Interact Business Services

Installation and Setup Guide

Perceptive Content Version: 7.1.x

Written by: Product Knowledge, R&D
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perceptivesoftware
from Lexmark

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Perceptive Interact Business Services

Perceptive Interact Business Services is a plugin for the Perceptive Integration Server that communicates requests from mobile clients it supports to Perceptive Integration Server and delivers responses to the mobile clients received from Integration Server. Integration Server communicates requests from Perceptive Interact Business Services to Perceptive Content Server and delivers the response from Perceptive Content Server to Perceptive Interact Business Services. The Perceptive Interact Business Services displays the response to the supported mobile clients. Depending on the Perceptive Content Server response, an end user of a supported mobile client may view documents, update forms and route queue items in a workflow or put queue items on hold for a specified duration. The Perceptive Interact Business Services are available on mobile devices with such operating systems as Android, iOS and Windows 8.

Perceptive Interact Business Services installation process

During this installation, you perform the following procedures:

- Install Perceptive Integration Server if it is not already installed on your system. This is how Perceptive Interact Business Services communicates with Perceptive Content Server. For information about installing Perceptive Integration Server, refer to the *Perceptive Integration Server Installation and Setup Guide.*
- Download the Perceptive Interact Business Services installation file.
- Install Perceptive Interact Business Services.
- Verify the Perceptive Interact Business Services installation.

Prepare for the installation

For product technical specifications and system requirements, refer to the *Technical Specifications* document for this product version.

Important If you are operating with a 32-bit Web application server, ensure that you have the 32-bit version of Perceptive Integration Server installed before you install Interact Business Services. If you are operating with a 64-bit Web application server, ensure that you have the 64-bit version of Perceptive Integration Server installed before you install Interact Business Services.

Install Perceptive Interact Business Services on Windows

Use the following instructions to install Perceptive Interact Business Services on Windows.

Note Perceptive Interact Business Services must be installed on the same server as Perceptive Integration Server.

Download the Perceptive Interact Business Services installation file

Perform the following steps on a computer that has access to Perceptive Content Server.

1. Go to the Perceptive Software website at www.perceptivesoftware.com and log in to the Customer Portal.
2. In the **Product Downloads** page, search for all downloadable items for the specific product and version you want to use. These files may include a product installer, product documentation, or set of supporting files.
3. Download the relevant files to a temporary directory on your computer.

Install Perceptive Interact Business Services

The following steps explain how to run the installation wizard for Interact Business Services for Windows.

1. Stop your web application server.
2. Double-click the **EXE** file you downloaded.
3. In the **Welcome to the Installation Wizard for Interact Business Services** page, click **Next**.
4. On the **License Agreement** page, review the terms in the License Agreement, scroll to the end of the agreement, click **I accept the terms in the license agreement** and click **Next**.
5. In the **Ready to Install the Program** page, click **Install**.
6. In the **Installation Wizard Completed** page, click **Finish**.
7. Restart your web application server.

Install Perceptive Interact Business Services on UNIX

Use the following instructions to install Perceptive Interact Business Services in a UNIX environment. It must be installed on the same server as Perceptive Integration Server.

Install Perceptive Interact Business Services in a UNIX environment

The following steps explain how to install Interact Business Services in a UNIX environment.

1. Stop your web application server.
2. Extract the JAR files from the ZIP file that you downloaded.
3. From the temporary directory where you downloaded the JAR files, copy the files and place them in the **[path]/${TOMCAT_HOME}/webapps/integrationserver/WEB-INF/lib** directory.
4. Restart your web application server.

Note The IBSP is within the Tomcat server and the URL to access the IBSP is [path]/integrationserver/mobile.

Verify the Perceptive Interact Business Services Install

The following sections contain the steps to verify a successful installation of Perceptive Interact Business Services. The steps involved in the verification include:

- Connect to Perceptive Content from a mobile device.
- Connect to Perceptive Mobile.
- View a document on the mobile device.
- Route a document to a different queue.

Connect to Perceptive Content from an Android mobile device

To log in to Perceptive Content, perform the following steps:

1. On the home screen of the mobile device, tap the **Perceptive** icon.
2. In the **Server URL** box, under the **Connection Settings** screen, type the Perceptive Interact Business Service Plugin URL and tap **OK**.
3. Optional: Tap the **Use Secure Connection** check box to use a secured protocol.
4. In the **User** name box under the **Interact Mobile** screen, enter the user name.
5. In the **Password** box, enter your password.
6. Tap **Connect**. The list of workflow processes appears.

Note The Perceptive Interact Business Services plugin URL is *<Host>:port/integrationserver/mobile*.

After verifying the installation, see the Interact Business Services Help for more information about using this product.

Connect to Perceptive Content from a mobile iOS device

To log in to Perceptive Content from an iOS device, complete the following steps.

1. In the application launcher screen of your device, tap the **Settings** icon.
2. In the **Settings** page, tap **Interact Mobile**.
3. In the **Interact Mobile** page, under **Connection Settings**, type the Perceptive Interact Business Services URL in the **Server URL** box.
4. On the home screen of your device, tap the **Perceptive** icon to launch the application.
5. In the log-in screen, confirm or enter the user name in the **User Name** box and enter your password in the **Password** box.
6. Tap **Connect**.

Notes

- If you are unable to connect to the server, verify that you entered your user name and password and server URL correctly.
- To log in to a different server, go to the iOS Settings menu and select **Perceptive**. Under **Connection**, select **Server URL** to enter the Server name or URL.

Connect to Perceptive Content from a Perceptive Mobile for Windows device

To log in to Perceptive Content from a Perceptive Mobile for Windows device, complete the following steps.

1. In the application launcher screen of your device, tap the **Interact Mobile** icon.
2. In the login screen, swipe in from the right edge of the screen and tap **Settings>Server** settings.
3. In the **Server Settings** panel, under the **Server URL** box, type the Perceptive Interact Business Services server URL.
4. To save the connection settings, tap once anywhere on the Server Settings panel or on the login screen.
5. On the Windows 8 Start screen, tap the Perceptive icon to launch the application.
6. In the log-in screen, confirm or enter the user name in the **User Name** box and enter your password in the **Password** box.
7. Tap **Connect**.

Notes

- If you are unable to connect to the server, verify that you entered your user name, password and server URL correctly.
- To log in to a different server, swipe in from the right edge of the screen to show the contracts menu, and then tap the **Settings> Server settings** option to configure the Server name or URL.