

EDMSuite OnDemand



Integration with Monarch Version 3

Version 2.2

Second Edition (February 2000)

This edition of *IBM EDMSuite OnDemand: Integration with Monarch Version 3* applies to IBM® EDMSuite OnDemand, Version 2 Release 2 and to all subsequent releases of this product until otherwise indicated in new releases or technical newsletters. **The following paragraph does not apply to the United Kingdom or any country where such provisions are inconsistent with local law:** INTERNATIONAL BUSINESS MACHINES CORPORATION PROVIDES THIS MANUAL "AS IS" WITHOUT WARRANTY OF ANY KIND, EITHER EXPRESSED OR IMPLIED, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE. Some states do not allow disclaimer of express or implied warranties in certain transactions. Therefore, this may not apply to you.

IBM does not warrant that the contents of this publication or the accompanying source code examples, whether individually or as one or more groups, will meet your requirements or that the publication or the source code is error-free.

Requests for copies of this publication and for technical information about IBM products should be made to your IBM authorized Dealer, your IBM Marketing Representative, or your IBM Software Solutions Representative.

IBM Software Solutions welcomes your comments. For your convenience, a form for reader's comments is provided at the back of this publication. You may send your comments by fax to 1-303-924-7522, by e-mail to Ondemand@us.ibm.com, or mail your comments to:

INFORMATION DEVELOPMENT
IBM SOFTWARE SOLUTIONS
DEPARTMENT MYGA BUILDING 001L
PO BOX 1900
BOULDER CO 80301-9191

Note: Visit our home page at <http://www.software.ibm.com/data/ondemand>

When you send information to IBM, you grant IBM a nonexclusive right to use or distribute the information in any way it believes appropriate without incurring any obligation to you.

However, the following copyright notice protects this documentation under the Copyright laws of the United States and other countries which prohibit such actions as, but not limited to, copying, distributing, modifying, and making derivative works.

© **Copyright International Business Machines Corporation 1999, 2000. All rights reserved.**
US Government Users Restricted Rights - Use, duplication or disclosure restricted by GSA ADP Schedule Contract with IBM Corp.

Contents

About this publication	v	Copying Monarch files	10
Who should use this publication	vi	Sharing the installation directory	10
How to use this publication	vi		
Product support	vii	Chapter 4. Running Setup.	11
OnDemand documentation	vii		
Chapter 1. Before you begin	1	Chapter 5. Running Monarch from OnDemand	13
Chapter 2. Configuring the client.	3	Chapter 6. Upgrading your OnDemand client	15
Adding the Registry key	3	Appendix. Notices	17
Exporting the Registry key	8	Trademarks and service marks	17
Chapter 3. Configuring Setup	9		
Copying client software	9		
Adding subdirectories	9		

About this publication

This publication provides information about how to integrate Monarch Version 3 with the IBM EDMSuite OnDemand (OnDemand) Windows® 32-bit client. This function allows users to automatically load documents from the OnDemand client into Monarch. The user can then do complex data manipulation from Monarch, such as creating derived columns and generating charts and reports.

Beginning with OnDemand Version 2.2.1.3, an administrator can use the OnDemand Windows 32-bit client installation program to distribute Monarch files with the OnDemand client and configure PCs to run Monarch from the OnDemand client. We recommend that an administrator configure a copy of the OnDemand client software on a *reference workstation*¹ and configure the installation program on a *distribution server*². Each user planning to run Monarch from OnDemand must have the Monarch software installed on their PC before they install or upgrade the OnDemand client with this function.

An administrator can store the Monarch files in the OnDemand Windows 32-bit client installation directory tree on a distribution server. The installation program copies the Monarch files along with the standard OnDemand client files when the user installs the client from the server to the PC. You can distribute several types of files, including:

- Registry files. The installation program imports these files into the Registry on the user's PC. A Registry file named ODMonarch.Reg that contains information about the Monarch DLL for the OnDemand client must be present for the installation program to integrate OnDemand and Monarch on the user's PC.

Important: It is easy to accidentally destroy important data and render a system completely unusable by importing Registry files. Plan to backup the Registry on the user's PC before they run the Setup program.

- Monarch model files. The installation program copies these files to the Monarch\Models directory on the user's PC.

1. A reference workstation contains an installed copy of the OnDemand client with the Monarch DLL defined to OnDemand. An administrator uses configuration information from the reference workstation to distribute software to other users.

2. A distribution server is a network file server that contains a copy of the OnDemand client installation software in a shared location. Other users on the network use the copy to run the OnDemand installation program and install the client from the distribution server to their PCs.

This publication contains the following chapters:

- Before you begin
- Configuring the OnDemand client software
- Configuring the OnDemand Setup program
- Running the OnDemand Setup program
- Running Monarch from OnDemand
- Upgrading your OnDemand client

Who should use this publication

This publication is of primary interest to administrators responsible for installing, configuring, and distributing software products.

How to use this publication

Table 1 shows the steps that you typically need to take to integrate Monarch with OnDemand. This publication describes how to do some of the tasks, but you will need other OnDemand information and your Monarch information to do others.

Table 1. Integrating Monarch with OnDemand: Task List

Task	Where to Find Information
Install Monarch Version 3 software on the reference workstation	Not described in this publication. See your Monarch information. Monarch must be installed before you install the OnDemand client.
Obtain the latest version of the OnDemand Windows 32-bit client software	See “Chapter 1. Before you begin” on page 1 to get version 2.2.1.3 or later of the OnDemand Windows 32-bit client.
Install the OnDemand Windows 32-bit client on the reference workstation	Not described in this publication. See your other OnDemand information.
Add the Registry key that defines the Monarch dynamic link library (DLL) to the OnDemand client	See “Adding the Registry key” on page 3.
Verify the OnDemand and Monarch integration by running the client and invoking Monarch	Not described in this publication. See your other OnDemand information and your Monarch information.
Export the Registry key to a file	See “Exporting the Registry key” on page 8.
Copy OnDemand Windows 32-bit client software to the distribution server	See “Copying client software” on page 9.
Create directories on the server to hold the Monarch files	See “Adding subdirectories” on page 9.

Table 1. Integrating Monarch with OnDemand: Task List (continued)

Task	Where to Find Information
Copy Monarch files to the directories	See “Copying Monarch files” on page 10.
Share the installation directories	See “Sharing the installation directory” on page 10.
Test the Setup program from a user’s PC	See “Chapter 4. Running Setup” on page 11.
Verify the OnDemand and Monarch integration on the user’s PC	See “Chapter 5. Running Monarch from OnDemand” on page 13.

Product support

The IBM Support Center maintains current information about OnDemand, including product updates (PTFs).

Before you install OnDemand, contact the IBM Support Center for information about the latest PTF for OnDemand. (You can obtain the latest PTF from IBM service at <ftp://service.software.ibm.com/software/ondemand/fixes/v221>.)

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 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

Chapter 1. Before you begin

Important: If your organization has integrated Monarch with OnDemand Version 2.2.1.2 or earlier, please see “Chapter 6. Upgrading your OnDemand client” on page 15.

Before you continue, you should have already completed the following tasks:

- Installed Monarch Version 3 on the reference workstation. See your Monarch information for details.
- Obtained the latest PTF for the OnDemand Windows 32-bit client from IBM service on the World Wide Web. To do so, point your Web browser to: <ftp://www.service.software.ibm.com/software/ondemand/fixes/v221> and follow the links to the latest PTF for the client. Click on the odwin32.zip file and save it to disk.

Chapter 2. Configuring the client

This chapter describes how to configure the OnDemand Windows 32-bit client on the reference workstation with the information needed to integrate Monarch with OnDemand. If you have not done so already, install a copy of Monarch Version 3 (see your Monarch information for details). Then install a copy of the OnDemand Windows 32-bit client software (see your other OnDemand information for details). Next, add the Registry key, values, and value data that define the properties of the Monarch DLL to the OnDemand client. Then verify that you have correctly integrated Monarch with OnDemand by starting the OnDemand client, opening a document, and invoking Monarch using the associated menu command or toolbar button. When you are satisfied that everything is working correctly, export the Registry key to a file. The following topics provide more information:

- Adding the Registry key
- Exporting the Registry key

Adding the Registry key

Note: You must install the OnDemand Windows 32-bit client on the reference workstation before you add the Registry key.

Placing information in the Registry activates Monarch integration with the OnDemand client. If during initialization, OnDemand detects this information, it adds menu items and toolbar buttons to the client workspace. When the user chooses one of the menu items or clicks one of the toolbar buttons, OnDemand calls the associated entry point in the Monarch DLL. OnDemand looks in the Registry under the **ExternalDlls** subkey to determine the action to take and other information. Figure 1 on page 4 shows an example of the **ExternalDlls** subkey.

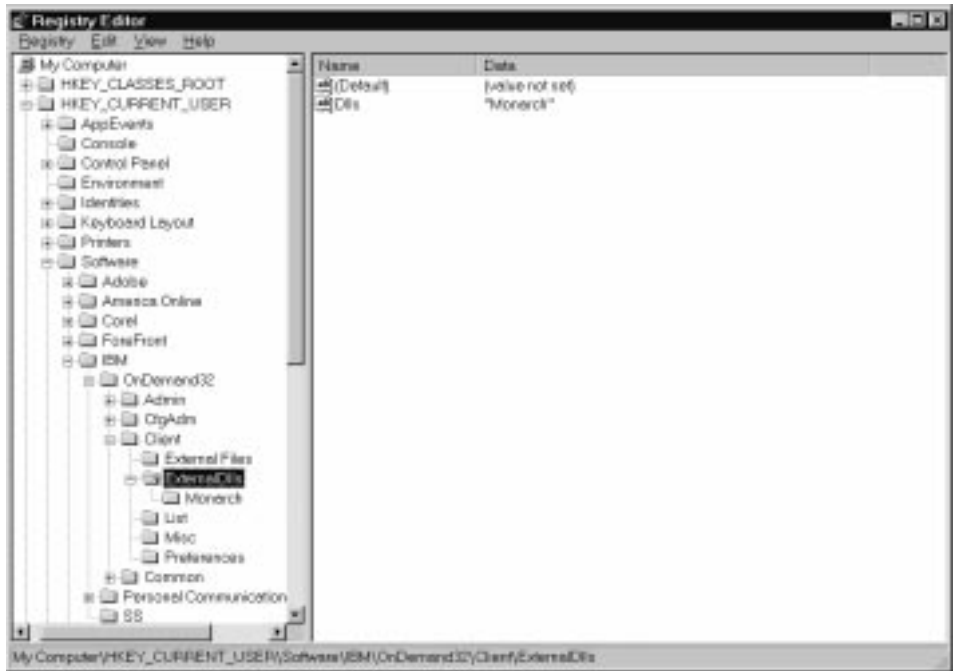


Figure 1. ExternalDlls subkey showing one value in DLLs

Subkeys under **ExternalDlls** contain the information used by OnDemand to call the DLLs integrated into the client. Figure 2 on page 5 shows an example of a subkey that OnDemand can use to call the Monarch DLL.

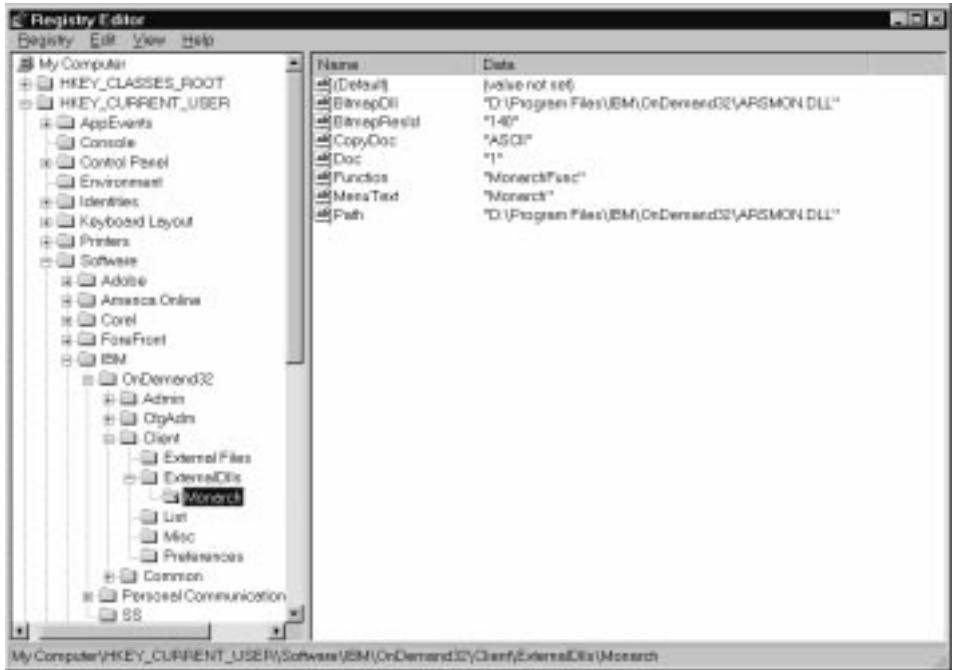


Figure 2. Subkey and values for the Monarch DLL

Table 2 provides information about the subkey values and value data shown in Figure 2. Table 3 on page 7 provides information about other values (that are not depicted in Figure 2) that you may specify.

Table 2. Monarch DLL subkey values

Value and Data	Description
BitmapDll D:\Program Files\IBM\ OnDemand32\ ARSMON.DLL	The full path name of the DLL file that contains the bitmap resource for the toolbar button used to invoke Monarch from the OnDemand client. The example uses the default provided by IBM. However, this DLL file may be different from the DLL file specified for the Path or you can use a different BitmapDll DLL file. The bitmap should be 16 picture elements (pel) wide and 16 pels high. This value is optional. If not provided, a toolbar bitmap will not be created.
BitmapResId 140	The resource identifier of the bitmap within the DLL file specified for BitmapDll . This value is ignored if BitmapDll is not specified and optional if it is. If not provided, a value of 0 (zero) is assumed.

Table 2. Monarch DLL subkey values (continued)

Value and Data	Description
<p>CopyDoc ASCII</p>	<p>Indicates that a copy of one or more documents is to be provided to Monarch and specifies the type of data to be provided. If the value is ASCII, the document data is converted to an ASCII file. If the value is ASIS, the document data is in its native format.</p> <p>If the user chooses the menu item or toolbar button when a document is being viewed, the data provided is for the current document. If the document list is being displayed, the data is a concatenation of all documents selected in the document list.</p> <p>This value is optional. If not provided, no document is provided to Monarch.</p>
<p>Doc 1</p>	<p>May be specified as one of the following values:</p> <ul style="list-style-type: none"> 0 (zero) indicates that enabling the associated menu item and corresponding toolbar button is limited only by the Folders and ExcludeFolders values. See Table 3 on page 7 for information about the Folders and ExcludeFolders values. 1 (one) indicates that the menu item and toolbar button are enabled only when a document is being viewed. 2 (two) indicates that the menu item and toolbar button are enabled only when the document list is being viewed and at least one document is selected. 3 (three) indicates that the menu item and toolbar button are enabled only when a document is being viewed or a document list is being viewed and at least one document is selected. <p>This value is optional. If not provided, a value of 3 (three) is assumed.</p>
<p>Function MonarchFunc</p>	<p>The name of the entry point into the Monarch DLL file. This value must be provided.</p>
<p>MenuText Monarch</p>	<p>The text that appears on the menu item used to invoke Monarch from the OnDemand client. The menu item appears under the Window menu. The text also appears when the user passes the mouse pointer over the associated toolbar button. Note: The text you specify can describe a specific application in Monarch, such as Loan Analysis. This value is optional. If not provided, the menu item is blank.</p>

Table 2. Monarch DLL subkey values (continued)

Value and Data	Description
Path D:\Program Files\IBM\ OnDemand32\ ARSMON.DLL	The full path name of the Monarch DLL file on the user's PC. The example shows the default installation drive and directory. This value must be provided.

Table 3. Other DLL subkey values

Value	Description
ExcludeFolders	<p>Specified the names of one or more OnDemand folders. The syntax is the same as the Folders value.</p> <p>The menu item and toolbar button are enabled whenever:</p> <ul style="list-style-type: none"> • A document is being viewed and the folder associated with the document is not one of the specified folders, or • A document is not being viewed and the current folder is not one of the specified folders. <p>This value is optional. If not provided, enabling is controlled by the Folders value.</p>
Folders	<p>Specifies the names of one or more OnDemand folders. If you specify more than one name, you must separate the names with the backslash (\) character. An asterisk (*) character may be used as a wildcard character in the last position of the name. (This is equivalent to listing all of the folder names that begin with the characters preceding the asterisk.)</p> <p>The menu item and toolbar button are enabled whenever:</p> <ul style="list-style-type: none"> • A document is being viewed and the folder associated with the document is one of the specified folders, or • A document is not being viewed and the current folder is one of the specified folders. <p>This value is optional. If the ExcludeFolders value is provided, this value is ignored. If neither is provided, a folder name test is not performed before enabling the menu item and toolbar button.</p>
Parameters	<p>Specifies a maximum of 255 characters to be passed as parameter data to the DLL. This value is optional. If not provided, no parameter data is passed to the DLL.</p>

To add the Registry key:

1. The **ExternalDlls** subkey contains a list of the DLLs that are integrated with the OnDemand client. It also contains subkeys that define the properties of each DLL. Add the **ExternalDlls** subkey to the following subkey:
HKEY_CURRENT_USER\Software\IBM\OnDemand32\Client
2. Add the value **Dlls** to the **ExternalDlls** subkey. **Dlls** must have a type of String (REG_SZ). The data value of **Dlls** is a comma-separated list of identifiers for the DLLs that are integrated with the OnDemand client. Each identifier in the list must have an associated subkey under **ExternalDlls**. In Figure 1 on page 4, the identifier is **Monarch**.
3. Define the properties of each DLL listed in **Dlls** by adding a subkey under the **ExternalDlls** subkey. (Each subkey that you add must be listed in **Dlls**.) In Figure 1 on page 4, we added the **Monarch** subkey. Define the properties of the DLL by adding the string values to subkey. In the example (see Figure 2 on page 5), we added seven string values.

Exporting the Registry key

After you have added the Registry key that defines the properties of the Monarch DLL to the OnDemand Windows 32-bit client (and tested that you can invoke Monarch from the client), you can export it to a file. Later, you will store the file in the CUSTOM subdirectory tree under the OnDemand Windows 32-bit client installation directory tree on a distribution server. Once you have placed the file there, users installing the OnDemand client will automatically have the Registry key imported into the Registry on their PC when they run Setup from the distribution server. If you have questions about the Registry key, see “Adding the Registry key” on page 3.

Important: If you have other applications integrated with OnDemand (that is, you have DLLs from applications other than Monarch defined under the **ExternalDlls** subkey), contact the IBM support center before you proceed.

To export the Registry key, do the following:

1. Start the REGEDIT program.
2. Move to the
HKEY_CURRENT_USER\IBM\OnDemand32\Client\ExternalDLLs key.
3. From the Registry menu, select Export Registry File.
4. Select a directory to hold the file.
5. In the File Name field, enter: **ODMonarch.Reg**
6. Under Export Range, select Selected Branch.
7. Click Save.

Chapter 3. Configuring Setup

This chapter describes how to configure the OnDemand Windows 32-bit client Setup program to copy your Monarch model files to the user's PC and import the Registry key into the Registry on the user's PC. To begin, extract the latest version of the OnDemand Windows 32-bit client software from the ZIP file to a directory on the distribution server. Then add the custom directories to the OnDemand Windows 32-bit client installation directory tree on the distribution server. Next, copy the Monarch files to the custom directories. Then share the installation directory tree to make it available to your users. The following topics provide more information:

- Copying client software to the distribution server
- Adding custom directories
- Copying the Monarch files to the distribution server
- Sharing the installation directory

Copying client software

Note: See “Chapter 1. Before you begin” on page 1 for information about obtaining the latest OnDemand Windows 32-bit client software.

To copy the OnDemand Windows 32-bit client software to the distribution server:

1. Log on to the server with a userid that has administrator permissions.
2. Extract the contents of the OnDemand Windows 32-bit client ZIP file (odwin32.zip) to a directory on the server. For example, extract the files to the \0D2215 directory.

Important: Use a file extraction method that preserves the ZIP contents directory and file structure on the server.

When complete, the target directory (\0D2215 in the example) should contain the Setup program and files and the ARS directory tree.

Adding subdirectories

You must store the Monarch files in the CUSTOM subdirectory tree under the OnDemand Windows 32-bit client directory tree on the distribution server. By default, the Windows 32-bit client directory tree is ARS32. (If you followed the example in “Copying client software”, the OnDemand Windows 32-bit client directory tree on the distribution server will be \0D2215\ARS32.)

To add subdirectories to hold the Monarch files:

1. Create a CUSTOM directory under the Windows 32-bit client directory. For example:

```
mkdir \od2215\ars32\custom
```

2. Add the following subdirectories to the CUSTOM directory:

\od2215\ars32\custom\registry

To hold the Registry file (ODMonarch.Reg) that you created in “Exporting the Registry key” on page 8. When the user runs the Setup program from the distribution server, it imports this file into the Registry on the PC.

\od2215\ars32\custom\monarch

To hold the Monarch model files that you need to distribute to your users. The Setup program copies the Monarch model files to the Monarch\Models directory on the user’s PC.

Copying Monarch files

After copying the OnDemand client software to the distribution server and creating the CUSTOM directories (see “Adding subdirectories” on page 9), copy the Monarch files to the subdirectories. For example:

- Copy the **ODMonarch.Reg** file that you created in “Exporting the Registry key” on page 8 to the \OD2215\ARS32\CUSTOM\REGISTRY directory
- Copy your Monarch model files to the \OD2215\ARS32\CUSTOM\MONARCH directory

Sharing the installation directory

After you copy the OnDemand client software to the distribution server, create the CUSTOM directories, and copy the Monarch files to the server, you must make the installation directories on the server available to your users. The procedure differs for each network and operating system. However, you generally need to provide users with read-only access to the directories. If applicable for your network, share the folders by giving the folder location on the distribution server a network name (share name). For example, to permit users to run the Setup program from the \OD2215 directory on the server and access all of the files in the \OD2215\ARS32 directory tree, you could assign the share name ODMONAR to the \OD2215 directory.

Chapter 4. Running Setup

Note: Before your users run the Setup program from the distribution server to install the OnDemand client and integrate Monarch with the client, they must have a copy of Monarch Version 3 installed on their PCs.

After you have configured the Setup program on the distribution server with the Registry key and your Monarch model files, you can test the installation by having a user run the Setup program from the distribution server.

Important: It is easy to accidentally destroy important data and render a system completely unusable by importing Registry files. Plan to backup the Registry on the user's PC before they run the Setup program.

When the user selects the Typical or Compact option during install, the Setup program automatically copies the Monarch files to the PC.

When the user selects the Custom option during install, the Setup program copies the Monarch files to the PC **if the user selects to install one of the clients**. If the user does not select one of the clients, then the Setup program does not copy the Monarch files to the PC. For example, if the user selects the Custom option and chooses to install only the Sonoran Fonts or the administrative client, the Setup program does not copy the Monarch files to the PC; if the user selects the Custom option and chooses to install the US English client, then the Setup program copies the Monarch files to the PC.

Chapter 5. Running Monarch from OnDemand

After your users install the OnDemand Windows 32-bit client from the distribution server, they should test that everything works correctly. Have them start the OnDemand client, open a document, and then start Monarch using the associated menu command or toolbar button. Monarch should start and load the document into a separate window.

Chapter 6. Upgrading your OnDemand client

If your organization has integrated Monarch with OnDemand Version 2.2.1.2 or earlier, follow these important instructions before your users upgrade the client to OnDemand Version 2.2.1.3 or later:

- Copy your old Registry file (for example, ODMonarch.Reg) to the CUSTOM\REGISTRY directory on the distribution server.
If the old Registry file does not exist, follow the steps in “Chapter 2. Configuring the client” on page 3 to create one. Then copy the Registry file to the CUSTOM\REGISTRY directory on the distribution server.
- Copy your Monarch model files to the CUSTOM\MONARCH directory on the distribution server.

Appendix. Notices

References in this publication to products or services of IBM do not suggest or imply that IBM will make them available in all countries where IBM does business or that only products or services of IBM may be used. Noninfringing equivalents may be substituted, but the user must verify that such substitutes, unless expressly designated by IBM, work correctly. No license, expressed or implied, to patents or copyrights of IBM is granted by furnishing this document. You can send license inquiries, in writing, to the Director of Licensing, IBM Corporation, 500 Columbus Avenue, Thornwood, NY 10594, USA.

Licensees of this program who wish to have information about it for the purpose of enabling: (1) the exchange of information between independently created programs and other programs (including this one) and (2) the mutual use of the information, which has been exchanged, should contact: SWS General Legal Counsel, IBM Corporation, Department TL3 Building 062, P.O. Box 12195, Research Triangle Park, NC 27709-2195 USA. Such information may be available, subject to appropriate terms and conditions, including in some cases, payment of a fee.

Trademarks and service marks

IBM is a trademark of International Business Machines Corporation in the United States, other countries, or both.

Microsoft[®] and Windows are registered trademarks of Microsoft Corporation in the United States, other countries, or both.

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