Criteria and Document List dialog box when you are viewing a document, use one of the following methods:

Menus	Toolbar	Keyboard
Select the folder name from the Window menu	Click 	Press and hold the Ctrl key and press the D key

Viewing documents

This section shows you how to do some of the basic document tasks, such as:

- Moving to pages in a document
- Finding information in a document
- Annotating a document

Moving to pages in a document

When the document you are viewing contains more than one page, you can move to different pages in the document (“navigate the document”) in different ways. We’ve listed some of the most common:

Menus	Toolbar	Keyboard
• Select Go To from the Search menu to move to a specific page in the document you are viewing • Select First Page from the Search menu to move to the first page of the document • Select Last Page from the Search menu to move to the last page • Select Previous Page from the Search menu to move to the previous page • Select Next Page from the Search menu to move to the next page	• Click  • Click  • Click 	• Press F4 to move to a specific page in the document you are viewing • Press and hold the Ctrl key and press the Home key to move to the first page in the document • Press F7 to move to the previous page • Press F8 to move to the next page

When you choose the Go To command, OnDemand displays the Go To dialog box for you to pick the page to move to.

Finding information in a document

Use the Find dialog box to locate information in the document you are viewing. For example, if the document you are viewing contains hundreds (or thousands) of customer names, you can use the Find command to locate a specific customer name. You can then use the Find Next and Find Previous commands to move to other occurrences of the customer name in the document.

To begin finding information in a document:

1. Open the Find dialog box using one of the following methods:

Menus	Toolbar	Keyboard
Select Find from the Search menu	Click 	Press F5

2. Enter the information you want to find in the String field. Click Help to get online Help about the information you can enter and other options on the Find dialog box.

3. When you are ready, click Find. OnDemand moves to the first occurrence of the string in the document.
4. You can move to other occurrences of the Find String in the document by using one of the following methods:

Menus	Toolbar	Keyboard
• Select Find Previous from the Search menu • Select Find Next from the Search menu	• Click  • Click 	• Press and hold the Ctrl key and press the R key • Press and hold the Ctrl key and press the N key

Annotating a document

Annotations, also known as notes, contain information you and other users can attach to documents. The information can be clarifications and reminders about a document, discussions about a document, or any other information you want to attach to a document.

Note: An OnDemand administrator must give you permission to add, update, and delete annotations.

When you want to add a note to a document or view existing notes, use one of the following methods:

Menus	Toolbar	Keyboard
• Select Add Notes from the Notes menu to add a note to the document you are viewing • Select View Notes from the Notes menu to view existing notes	Click 	• Press and hold the Ctrl key and then press the A key to add a note to the document you are viewing • Press and hold the Ctrl key and then press the N key to view existing notes

After you choose the Add Notes command, OnDemand opens the Add a Note dialog box. Click Help on the Add a Note dialog box to learn more about your options when adding notes to documents.

After you choose the View Notes command, OnDemand opens the Notes dialog box. From the Notes dialog box, you can read existing notes, add your

own notes, and delete notes. You can also search notes. Click Help on the Notes dialog box to learn more about working with notes.

Chapter 13. Ending your OnDemand session

This section describes different ways you can close documents and folders and log off the OnDemand server.

Closing documents

You can close documents in different ways. We've listed some of the most common:

Menus	Toolbar	Keyboard
• Select Close Document from the File menu to close the document you are viewing • Select Close All Documents from the File menu to close all open documents • Select Close Folder from the File menu to close a folder and all open documents from the folder. • Select Exit OnDemand from the File menu to close all open documents and folders, and exit OnDemand	• Click  to close the document you are viewing and open the previous document in the Document List. • Click  to close the document you are viewing and open the next document in the Document List.	• Press F3 to close the document you are viewing • Press and hold the Alt key and press F3 to close all open documents • Press and hold the Alt key and press F4 to close all open documents and folders, and exit OnDemand

Closing folders

Use one of the following methods to close a folder without logging off the server or exiting OnDemand:

- Click Close Folder on the Search Criteria and Document List dialog box
- Select Close Folder from the File menu.
- Select Close All Folders from the File menu.

Note: If you have more than one folder open and you select Close Folder from the File menu, OnDemand closes the current folder. (OnDemand places a check next to the current folder in the Window menu.)

Logging off a server

To log off a server, select Logoff from the File menu.

Stopping OnDemand

You can stop the OnDemand client in different ways. We've listed some of the most common:

Menus	Keyboard
Select Exit OnDemand from the File menu	Press and hold the Alt key and then press F4

Part 4. Appendixes

Appendix A. Startup parameters

OnDemand provides parameters that you can specify as properties for starting the client program. You can use the parameters to automate the logon process, and configure other startup properties of the client. Table 1 lists the startup parameters for the client program.

Table 1. Client Program Start Up Parameters

Parameter	Purpose	Example
<i>/F folder</i>	Identifies the folder to open. Use with the <i>/P</i> , <i>/S</i> , and <i>/U</i> parameters automatically log on to a server and display the Search Criteria and Document List dialog box for the specified folder. If the specified folder is not found on the server, OnDemand displays the Open Folder dialog box.	<i>/F Student Information</i>
<i>/P password</i>	The password for the userid identified by the <i>/U</i> parameter. Use with the <i>/S</i> and <i>/U</i> parameters to log on to a server without displaying the Logon to a Server dialog box. If the logon is not successful, OnDemand allows the user to log on to the server by displaying the Logon to a Server dialog box.	<i>/P xxxxxxxx</i>
<i>/S server</i>	Identifies the OnDemand server. Use with the <i>/P</i> and <i>/U</i> parameters to log on to a server without displaying the Logon to a Server dialog box. If the logon is not successful, OnDemand allows the user to log on to the server by displaying the Logon to a Server dialog box.	<i>/S peluchage</i>

Table 1. Client Program Start Up Parameters (continued)

Parameter	Purpose	Example
/U <i>userid</i>	Identifies the OnDemand userid. Use with the /P and /S parameters to log on to a server without displaying the Logon to a Server dialog box. If the logon is not successful, OnDemand allows the user to log on to the server by displaying the Logon to a Server dialog box.	/U csr0008

Changing startup parameters

To change the startup parameters for the client program:

1. Locate the shortcut for the OnDemand client program on the desktop, in the Start menu, or in the OnDemand program folder or group.
2. Open the program Properties dialog box.
3. In the Target field, type the startup parameters you wish to use.

Important: Type the startup parameters after the absolute path name of the client program and language Dynamic Link Library (DLL).
See your OnDemand administrator if you have questions.

The following is an example:

```
C:\ARS32\ARSGUI32.EXE /1 C:\ARS32\LOCALE\ENU /S peluchage /U csr0008 /P XXXXXXXX /F Student Information
```

4. Click OK to save your changes.

Appendix B. Updating server information

This section describes how to add, update, and delete the servers you can access from the client. Before you proceed, see your OnDemand administrator for information about servers you can access with your client, including:

- Types of servers
- Communications protocols
- Other details you need to work with OnDemand servers

Use the Update Servers command from the Logon to a Server dialog box:

- To add a server to the list of servers you can access
- To change information for a server that you can access
- To delete a server from the list of servers that you can access

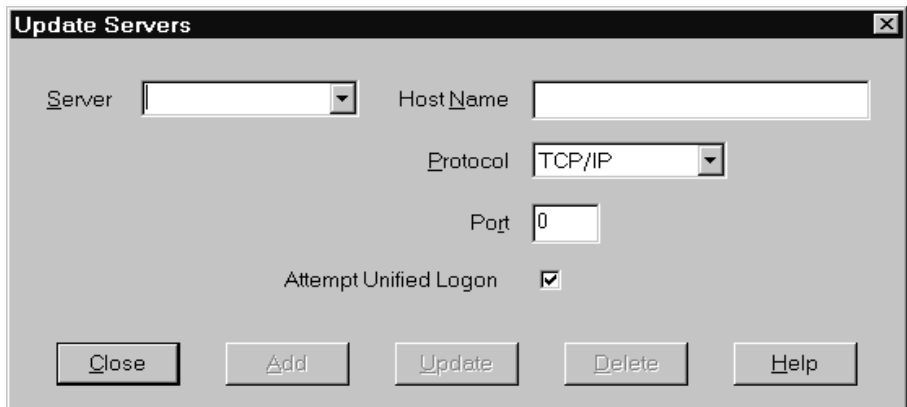
You can change information for TCP/IP servers and Local servers.

The first time that you start OnDemand, the Server field on the Logon to a Server dialog box may not contain any entries. Check with your OnDemand administrator for a list of servers that you need to enter for your use.

Updating information for TCP/IP servers

Adding a TCP/IP server

1. Click Update Servers from the Logon to a Server dialog box. OnDemand displays the Update Servers dialog box. For example:



The screenshot shows a dialog box titled "Update Servers" with a standard Windows-style title bar (minimize, maximize, close buttons). Inside the dialog, there are four main input areas: "Server" with a dropdown arrow, "Host Name" with a text box, "Protocol" with a dropdown menu currently showing "TCP/IP", and "Port" with a text box showing "0". Below these is a checkbox labeled "Attempt Unified Logon" which is checked. At the bottom of the dialog, there are five buttons: "Close", "Add", "Update", "Delete", and "Help".

2. To add the name of a server to the list of available servers, type the name of the OnDemand library server in the Server field. The server name can be a TCP/IP host name alias, fully-qualified host name, or IP address.
3. Optionally, enter the TCP/IP host name alias, fully-qualified host name, or IP address of the OnDemand library server in the Host Name field. By default, the Host Name field contains the same value as the Server field. Unless you have a good reason to change the Host Name, we recommend that you use the default provided.
4. From the Protocol list, select TCP/IP, if it is not already selected.
5. Verify the Port. This is the TCP/IP port number that the server program monitors for client program requests.
The default value, 0 (zero), means that OnDemand uses the port number of the OnDemand service. Unless you have a good reason to change the Port, we recommend that you use the default provided. See your administrator for more information.
6. If the server you are adding runs under Windows NT, select Attempt Unified Logon. Otherwise, clear the Attempt Unified Logon check box.
7. When complete, click Add.
If you do not want to add the server, click Close instead, to return to the Logon to a Server dialog box.
8. Click Close to close the Update Servers dialog box and return to the Logon to a Server dialog box.

Changing a TCP/IP server

1. Click Update Servers from the Logon to a Server dialog box. OnDemand displays the Update Servers dialog box. For example:

2. Select the server name from the Server list.
3. Make your changes.

4. When complete, click Update.
Click Close instead of Update to return to the Logon to a Server dialog box without making any changes.
5. When you have finished making changes for the server you are working with, click Close to return to the Logon to a Server dialog box.

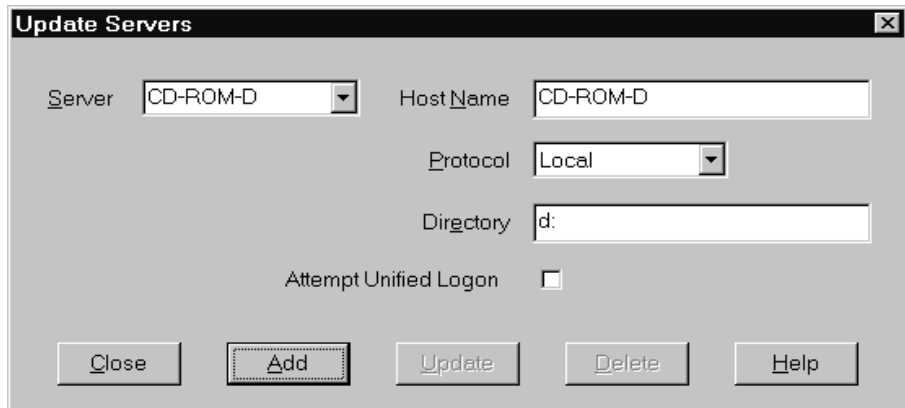
Updating information for local servers

There are three kinds of local servers:

- CD-ROM
- Network
- Hard Drive

Adding a CD-ROM server

1. Click Update Servers from the Logon to a Server dialog box. The Update Servers dialog box appears. For example:



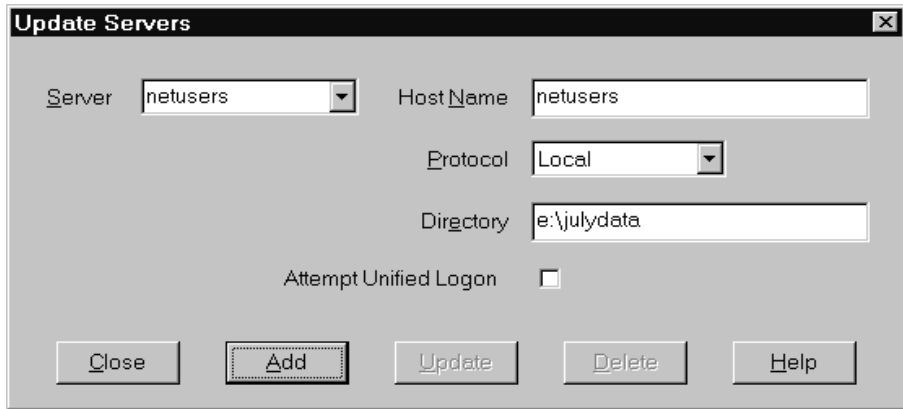
The screenshot shows the 'Update Servers' dialog box. It has a title bar with 'Update Servers' and a close button. Inside, there are four input fields: 'Server' (a dropdown menu with 'CD-ROM-D' selected), 'Host Name' (a text box with 'CD-ROM-D'), 'Protocol' (a dropdown menu with 'Local' selected), and 'Directory' (a text box with 'd:'). Below these fields is an unchecked checkbox labeled 'Attempt Unified Logon'. At the bottom of the dialog are five buttons: 'Close', 'Add', 'Update', 'Delete', and 'Help'.

2. Type the name of the server in the Server field. For example, suppose the drive letter of your CD-ROM is D:, you could name the server *CD-ROM-D*. When you have more than one CD-ROM drive, OnDemand uses the name to select the CD-ROM drive that contains the server.
3. Select Local from the Protocol list.
4. In the Directory field, enter the drive letter that is associated with the CD-ROM (for example, d:).
5. Clear the Attempt Unified Logon check box.
6. When complete, click Add to add the server to the Server list.
If you do not want to add the server, click Close instead, to return to the Logon to a Server dialog box.

7. Click Close to close the Update Servers dialog box and return to the Logon to a Server dialog box.

Adding a network or hard drive server

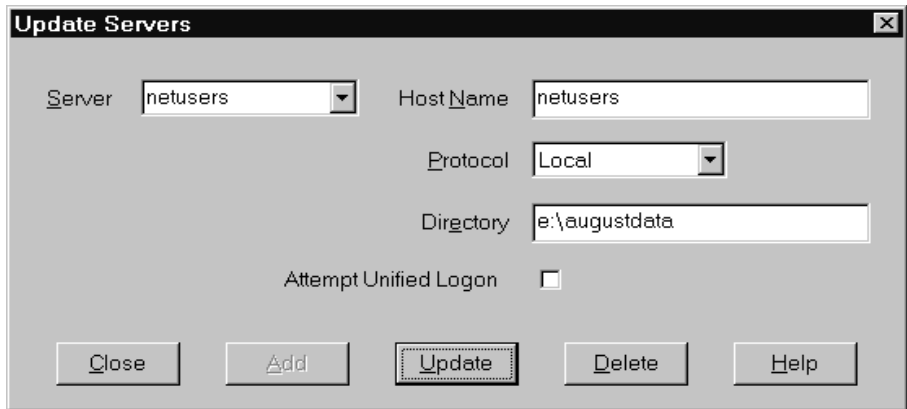
1. Click Update Servers from the Logon to a Server dialog box. The Update Servers dialog box appears. For example:



2. Type the name of the server in the Server field. For example, netusers or hdusers.
3. Select Local from the Protocol list.
4. When you add a Network or Hard Drive server, you must enter the directory or directory path to the server files in the Directory field.
5. Clear the Attempt Unified Logon check box.
6. When complete, click Add to add the server to the Server list.
If you do not want to add the server, click Close instead, to return to the Logon to a Server dialog box.
7. Click Close to close the Update Servers dialog box and return to the Logon to a Server dialog box.

Changing a local server

1. Click Update Servers from the Logon to a Server dialog box. The Update Servers dialog box appears. For example:

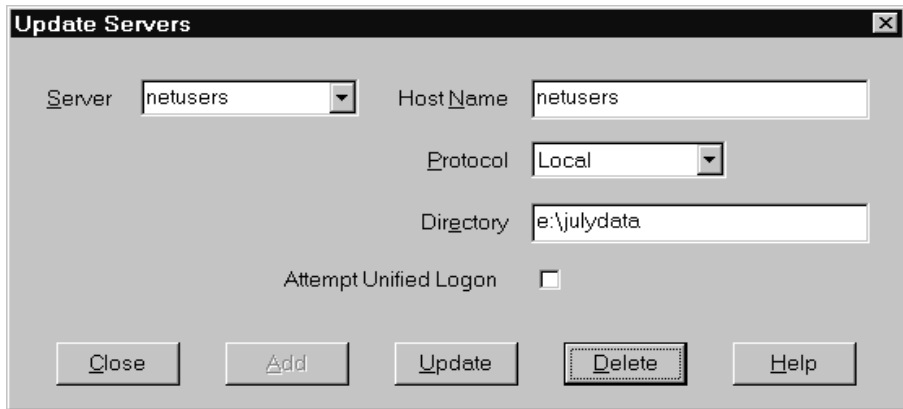


2. Select the server name from the Server list.
3. Make your changes.
4. When complete, click Update to change the information for the server you selected.
Click Close instead of Update, to undo any changes and return to the Logon to a Server dialog box.
5. When you have finished making changes for the server you are working with, click Close to the Logon to a Server dialog box.

Deleting a server

To delete a server from the list of servers that you can access, follow these steps:

1. Click Update Servers from the Logon to a Server dialog box. The Update Servers dialog box appears. For Example:



2. Select the server name that you want to delete from the Server list.
3. Click Delete. OnDemand removes the server from the list of servers that you can access.
If you do not want to delete the server, click Close instead, to return to the Logon to a Server dialog box.
4. Click Close to close the Update Servers dialog box and return to the Logon to a Server dialog box.

Glossary

ACIF. AFP Conversion and Indexing Facility.

administrator. In OnDemand, a person authorized to maintain the system. For example, an OnDemand administrator can add and maintain users and folders.

Advanced Function Presentation (AFP). A set of licensed programs that use the all-points addressable concept to print data on a wide variety of printers. AFP also includes creating, formatting, archiving, viewing, retrieving, and distributing information.

AFP Conversion and Indexing Facility (ACIF). An AFP program you can use to convert a print file into a MO:DCA-P document, to retrieve resources used by the document, and to index the file for later retrieval and viewing.

AFP. Advanced Function Presentation.

annotations. Comments, clarifications, and reminders that can be attached to a document.

application. Within OnDemand, an application is a definition for a specific type of document or report, including the format of the pages, the datastream, and logical view characteristics. There is usually a direct correlation between an OnDemand application and the host application that produces output for OnDemand.

client. A personal computer connected to a network that requests documents from an OnDemand server.

copy group. A portion of a form definition that defines a set of modifications that can be used when viewing a page. Modifications can include text suppression, form flash, overlays, etc.

default. A value, attribute, or option that is assumed when no alternative is specified by the user.

default value. A value stored in the system that is used when no other value is specified. See also default.

dialog box. An application window on the display that requests information from the user.

document. In OnDemand, a part of a report, such as a statement, policy, or other logical grouping of pages.

double-click. To rapidly press mouse button 1 twice while pointing to an object.

drag. To hold down mouse button 1 while moving the mouse.

enter. (1) An instruction to type specific information using the keyboard. (2) A keyboard key that, when pressed, confirms or initiates the selected command.

entry field. The place in a dialog box where you type text and numbers. Use entry fields in OnDemand to type search criteria.

folder. A folder is a container for related information, such as statements, invoices, or correspondence, just like a manila folder is used in a metal filing cabinet. When you open a folder, you have access to all the information contained in that folder. For example, a billing folder could contain all of the reports for all customer transactions over the past two years.

icon. A 32 by 32 pixel bitmap used in Windows to represent an application or other window.

IPX. Internetwork Packet Exchange, a network protocol.

LAN. Local area network.

line data. Data prepared for printing on a line printer, such as an IBM 3800 Model 1 Printing

Subsystem. Line data is usually characterized by carriage-control characters and table reference characters.

line-data print file. A file that consists of line data, optionally supplemented by a limited set of structured fields.

local area network (LAN). A computer network located on a user's premises within a limited geographical area. Communications within a local area network is not subject to external regulations; however, communication across the LAN boundary may be subject to some form of regulation.

menu bar. The area at the top of a window that contains choices that give a user access to actions available in that window.

mouse. A hand-held locator that a user operates by moving it on a flat surface. It allows the user to select objects and scroll the display screen by pressing buttons.

named query. A set of entry field values on the Search Criteria and Document List dialog box that a user has named and saved for selection as search criteria at a future time.

network. A collection of data processing products that are connected by communication lines for information exchange between locations.

notes. Comments, clarifications, and reminders that can be attached to a document.

PC. Personal Computer.

point. To move the mouse pointer to a specific object.

press. To touch a specific key on the keyboard.

Print Services Facility (PSF). An IBM program product that manages printers and supports printing AFP files and line data.

radio button. Round option buttons grouped in dialog boxes; one is pre-selected. Like a radio in an automobile, select only one button ("station") at a time.

report. In OnDemand, any type of data stored in the system. A 10,000 page general ledger generated by an OS/390 system and a one page Lotus WordPro file are both reports to OnDemand.

select. To pick a menu command or other object with a single click of the mouse.

server. A workstation connected to a network that runs OnDemand programs. An OnDemand server retrieves documents for client personal computers.

server printer. A printer attached to an OnDemand for AIX server.

SPX. Sequenced Packet Exchange, a network protocol.

string. A series or set of alphabetic or numeric characters. A string can be composed of letters, numbers, and special characters.

toolbar. The region directly beneath the menu bar of the main window.

toolbar button. A small bitmap on the toolbar that represents OnDemand commands. Click a toolbar button to quickly access a command.

type. To enter specific information using the keyboard, typing characters exactly as given.

user. In OnDemand, a person authorized to access folder on the server.

viewing window. The window in OnDemand where you look at or browse documents.

wildcard. Search characters that represent other letters, numbers, or special characters. In OnDemand, the % (percentage) and the _ (underscore) are wildcard characters that can only be used with the LIKE and NOT LIKE search operators.

Index

A

- Acrobat
 - installing 4
- Adobe software
 - installing 4
- AFP fonts
 - mapping
 - OS/2 client 9
 - Windows 3.1 client 14
 - Windows 95 client 18
 - Windows 98 client 18
 - Windows NT client 18
- annotations 51
- ATM
 - installing 4
- automated install 9, 13, 18
- automatically viewing a document 46
- autoview 46

C

- cancel a search 43
- cancel document retrieval 47
- CD-ROM as a server 61
- changing information for existing servers 60, 62
- client
 - command line parameters 57
 - startup parameters 57
- client/server environment
 - overview 24
- closing documents 53
- closing folders 53
- command line parameters 57
- commands
 - help 31
- concepts
 - client/server environment 24
 - system overview 24
- create and display notes toolbar button 51

D

- dialog boxes
 - help 31
 - Logon to a Server 37
 - Open a Folder 39
 - Search Criteria and Document List 41, 45
 - Update Servers 59

- display previous page when viewing toolbar button 50
- display the next open document toolbar button 48
- display the previous open document toolbar button 48
- distribution install 3
- document List toolbar button 49
- document viewing window 48

E

- Exchange
 - installing 4
- exit from OnDemand 54

F

- file server
 - installing client software on 9, 13, 18
- Find for next occurrence toolbar button 50, 51
- Find for previous occurrence toolbar button 51
- Find toolbar button 50
- finding information in documents 50
- folders
 - closing 53
 - opening 39
- fonts
 - mapping
 - OS/2 client 9
 - Windows 3.1 client 14
 - Windows 95 client 18
 - Windows 98 client 18
 - Windows NT client 18

G

- go to command 49
- Go To toolbar button 50

H

- hard drive as an OnDemand server 62
- help
 - commands 31
 - dialog boxes 31
 - index 31
 - tasks 31
 - windows 31

How do I?

- change server information 59
- close documents 53
- close folders 53
- exit from OnDemand 54
- log off a server 54
- logon to a Server 37
- open folders 39
- select and view documents 45
- start from OS/2 33
- start from the desktop 33
- start from the Run Dialog box 34
- start from the Start menu 34
- start from Windows 3.1 34
- stop OnDemand 54
- update server information 59

I

- installing
 - Acrobat 4
 - Adobe software 4
 - ATM 4
 - distribution 3
 - Exchange 4
 - multiple user 3
 - network 3
 - OS/2 client 7
 - Windows 3.1 client 11
 - Windows 95 client 15
 - Windows 98 client 15
 - Windows NT client 15

L

- logging off a server 54
- logging on a server 37
- Logon to a Server dialog box 37

M

- moving to pages in a document 49
- multiple user install 3

N

- navigating a document 49
- Network drive as an OnDemand server 62
- network file server
 - installing client software on 9, 13, 18
- network install 3
- notes 51

O

- OnDemand system overview 25
- Open a Folder dialog box 39
- opening folders steps 39
- OS/2 client
 - Acrobat 4
 - Adobe software 4
 - disk space requirements 7
 - hardware requirements 7
 - installing 7
 - network requirements 7
 - recommended system 7
 - software requirements 7
 - uninstalling 10

P

- parameters
 - command line 57
 - startup 57

R

- requirements
 - disk space 7, 11, 15
 - hardware 7, 11, 15
 - network 7, 11, 15
 - software 7, 11, 15
- retrieve and display the next document in the document list toolbar button 49
- retrieve and display the previous document in the document list toolbar button 49

S

- Search Criteria and Document List dialog box 41, 45
- searching for documents 41
- select and view documents 45
- starting OnDemand
 - from OS/2 33
 - from the desktop 33
 - from the Run dialog box 34
 - from the Start menu 34
 - from Windows 3.1 34
- startup parameters 57
- steps when logging on a Server 37
- steps when opening folders 39
- stop a search 43
- stop document retrieval 47
- stopping OnDemand 54

T

- task
 - help 31
- tasks
 - closing documents 53

tasks (continued)

- closing folders 53
- exiting from OnDemand 54
- logging off a server 54
- logging on to a Server 37
- opening folders 39
- selecting and viewing documents 45
- starting from OS/2 33
- starting from the desktop 33
- starting from the Run dialog box 34
- starting from the Start menu 34
- starting from Windows 3.1 34
- stopping OnDemand 54
- updating server information 59

TCP/IP servers, changing information 60

toolbar buttons

- create and display notes 51
- display previous page when viewing 50
- display the next open document 48
- display the previous open document 48
- Document List 49
- Find 50
- Find for next occurrence 50, 51
- Find for previous occurrence 51
- Go To 50
- retrieve and display the next document in the document list 49
- retrieve and display the previous document in the document list 49

U

- uninstall
 - OS/2 client 10
 - Windows 3.1 14
 - Windows 95 client 19
 - Windows 98 client 19
 - Windows NT client 19
- Update Servers dialog box 59
- updating server information 59
- user-defined files
 - installing 18
- using CD-ROM as a server 61
- using hard drive as an OnDemand server 62
- using Network drive as an OnDemand server 62

V

- viewing documents 48, 49
- viewing more than one document 48

W

- wildcards 42
- windows
 - help 31
- Windows 3.1 client
 - Acrobat 4
 - Adobe software 4
 - ATM 4
 - disk space requirements 11
 - Exchange 4
 - hardware requirements 11
 - installing 11
 - network requirements 11
 - recommended system 11
 - software requirements 11
 - uninstalling 14
- Windows 95 client
 - Acrobat 4
 - Adobe software 4
 - ATM 4
 - disk space requirements 15
 - Exchange 4
 - hardware requirements 15
 - installing 15
 - network requirements 15
 - recommended system 15
 - software requirements 15
 - uninstalling 19
- Windows 98 client
 - Acrobat 4
 - Adobe software 4
 - ATM 4
 - disk space requirements 15
 - Exchange 4
 - hardware requirements 15
 - installing 15
 - network requirements 15
 - recommended system 15
 - software requirements 15
 - uninstalling 19
- Windows NT client
 - Acrobat 4
 - Adobe software 4
 - ATM 4
 - disk space requirements 15
 - Exchange 4
 - hardware requirements 15
 - installing 15
 - network requirements 15
 - recommended system 15

Windows NT client (*continued*)
 software requirements 15
 uninstalling 19

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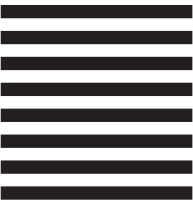
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