TradingXpert Installation Guide

Sun™ ONE Integration Server, B2B

Version 3.6.2

Contents

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Preface

This book explains how to install Sun™ Open Net Environment (Sun ONE) Integration Server, B2B Edition software (TradingXpert 3.6.2), and this preface contains the following sections:

- Audience for This Guide
- Organization of This Guide
- Conventions
- Other Documentation Resources

Audience for This Guide

The audience for this guide is ECXpert administrators who wish to install a TradingXpert front end to ECXpert. TradingXpert enables browser-based users to interact with business partners through an ECXpert system.

This guide assumes the reader has a general understanding of ECXpert functions and is familiar with ECXpert administration tasks.

Organization of This Guide

All users should read the introduction and then the appropriate platform-specific chapter. The following table briefly describes the contents of each chapter:

Table 1   Book Contents

Chapter	Description
Chapter 1, "Introduction"	Explains the TradingXpert software dependencies, what the installer does, and where TradingXpert software modules are installed.
Chapter 2, "Solaris Installation"	Describes installation of TradingXpert software on the Solaris platform, including any pre-installation and post-installation configuration tasks that have to be performed.
Chapter 3, "Windows Installation"	Describes installation of TradingXpert software on the Windows platform, including any pre-installation and post-installation configuration tasks that have to be performed.
Chapter 4, "Testing Your TradingXpert Installation"	Explains how to test your TradingXpert installation using an example test scenario.

Conventions

This section provides information about the conventions used in this document.

Text Conventions

Table 2   Document Conventions

Format	Description
italics	Italicized text represents a placeholder. Substitute an appropriate clause or value where you see italic text. Italicized text is also used to designate a document title, for emphasis, or for a word or phrase being introduced.

Table 2   Document Conventions *(Continued)*

Format	Description
`monospace`	Monospace text represents example code, commands that you enter on the command line, directory, file, or path names, error message text, class names, method names (including all elements in the signature), package names, reserved words, and URL's.
`[ ]`	Square brackets to indicate optional values in a command line syntax statement.
ALL CAPS	Text in all capitals represents file system types (GIF, TXT, HTML and so forth), environment variables (IMQ_HOME), or acronyms (TradingXpert, JSP).
Key+Key	Simultaneous keystrokes are joined with a plus sign: Ctrl+A means press both keys simultaneously.
Key-Key	Consecutive keystrokes are joined with a hyphen: Esc-S means press the Esc key, release it, then press the S key.

Directory Variable Conventions

TradingXpert documentation makes use of two directory variables whose values depend on platform and on the version of application server in which TradingXpert is deployed. Table 3 describes these variables and summarizes how they are used.

Table 3   TradingXpert Directory Variables

Variable	Description
BDGHOME	This is an ECXpert environment variable that points to the location of the ECXpert installed software.
	BDGHOME = *Root_ECX_Install*/NS-apps/ECXpert
	where *Root_ECX_Install* is the root installation directory of ECXpert software.

Table 3   TradingXpert Directory Variables *(Continued)*

Variable	Description
`TX_HOME`	This is used in TradingXpert documentation to refer to the root TradingXpert installation directory. The directory depends upon the version of Sun ONE Application Server in which TradingXpert is being deployed.
	Sun ONE Application Server 6.5:
	TX_HOME = *Root_AS_Install*/APPS/FX
	where *Root_AS_Install* is the root installation directory of the Application Server 6.5 software. For details of the installed TradingXpert software, see "TradingXpert Directory Structure: Application Server 6.5" on page 26.
	Sun ONE Application Server 7.0:
	TX_HOME = *arbitrary installation directory*
	You can select any directory in which to install TradingXpert files. For details of the installed TradingXpert software, see "TradingXpert Directory Structure: Application Server 7.0" on page 28.

In this guide, TX_HOME and BDGHOME are shown *without* platform-specific environment variable notation or syntax (for example, $BDGHOME on UNIX). All path names use UNIX file separator notation (/).

Other Documentation Resources

In addition to this guide, TradingXpert provides additional documentation resources.

The TradingXpert Documentation Set

The documents that comprise the TradingXpert documentation set are listed in Table 4 in the order in which you would normally use them.

Table 4   TradingXpert Documentation Set

Document	Audience	Description
TradingXpert Installation Guide	Administrators	Explains how to install TradingXpert software on Solaris and Windows platforms.
TradingXpert Release Notes	Administrators and developers	Includes descriptions of new features, limitations, and known bugs, as well as technical notes.
TradingXpert Administrator's and Developer's Guide	Users, administrators, and developers	Provides a quick-start tutorial for users, customizing instructions for administrators, and programming information for developers.

Other Documentation Resources

Introduction

This chapter provides an overall introduction to installing the TradingXpert product. The topics covered are:

- "TradingXpert Software Dependencies"
- "TradingXpert/ECXpert Configurations" on page 22
- "Installed TradingXpert Software" on page 25
- "Upgrading to Version 3.6.2" on page 30

TradingXpert Software Dependencies

TradingXpert provides a browser-based front end for ECXpert. It is used to support ECXpert trading partners that do not have Electronic Data Interchange (EDI) processing capability. TradingXpert makes it possible for these partners to use ECXpert to submit HTML formatted documents to their partners and retrieve similarly formatted documents from them.

To perform these document exchange functions, TradingXpert has critical dependencies on a number of external software systems, as illustrated in Figure 1-1:

ECXpert   TradingXpert is a front end for ECXpert, submitting documents to ECXpert for processing and retrieving documents processed by ECXpert. TradingXpert relies upon the dispatching, data transformation, and partner management support provided by ECXpert.

Oracle DBMS   In addition to interacting with ECXpert to submit documents, TradingXpert accesses the ECXpert Oracle database (in which ECXpert partnership and tracking information is stored) to retrieve documents processed by ECXpert.

Figure 1-1   TradingXpert Software Dependencies
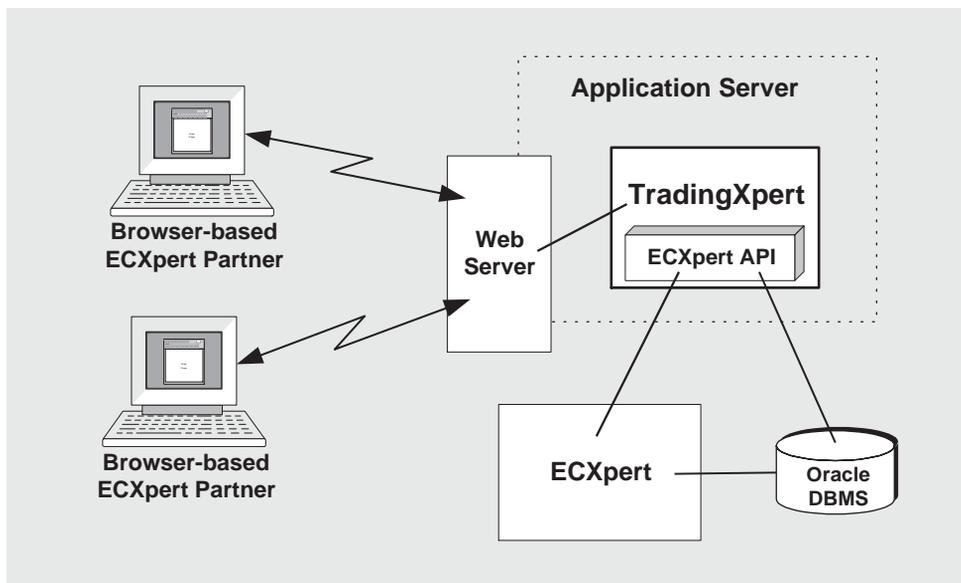
Application server   TradingXpert runs in an application server environment. (Note in the "TradingXpert 3.6.2 Product Support Matrix," Table 1-1 on page 20, that both versions 6.5 and 7.0 of the Sun ONE Application Server are supported, resulting in some differences in the installed TradingXpert files.)

Web server   A web server is required to support the interaction of browser-based ECXpert partners with TradingXpert—for receiving and sending of HTML formatted documents. The web server can be integrated with the application server (as in Sun ONE Application Server 7.0) or be a stand-alone product (as in Sun ONE Web Server 6.0).

Table 1-1 shows the supported versions for TradingXpert software dependencies, including those illustrated in Figure 1-1.

Table 1-1   TradingXpert 3.6.2 Product Support Matrix

Platform/Product	Used For	Supported Platform/Product Version[1]
ECXpert	Dispatching and transforming documents and managing trading partners.	ECXpert 3.6.2

Table 1-1 TradingXpert 3.6.2 Product Support Matrix *(Continued)*

Platform/Product	Used For	Supported Platform/Product Version[1]
Oracle database	ECXpert dependency: Storing partnership and process tracking data.	Oracle 8i, version 8.1.7
Application server	TradingXpert runtime environment	Sun ONE Application Server • Enterprise Edition, 6.5 • Standard Edition (SE), 7.0
Web browser	Accessing TradingXpert from a browser-based ECXpert partner	Netscape 4.79, 6.2, or higher
Sun ONE Application Server, Enterprise Edition, 6.5 Environment		
Web server	Accessing TradingXpert from a browser-based ECXpert partner	Sun ONE Web Server, Enterprise Edition 6.0 SP5
Java Runtime Environment (JRE)	Application server support	JDK/JRE 1.3.1_02[2]: • Solaris 2.6, 7, and 8 • Windows NT 4.0 SP 6a and Windows 2000 Professional and Server SP 3
Java Software Development Kit (JDK), Standard Edition	Compiling TradingXpert Java programs	Version 1.3.1_02: • Solaris 2.6, 7, and 8 • Windows NT 4.0 SP 6a and Windows 2000 Professional and Server SP 3
Sun ONE Application Server, Standard Edition, 7.0 Environment		
Java Runtime Environment (JRE)	application server support	JDK/JRE 1.4.0_02[3]: • Solaris 2.6, 7, and 8 • Windows NT 4.0 SP 6a and Windows 2000 Professional and Server SP 3
Java Software Development Kit (JDK), Standard Edition	Compiling TradingXpert Java programs	Version 1.4.0_02: • Solaris 2.6, 7, and 8 • Windows NT 4.0 SP 6a and Windows 2000 Professional and Server SP 3

1. Check the *ECXpert Release Notes* for any updates to supported versions

2. Download this JDK from: http://java.sun.com/j2se/1.3/index.html

3. Download this JDK from: http://java.sun.com/j2se/1.4/index.html

TradingXpert 3.6.2 is supported on Solaris and Windows operating systems and platforms. The hardware and software requirements for these platforms are specified in their respective platform-specific chapters of this book.

TradingXpert/ECXpert Configurations

When installing TradingXpert, there are two basic configurations (see Figure 1-2): TradingXpert and ECXpert installed on the same host machine or on different machines. If TradingXpert and ECXpert are running on different machines, then both must be running the same operating system platform: Solaris or Windows.

Figure 1-2   TradingXpert/ECXpert Configurations
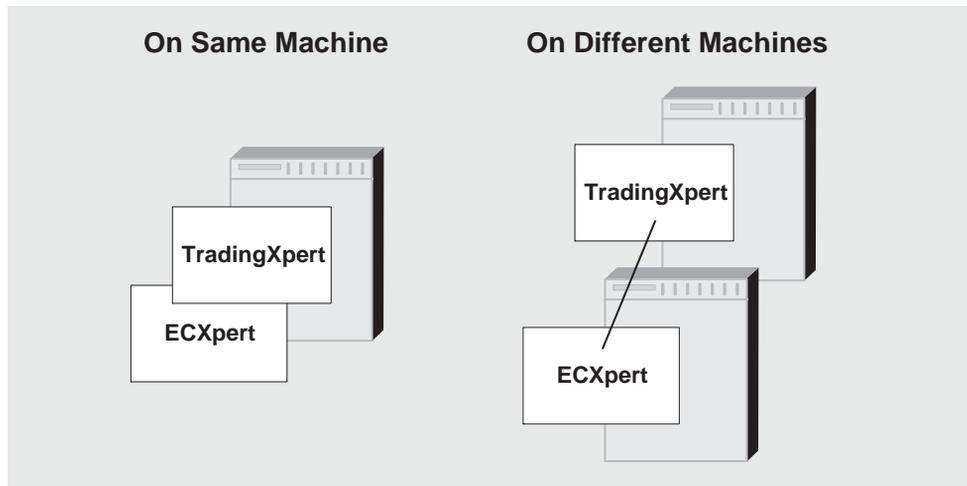
Running TradingXpert on a machine different from ECXpert requires a few additional configuration tasks compared to running both on the same machine (see "Configuring TradingXpert to Run on a Different Machine from ECXpert" on page 37 for the Solaris platform and "Configuring TradingXpert to Run on a Different Machine from ECXpert" on page 54 for the Windows platform). Both machines need to run the same operating system.

About the TradingXpert Installer

You install the TradingXpert 3.6.2 product using the software distribution provided on the Sun ONE Integration Server, B2B Edition CD-ROM set. For detailed instructions, see the platform-specific procedures in subsequent chapters.

Installer Dependencies

The software systems on which TradingXpert depends should be installed prior to running the TradingXpert installer. This allows you to configure these systems to support TradingXpert. The following software should be installed before installing TradingXpert:

- ECXpert

  Make sure you have a functioning ECXpert installation (including its associated Oracle database). See the *ECXpert Installation Guide* for more information.

- Application server

  TradingXpert is deployed into an application server environment, making the application server a prerequisite to installing TradingXpert.

- Web server (should be independently installed if it is not already integrated with the application server—for example, Sun ONE Application Server 7.0 has a built in web server.)

What the TradingXpert Installer Does

There are two TradingXpert installers: one for Application Server 6.5 environments and one for Application Server 7.0 environments. Each of these installers performs different operations.

Application Server 6.5 Environment

The TradingXpert installer sets up a directory structure and copies TradingXpert files into those directories (see "TradingXpert Directory Structure: Application Server 6.5" on page 26). The installer also registers TradingXpert with the Application Server, and (on Solaris platforms) modifies the Application Server classpath.

However, the installer does not perform any configuration of TradingXpert to inter-operate with ECXpert or the web server. Once TradingXpert software is installed, therefore, you have to manually perform the following configurations (see "Configuration Tasks (Application Server 6.5)" on page 35 for Solaris and "Configuration Tasks (Application Server 6.5)" on page 49 for Windows):

- modify the TradingXpert configuration file (FXproperties) to point to the root TradingXpert installation directory and to the ECXpert configuration file

- configure the web server instance used by TradingXpert to use the "TX" URL prefix required by TradingXpert

- copy TradingXpert map files, as needed, to the appropriate ECXpert map directory

- optionally, configure TradingXpert to run on a different host machine from ECXpert (as shown in "TradingXpert/ECXpert Configurations" on page 22).

Application Server 7.0 Environment

TradingXpert installation places TradingXpert files into two directory trees (see "TradingXpert Directory Structure: Application Server 7.0" on page 28). It also modifies the TradingXpert configuration file (FXproperties) to point to the root TradingXpert installation directory and to the ECXpert configuration file.

Once the TradingXpert installer completes its work, you have to manually perform the following configurations (see "Configuration Tasks (Application Server 7.0)" on page 44 for Solaris and "Configuration Tasks (Application Server 7.0)" on page 63 for Windows):

- Windows only: deploy the TradingXpert Web Archive File (TX.war) using Sun ONE Application Server 7.0 tools

- copy TradingXpert map files, as needed, to the appropriate ECXpert map directory

- optionally, configure TradingXpert to run on a different host machine from ECXpert (as shown in "TradingXpert/ECXpert Configurations" on page 22).

Installed TradingXpert Software

The software installed by the TradingXpert installer consists of a number of different modules, as described in "TradingXpert Software Modules," below. These modules are placed in a directory structure outlined in "Installed Directory Structure" on page 25.

TradingXpert Software Modules

Table 1-2 identifies the software modules included with the TradingXpert product.

Table 1-2   TradingXpert Software Modules

Module	Contents
Forms	HTML forms used to view standard EDI document types. These use tags to insert data.
Graphical User Interface (GUI)	HTML templates and code used to implement browser screens in TradingXpert's Trade Center user interface.
Java programs	Programs (and corresponding source code) that enable TradingXpert operations. Many of these use the ECXpert API to submit documents to ECXpert and to access and update data in the ECXpert Oracle database.
ECXpert API	An implementation of the ECXpert API that is used by TradingXpert's Java programs.
Maps	Software used to transform EDI-formatted documents to TradingXpert format (name-value pairs) and *visa versa*.
Logger	Software that tracks, logs, and reports TradingXpert activity.

Installed Directory Structure

The placement of files by the TradingXpert installer depends upon the version of application server in which TradingXpert is deployed:

- Sun ONE Application Server 6.5

- Sun ONE Application Server 7.0

The following sections show the installed directory structure for each.

TradingXpert Directory Structure: Application Server 6.5

Table 1-3 shows the installed directory structure for a TradingXpert installation. All subdirectories are under the TX_HOME directory (see "Directory Variable Conventions" on page 15 for the definition of TX_HOME).

Table 1-3   TradingXpert Installed Directory Structure

Subdirectory	Contents
./common	Common Java programs (and source) used to support all TradingXpert operations, including access to ECXpert and the ECXpert Oracle database. Also includes the TradingXpert configuration file (FXproperties).
./document	Java programs (and source) used to retrieve, manage, and process documents in response to Trade Center button clicks. Also includes a working directory for processing document files.
./events	Java programs (and source) used to support e-mail notification of inbound and outbound documents that have reached their expiration dates.
./forms/en_us	HTML forms and data for displaying documents:
	/default Location for default forms (.html) representing EDI document types, as well as rules files (.rules) used for document turnarounds and order files (.order) used to assist ECXpert mapping. Subdirectories can contain files customized to various partners.
	/from_scratch_data Data files (.dat) used to provide default values for from-scratch documents.
./login	Java programs (and source) used to log in to ECXpert and return the opening Trade Center screen.

Table 1-3   TradingXpert Installed Directory Structure *(Continued)*

Subdirectory	Contents
./maps_etc	Map files and other assorted files used to support TradingXpert operations:
	/customization Sample customization files demonstrating creation of a new "cinfo" document type for processing by TradingXpert.
	/import Data files containing ECXpert setup information (memberships, partnerships, and service lists) used in testing TradingXpert installation.
	/map_sources Source code (in .zip format) that can be used to customize TradingXpert maps.
	/maps/*platform* Maps for all document types supported (by default) by TradingXpert, where *platform* is nt and/or solaris.
	/newmember Java programs (and source) used to support new member self-registration.
	/reports Java programs (and source) used to support tracking and reporting of document status.
	/sampledata Example data files to demonstrate various TradingXpert customizations.
./profile	Java programs (and source) used to access and update ECXpert membership information.
./templates/en_us	Dynamic HTML templates used to implement screens in the Trade Center user interface.
./tradeCenter	Java programs (and source) used to implement operations in the main Trade Center screen.
./users	Location for user-specific information. User-specific subdirectories contain files such as document templates created by users in the Trade Center user interface.
./web/en_us	Static HTML templates used to implement screens in the Trade Center user interface.

TradingXpert Directory Structure: Application Server 7.0

TradingXpert files are installed in two separate locations: a J2EE module directory and a TradingXpert application directory. In this structure, the TradingXpert Java programs that enable TradingXpert operations are placed in a different location than their corresponding source code, and customizable files are separated from static user interface components.

J2EE Module Directory

The J2EE module directory is created automatically when the TradingXpert Web Archive file (`TX.war`) is deployed to the application server. It contains the subdirectories shown in Table 1-4 within the following application server directory path:

> *Root_AS_Install*/domains/domain1/*appServer_instance*/applications/
>   J2EE-modules/TX_1

where *Root_AS_Install* is the root installation directory for the application server and *appServer_instance* is the name of an application server instance you create to support TradingXpert.

Table 1-4   Installed J2EE Module Directory Structure

Subdirectory	Contents
`./web/en_us`	Static HTML templates used to implement screens in the Trade Center user interface.
`./WEB-INF`	Contains a `web.xml` file that references files installed in the TradingXpert application directory (Table 1-5 on page 29) plus the following subdirectories:
	`/classes` Java program files that enable TradingXpert operations
	`/lib` ECXpert API libraries (`ecxsdkjni.jar`) used by Java program files.

TradingXpert Application Directory

The TradingXpert application directory structure is created when you install TradingXpert into a TX_HOME directory of your choice. Table 1-5 shows the installed subdirectory structure under TX_HOME:

Table 1-5   Installed Application Directory Structure

Subdirectory	Contents
./config	Contains the TradingXpert configuration file (FXproperties).
./document	Working directory for processing document files.
./forms/en_us	HTML forms and data for displaying documents:
	/default Location for default forms (XSL stylesheets) representing EDI document types, as well as rules files (.rules) used for document turnarounds and order files (.order) used to assist ECXpert mapping. Subdirectories can contain files customized to various partners.
	/from_scratch_data Data files (.dat) used to provide default values for from-scratch documents.
./lib	ECXpert API native libraries.
./maps_etc	Map files and other assorted files used to support TradingXpert operations:
	/customization Sample customization files demonstrating creation of a new "cinfo" document type for processing by TradingXpert.
	/import Data files containing ECXpert setup information (memberships, partnerships, and service lists) used in testing TradingXpert installation.
	/map_sources Source code (in .zip format) that can be used to customize TradingXpert maps.
	/maps/*platform* Maps for all document types supported (by default) by TradingXpert, where *platform* is nt and/or solaris.
	/newmember Java programs (and source) used to support new member self-registration.
	/reports Java programs (and source) used to support tracking and reporting of document status.
	/sampledata Example data files to demonstrate various TradingXpert customizations.

Table 1-5   Installed Application Directory Structure *(Continued)*

Subdirectory	Contents
`./src`	Source code corresponding to Java programs that enable TradingXpert operations: `/document` Source code for Java programs used to retrieve, manage, and process documents in response to Trade Center button clicks. `/events` Source code for Java programs used to support email notification of inbound and outbound documents that have reached their expiration dates. `/login` Source code for Java programs used to log in to ECXpert and return the opening Trade Center screen. `/profile` Source code for Java programs used to access and update ECXpert membership information. `/tradeCenter` Source code for Java programs used to implement operations in the main Trade Center screen.
`./templates/en_us`	Dynamic XSL style sheets used to implement screens in the Trade Center user interface.
`./users`	Location for user-specific information. User-specific subdirectories contain files such as document templates created by users in the Trade Center user interface.

Upgrading to Version 3.6.2

TradingXpert 3.6.2 is fully compatible with TradingXpert 3.6.1 and earlier versions, unless it is installed in a Sun ONE Application Server 7.0 environment. In that case, the software is installed in a different location, and any previously customized forms will not only need to be copied to the new location, but will also need to be modified as described in the *TradingXpert Release Notes*.

TradingXpert 3.6.2 is also compatible with ECXpert 3.6.1 and earlier versions, and with their respective versions of Oracle database.

When upgrading an earlier version of TradingXpert to Version 3.6.2, you should first back up all customized files, install Version 3.6.2, and then place the customized files in their correct respective locations in the TradingXpert or ECXpert directory structure.

Solaris Installation

This chapter provides the information required to install and configure TradingXpert software on the Solaris platform. Aside from having common hardware and software requirements, installation and configuration of TradingXpert depends upon whether the product is being deployed in a Sun ONE Application Server 6.5 or a Sun ONE Application Server 7.0 environment. Hence, this chapter is broken down into the following sections:

- "Hardware and Software Requirements"

- "Installing TradingXpert in a Sun ONE Application Server 6.5 Environment" on page 32

- "Installing TradingXpert in a Sun ONE Application Server 7.0 Environment" on page 40

Hardware and Software Requirements

The minimum requirements for installing TradingXpert on a Solaris platform are indicated in Table 2-1.

Table 2-1   Hardware and Software Requirements for Solaris

Component	Requirements
Operating system	Solaris 2.6, 7, and 8
CPU	Sun Ultra™ 1 (or compatible) workstation that is TCP/IP networked
RAM	512 Mbytes
Hard drive space	The installed product requires approximately 200 Mbytes Document storage might require up to 6 Gbytes.

Table 2-1   Hardware and Software Requirements for Solaris *(Continued)*

Component	Requirements
Other dependent software	See Table 1-1 on page 20 for the supported versions of the Java Runtime Environment (JRE), Java Software Development Kit (JDK), Oracle, and supported versions of other software products on which TradingXpert depends.

Installing TradingXpert in a Sun ONE Application Server 6.5 Environment

This section, specific to the Sun ONE Application Server 6.5, covers the following topics:

- Pre-Installation Tasks

- Installation Steps

- Configuring a TradingXpert Installation

Pre-Installation Tasks (Application Server 6.5)

You should perform the following tasks before installing TradingXpert in a Sun ONE Application Server 6.5 environment. These tasks should be performed under the same non-root user account: the ECXpert administrator account (for example, ecxadmin).

1. Check that all hardware and software requirements (Table 2-1 on page 31) are met by your Solaris system.

2. Install ECXpert 3.6.2 and check that it is running properly. In particular, make sure that Oracle is up and running and that the BDGHOME environment variable is set on the ECXpert host machine (see "Checking the BDGHOME Environment Variable" on page 33).

   If ECXpert is running on a host machine different from the one on which TradingXpert is to be installed, then you will have to perform additional setup operations for TradingXpert to run in this configuration (see "Configuring TradingXpert to Run on a Different Machine from ECXpert" on page 37).

3. Check that Sun ONE Web Server 6.0 is installed and configured properly.

   If Sun ONE Web Server 6.0 has not previously been installed, install it and create an instance that will receive requests from TradingXpert's browser-based user interface (see "Creating a Web Server Instance for TradingXpert").

4. Check that Sun ONE Application Server 6.5 is installed and configured properly.

   If Sun ONE Application Server 6.5 has not previously been installed, install it, and configure it to communicate with the Sun ONE Web Server instance to be used by TradingXpert (see your application server documentation for procedures).

Checking the BDGHOME Environment Variable

The value of the BDGHOME environment variable (see Table 3 on page 15) must be properly set on the ECXpert host computer.

1. Check for BDGHOME.

   The value of BDGHOME should be the full path to your ECXpert installed directory structure (see Table 3 on page 15).

2. If BDGHOME has not been properly set:

   setenv BGDHOME *Root_ECX_Install*/NS-apps/ECXpert

   where *Root_ECX_Install* is the root installation directory of ECXpert software.

Creating a Web Server Instance for TradingXpert

1. Launch the Sun ONE Web Server's Administration Server.

2. Enter the Administration Console URL:

   http://*web_server_host*:*port*

   where *web_server_host* is the name of your web server's host computer, and *port* is the number of the port used for web server administration.

3. Log in under the web server administrator account.

   The Administration Console window opens up.

4. Click Add Server.

5. Enter the Server Name.

   This is the web server's host computer (*web_server_host*)

6. Enter the Server Port.

    This is the number of the port on which the web server instance will be
    listening for requests from the TradingXpert browser-based user interface.

7. Enter the Server Identifier.

    Use an instance identifier such as `tradingx`

8. Click OK.

9. Click Configure Your New Server.

10. Turn on the new server instance.

    A success window confirmation appears.

11. Click OK.

Installation Procedures (Application Server 6.5)

Installation of TradingXpert requires you to locate the software distribution files in
the Sun ONE Integration Server, B2B Edition CD-ROM set and run the
TradingXpert install script.

➤ **To run the TradingXpert installation script**

1. Log in under the same user account (for example, `ecxadmin`) that was used to
    install ECXpert, Sun ONE Web Server 6.0, and Sun ONE Application Server
    6.5.

2. Insert the Sun ONE Integration Server B2B Edition 3.6.2 Solaris CD-ROM into
    your CD-ROM drive.

3. Change directories to the directory on the CD-ROM which contains the
    `install_all` file:

    `/TradingXpert3.6.2/install_bits/TX_for_AppServer6.5/`

4. Type the following command at the command prompt:

    `install_all`

    The installer script requests that you enter the following values:

    ❍   the directory (*Root_AS_Install*) where Application Server 6.5 is installed.
        Enter the full path. There is no default value.

    ❍   the ECXpert version supporting TradingXpert
        Enter the value `3.6.2`

Configuration Tasks (Application Server 6.5)

The TradingXpert installer script performs the following operations:

- sets up a directory structure and copies TradingXpert files into it (see "TradingXpert Directory Structure: Application Server 6.5" on page 26)

- registers TradingXpert with the application server

- makes required modifications to the application server classpath.

The installer script does not, however, configure TradingXpert to inter-operate with ECXpert. Therefore, once TradingXpert software is installed, you have to perform the following configuration tasks:

- edit the TradingXpert configuration file (FXproperties) to specify the TradingXpert installation directory, the location of the ECXpert configuration file (ecx.ini), and the TradingXpert URL prefix (TX)

- copy TradingXpert map files, as needed, to the appropriate ECXpert map directory

- optionally, configure TradingXpert to run on a different host machine from ECXpert

These tasks are described in the sections that follow.

Editing the TradingXpert Configuration File

You are required to edit the TradingXpert configuration file (FXproperties) to specify the TradingXpert installation directory (FX.rootdir), the location of the ECXpert configuration file (FX.ecxini.file), and the TradingXpert URL prefix (FX.basedir).

The configuration file is located in:

TX_HOME/common/ (Application Server 6.5)

TX_HOME/config/ (Application Server 7.0)

The properties you are required to set, and a number of additional TradingXpert properties that you might optionally set, are described in Table 2-2.

Table 2-2   TradingXpert Configuration Properties

Property	Default Value	Description
FX.rootdir	no default	Points to the TradingXpert installation directory (TX_HOME). Note that the path should end with a trailing slash. For example: `/disk1/ias6.5/ias/APPS/FX/`
FX.ecxini.file	no default	TradingXpert needs to access the ECXpert properties file (ecx.ini), normally located in BDGHOME/config.
FX.basedir	TX	The URL prefix you use to access the TradingXpert login screen and other TradingXpert functions.
FX.session.timeout	8 (in minutes)	Sets the time (in minutes) from the last user action to when TradingXpert times out. On timeout, the user is requested to log in again. For production environments, it is recommended that you set the timeout value to 30 minutes.
FX.remoteSubmission	FALSE	Specifies remote submission of documents by TradingXpert to ECXpert. A value of FALSE means TradingXpert and ECXpert run on the same host machine. A value of TRUE means TradingXpert and ECXpert run on different hosts. (See "Configuring TradingXpert to Run on a Different Machine from ECXpert" on page 37.)
FX.remoteECXPathPrefix	no default	Only applies if TradingXpert and ECXpert run on different hosts (FX.remoteSubmission= TRUE). If needed (Solaris environments), this property specifies an ECXpert mount point to be pre-pended to directory paths used in the retrieval of ECXpert documents. (See "Configuring TradingXpert to Run on a Different Machine from ECXpert" on page 37.)

Table 2-2   TradingXpert Configuration Properties *(Continued)*

Property	Default Value	Description
FX.debug	FALSE	Sets the debugging flag. When TRUE , TradingXpert prints a large volume of messages to kjs logs to facilitate debugging. In production environments, the value should be set to FALSE.

Copying TradingXpert Map Files to ECXpert

The TradingXpert installer places default map files in the following directory:

    TX_HOME/maps_etc/maps/solaris

These default map files can be used as is, as source for customizing your TradingXpert installation, or as examples for creating your own map files. Whatever the case, the map files used for TradingXpert processing need to be placed in the following ECXpert directory, where they can be accessed to perform data transformations:

    BDGHOME/maps

If you want to test your TradingXpert installation using the test scenario provided with the product (see Chapter 4, "Testing Your TradingXpert Installation"), then copy the 850html.sun and html810.sun default maps to the BDGHOME/maps directory.

Configuring TradingXpert to Run on a Different Machine from ECXpert

This section provides additional configuration tasks required if TradingXpert is installed on a machine different from ECXpert, as shown in Figure 2-1. The tasks described assume the following scenario:

- "TX Host" is the host for TradingXpert. This includes, also, the Sun ONE Application Server and an Oracle client.

- "ECX Host" is the host for ECXpert and can also host an Oracle client (if Oracle is running on a remote host).

- "Oracle Host" is the host for the Oracle database server. (Oracle might also be running locally on ECX Host.)

Figure 2-1 TradingXpert and ECXpert on Different Machines
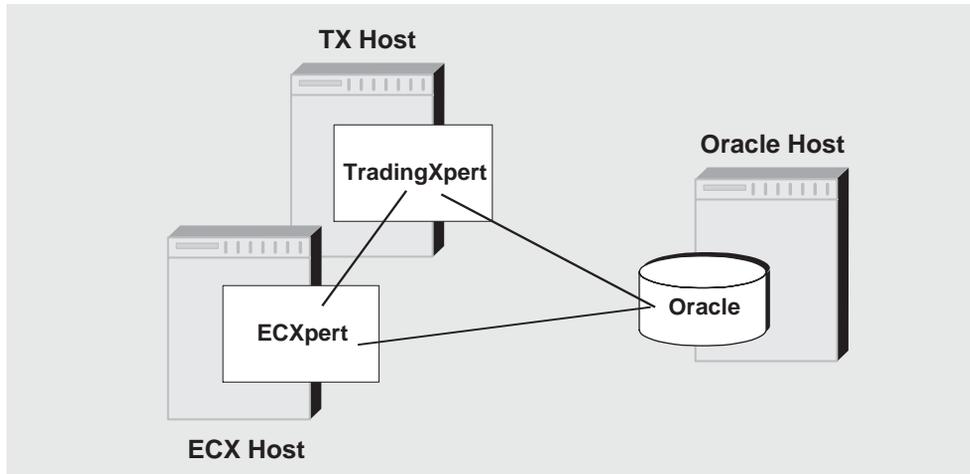
The general procedures required to set up this configuration are detailed below.

➤ **To configure TradingXpert to run on a machine different from ECXpert**

   1. Set up TX Host as if ECXpert were installed locally. This involves providing access to the ECXpert directory structure and configuration file (ecx.ini), and setting a BDGHOME environment variable. See "Setting up TX Host as if ECXpert Were Installed Locally" on page 39.

   2. Set up TX Host to access the Oracle database used by ECXpert (it is assumed that ECX Host is already set up to access the database). See "Setting up TX Host to Access the Oracle Database Used by ECXpert" on page 40.

These procedures apply to an initial installation of TradingXpert on a separate machine, *or* to a migration of TradingXpert away from the machine hosting ECXpert. They allow TradingXpert to submit document files to ECXpert, retrieve documents from ECXpert, and access the partnership and process tracking information stored in the Oracle database.

Setting up TX Host as if ECXpert Were Installed Locally

➤ **To set up TX Host as if ECXpert were installed locally**

1. Mount the ECX Host's ECXpert installed directory structure (the directory referenced by BDGHOME) on TX Host.

2. Set the BDGHOME environment variable on TX Host.

   The BDGHOME environment variable on TX Host should point to the same directory as the BDGHOME environment variable on ECX Host.

3. Give the TradingXpert user privileges to access (read) ECXpert's BDGHOME/data directory.

4. Restart TX Host.

   This is necessary for the changes in environment variable settings to take effect.

5. Edit the ecx.ini file on ECX Host to specify a static TCP/IP port for communication with ECXpert (this is used to submit documents to ECXpert):

   a. Open the ecx.ini file.

      The file is located in the BDGHOME/config directory

   b. Modify the [tcpip-connector] section as follows:

      ```
      port_location = static
      admin_port_type = manual
      admin_port = any unused port
      listener_port_type = manual
      listener_port = any unused port
      ```

   c. Restart ECXpert for these changes to take effect.

6. Modify TradingXpert's FXproperties file on TX Host.

   a. Turn on the FXremoteSubmission property:

      ```
      FX.remoteSubmission: TRUE
      ```

   b. Set the FXremoteECXPathPrefix property to specify the ECXpert mount point in Step 1. This path is to be pre-pended to directory paths specified in the ecx.ini file for the retrieval of ECXpert documents. For example, if the mountpoint is /h/EXC_Host, then TradingXpert will retrieve files from ECXpert at /h/ECX_Host/BDGHOME/data...

   c. Restart TradingXpert on TX Host for property edits to take effect.

Setting up TX Host to Access the Oracle Database Used by ECXpert

➤ **To set up TX Host to access Oracle**

1. Install the Oracle client on TX Host, if not already installed.

2. Give the TradingXpert user privileges to access Oracle client software.

3. Edit the `tnsnames.ora` file to reference the Oracle Server

4. Check that the `ORACLE_HOME` and `ORACLE_SID` variables are properly set on ECX Host.

    These entries are found in the `[ORACLE_ENV]` section of the `ecx.ini` file, locate the `DB_SERVER` parameter.

5. Check the `DB_SERVER` parameter of the `ecx.ini` file.

    In the `[DB_SECTION]` section of the `ecx.ini` file, locate the `DB_SERVER` parameter. If not already included, enter the following lines in the `[DB_SECTION]` section:

    ```
    [DB_SECTION]
    DB_SERVER=Oracle DB alias
    DB_USER=Oracle username
    DB_SERVER=Oracle password
    ```

    where *Oracle DB alias* is the Oracle database alias from the `tnsnames.ora` file in Step 3.

Installing TradingXpert in a Sun ONE Application Server 7.0 Environment

This section, specific to the Sun ONE Application Server 7.0, covers the following topics:

*   Pre-Installation Tasks

*   Installation Steps

*   Configuring a TradingXpert Installation

Pre-Installation Tasks (Application Server 7.0)

You should perform the following tasks before installing TradingXpert in a Sun ONE Application Server 7.0 environment. These tasks (except where noted) should be performed under the same non-root user account: the ECXpert administrator account (for example, ecxadmin).

1. Check that all hardware and software requirements (Table 2-1 on page 31) are met by your Solaris system.

2. Install ECXpert 3.6.2 and check that it is running properly. In particular, make sure that Oracle is up and running and that the BDGHOME environment variable is set on the ECXpert host machine (see "Checking the BDGHOME Environment Variable" on page 33).

   If ECXpert is running on a host machine different from the one on which TradingXpert is to be installed, then you will have to perform additional setup operations for TradingXpert to run in this configuration (see "Configuring TradingXpert to Run on a Different Machine from ECXpert" on page 37).

3. Check that Sun ONE Application Server 7.0—which includes a built-in web server—is installed and properly configured. (If Sun ONE Application Server 7.0 has not previously been installed, you must log in as root to install it.) With the application server running, perform the following steps:

   a. Log in under your TradingXpert user account (for example, ecxadmin).

   b. Create an application server instance that will host TradingXpert (see "Creating an Application Server Instance for TradingXpert," below).

   c. Modify the server.policy file for the application server instance so that the TradingXpert setup script can delete temporary files (see "Modifying the server.policy File" on page 42).

Creating an Application Server Instance for TradingXpert

1. Launch the Sun ONE Application Server's Administration Server.

2. Enter the Administration Console URL:

   http:*AS_admin_host:port*

   where *AS_admin_host* is the server hosting the Application Server's administration server and *port* is the port number of the listener.

3. Log in under the application server administrator account.

   The Administration Console window opens, displaying existing application server instances.

4. Click New.

   The new application server instance dialogue is displayed.

5. Enter the Instance Name.

   This is the name of the application server instance that will host TradingXpert (for example, `tradingx`).

6. Enter the HTTP Port.

   This is the port on which the application server instance (web server instance) will be listening for requests from the TradingXpert browser-based user interface.

7. Enter a user account in the Run As User field.

   Use the account under which TradingXpert will be running (for example, `ecxadmin`).

8. Click OK.

   The Administration Console window will display the new application server instance.

9. Click the link for the newly created application server instance.

   A multi-tabbed dialog is displayed.

10. Click Start to turn on the new server instance.

Modifying the server.policy File

➤ **To modify the server.policy file**

1. Open the server.policy file found in the following directory:

   Root_AS_Install/`domains/domain1/`*appServer_instance*/`config/`

   where *Root_AS_Install* is the root installation directory for the application server and *appServer_instance* is the name of the application server instance to be used by TradingXpert (for example, `tradingx`)—see "Creating an Application Server Instance for TradingXpert" on page 41.

2. Find the following entry:

    ```
    permission java.io.FilePermission "<<ALL FILES>>", "read,write";
    ```

3. Add permission to delete.

    ```
    "read,write,delete"
    ```

4. Save the file.

5. Restart the appliction server instance for the change to take effect.

Installation Procedures (Application Server 7.0)

Installation of TradingXpert requires you to locate the software distribution files in the Sun ONE Integration Server, B2B Edition CD-ROM set and run the TradingXpert setup script.

➤ **To run the TradingXpert setup script**

1. Log in under the same user account (for example, ecxadmin) that was used to install ECXpert and to create the application server instance for TradingXpert (see "Creating an Application Server Instance for TradingXpert" on page 41).

2. Insert the Sun ONE Integration Server B2B Edition 3.6.2 Solaris CD-ROM into your CD-ROM drive.

3. Change directories to the directory on the CD-ROM which contains the setup file:

    ```
    /TradingXpert3.6.2/install_bits/TX_for_AppServer7.0/
    ```

4. Type the following command at the command prompt:

    ```
    setup
    ```

    The installer script requests that you enter the following values:

    ❍   the TradingXpert application directory, TX_HOME (see "TradingXpert Application Directory" on page 29 and Table 3 on page 15)
        Be sure to enter the full path. There is no default value.

    ❍   the value of the ECXpert BDGHOME environment variable (see Table 3 on page 15).
        Be sure to enter the full path. There is no default value.

❍ the domain of the application server instance that will support TradingXpert (see "Creating an Application Server Instance for TradingXpert" on page 41).
Be sure to type in the domain name (for example, domain1). There is no default value.

❍ the application server administrator account and password

❍ the name of the application server instance in which TradingXpert is to run (for example, tradingx)

❍ the application server administrator access port number

The installer uses these values to modify the FXproperties and TX.war files, deploy the TX.war file, update the TradingXpert native library directory path, and, finally, stop and restart the application server instance.

Configuration Tasks (Application Server 7.0)

The TradingXpert installer script performs the following operations:

- places a number of TradingXpert files into a predefined directory structure (see "TradingXpert Application Directory" on page 29).

- deploys the TradingXpert web archive file (TX.war):

    ❍ configures the application server (and included web server) to run TradingXpert

    ❍ places a number of files in the application server directory structure (see "J2EE Module Directory" on page 28).

- modifies the TradingXpert configuration file (FXproperties) to point to the root TradingXpert installation directory and to the ECXpert configuration file

Once TradingXpert software is installed, however, you still have to perform two optional configuration tasks, depending on your use of TradingXpert, for TradingXpert to inter-operate with ECXpert:

- copy TradingXpert map files, as needed, to the appropriate ECXpert map directory (see instructions in "Copying TradingXpert Map Files to ECXpert" on page 37)

- configure TradingXpert to run on a different host machine from ECXpert (see instructions in "Configuring TradingXpert to Run on a Different Machine from ECXpert" on page 37).

Windows Installation

This chapter provides the information required to install and configure TradingXpert software on the Windows platform. Aside from having common hardware and software requirements, installation and configuration of TradingXpert depends upon whether the product is being deployed in a Sun ONE Application Server 6.5 or a Sun ONE Application Server 7.0 environment. Hence, this chapter is broken down into the following sections:

- "Hardware and Software Requirements"

- "Installing TradingXpert in a Sun ONE Application Server 6.5 Environment" on page 46

- "Installing TradingXpert in a Sun ONE Application Server 7.0 Environment" on page 58

Hardware and Software Requirements

The minimum requirements for installing TradingXpert on a Windows platform are indicated in Table 3-1.

Table 3-1   Hardware and Software Requirements for Windows

Component	Requirements
Operating system	Windows NT 4.0 SP6a (Sun ONE Application Server 6.5 only) Windows 2000 (Professional, Server, Advanced Server) SP2
CPU	Intel Pentium 600 MHz (or compatible) workstation
RAM	512 Mbytes
Hard drive space	The installed product requires approximately 200 Mbytes Document storage might require up to 6 Gbytes.

Table 3-1   Hardware and Software Requirements for Windows *(Continued)*

Component	Requirements
Other dependent software	See Table 1-1 on page 20 for the supported versions of the Java Runtime Environment (JRE), Java Software Development Kit (JDK), Oracle, and supported versions of other software products on which TradingXpert depends.

Installing TradingXpert in a Sun ONE Application Server 6.5 Environment

This section, specific to the Sun ONE Application Server 6.5, covers the following topics:

- Pre-Installation Tasks

- Installation Steps

- Configuring a TradingXpert Installation

Pre-Installation Tasks (Application Server 6.5)

You should perform the following tasks before installing TradingXpert in a Sun ONE Application Server 6.5 environment:

1. Check that all hardware and software requirements (Table 3-1 on page 45) are met by your Windows system.

2. Install ECXpert 3.6.2 and check that it is running properly. In particular, make sure that Oracle is up and running and that the BDGHOME environment variable is set on the ECXpert host machine (see "Checking the BDGHOME Environment Variable" on page 47).

If ECXpert is running on a host machine different from the one on which TradingXpert is to be installed, then you will have to perform additional setup operations for TradingXpert to run in this configuration. In particular, ECXpert should be installed in a directory tree on an otherwise unused drive (see "Configuring TradingXpert to Run on a Different Machine from ECXpert" on page 54).

3. Check that Sun ONE Web Server 6.0 is installed and configured properly.

If Sun ONE Web Server 6.0 has not previously been installed, install it and create an instance that will receive requests from TradingXpert's browser-based user interface (see "Creating a Web Server Instance for TradingXpert" on page 48).

4. Check that Sun ONE Application Server 6.5 is installed and configured properly.

If Sun ONE Application Server 6.5 has not previously been installed, install it, and configure it to communicate with the Sun ONE Web Server instance to be used by TradingXpert (see your application server documentation for procedures).

Checking the BDGHOME Environment Variable

The value of the BDGHOME environment variable (see Table 3 on page 15) must be properly set on the ECXpert host computer.

1. From the Windows toolbar, open Settings > Control Panel > System.

The System Properties window opens.

2. Choose the Environment tab.

3. Check for BDGHOME in the System Variables field.

BDGHOME is a *system* variable, not a *user* variable. If set as a user variable Sun ONE Application Server won't be able to read it. The value of BDGHOME should be the full path to your ECXpert installed directory structure (see Table 3 on page 15).

4. If BDGHOME has not been properly set:

    a. Set the value of BDGHOME.

    b. Click OK.

    c. Restart your computer.

Creating a Web Server Instance for TradingXpert

1. Launch the Sun ONE Web Server's Administration Server.

2. Enter the Administration Console URL:

   `http://`*web_server_host*`:`*port*

   where *web_server_host* is the name of your web server's host computer, and *port* is the number of the port used for web server administration.

3. Log in under the web server administrator account.

   The Administration Console window opens up.

4. Click Add Server.

5. Enter the Server Name.

   This is the web server's host computer (*web_server_host*)

6. Enter the Server Port.

   This is the number of the port on which the web server instance will be listening for requests from the TradingXpert browser-based user interface.

7. Enter the Server Identifier.

   Use an instance identifier such as `tradingx`

8. Click OK.

9. Click Configure Your New Server.

10. Turn on the new server instance.

    A success window confirmation appears.

11. Click OK.

Installation Procedures (Application Server 6.5)

Installation of TradingXpert requires you to locate the software distribution files in the Sun ONE Integration Server, B2B Edition CD-ROM set and run the TradingXpert install script.

➤ **To run the TradingXpert installer**

1. Insert the Sun ONE Integration Server B2B Edition 3.6.2 Windows CD-ROM into your CD-ROM drive.

2. Launch a DOS shell:

    a. From the Windows toolbar choose Start > Run.

    b. In the Open field, type `command`.

    c. Click OK.

3. Change directories to the directory on the CD-ROM which contains the `install_all.bat` file:

    `\TradingXpert3.6.2\install_bits\TX_for_AppServer6.5\`

4. Type the following command at the command prompt:

    `install_all.bat` *Root_AS_Install ECX_version*

    where *Root_AS_Install* is the root installation directory for Sun ONE Application Server, and *ECX_version* is the release version of ECXpert. For example:

    `E:\…AppServer6.5\> install_all.bat D:\ias65\ias 3.6.2`

    The TradingXpert installer will display a few cryptic lines of output as it performs the installation.

Configuration Tasks (Application Server 6.5)

The TradingXpert installer performs the following operations:

- sets up a directory structure and copies TradingXpert files into it (see "TradingXpert Directory Structure: Application Server 6.5" on page 26)

- registers TradingXpert with the application server (but does not make required modifications to the application server classpath).

The installer does not configure TradingXpert to inter-operate with ECXpert or the web server. Therefore, once TradingXpert software is installed, you have to manually perform the following configuration tasks:

- edit the TradingXpert configuration file (FXproperties) to specify the TradingXpert installation directory, the location of the ECXpert configuration file (ecx.ini), and the TradingXpert URL prefix (TX)

- modify the application server classpath variable to reference the ecxsdkjni.jar file

- set the TradingXpert web server instance to use the "TX" URL prefix required by TradingXpert

- copy TradingXpert map files, as needed, to the appropriate ECXpert map directory

- optionally, configure TradingXpert to run on a different host machine from ECXpert

These tasks are described in the sections that follow.

Editing the TradingXpert Configuration File

You are required to edit the TradingXpert configuration file (FXproperties)to specify the TradingXpert installation directory (FX.rootdir), the location of the ECXpert configuration file (FX.ecxini.file), and the TradingXpert URL prefix (FX.basedir).

The configuration file is located in:

TX_HOME\common\ (Application Server 6.5)

TX_HOME\config\ (Application Server 7.0)

The properties you are required to set, and a number of additional TradingXpert properties that you might optionally set, are described in Table 3-2.

Table 3-2   TradingXpert Configuration Properties

Property	Default Value	Description
FX.rootdir	no default	Points to the TradingXpert installation directory (TX_HOME). Note that the path should end with a trailing slash. For example: /disk1/ias6.5/ias/APPS/FX/
FX.ecxini.file	no default	TradingXpert needs to access the ECXpert properties file (ecx.ini), normally located in BDGHOME/config.
FX.basedir	TX	The URL prefix you use to access the TradingXpert login screen and other TradingXpert functions.
FX.session.timeout	8 (in minutes)	Sets the time (in minutes) from the last user action to when TradingXpert times out. On timeout, the user is requested to log in again. For production environments, it is recommended that you set the timeout value to 30 minutes.
FX.remoteSubmission	FALSE	Specifies remote submission of documents by TradingXpert to ECXpert. A value of FALSE means TradingXpert and ECXpert run on the same host machine. A value of TRUE means TradingXpert and ECXpert run on different hosts. (See "Configuring TradingXpert to Run on a Different Machine from ECXpert" on page 54.)
FX.remoteECXPathPrefix	no default	Only applies if TradingXpert and ECXpert run on different hosts (FX.remoteSubmission= TRUE). If needed (Solaris environments) this property specifies an ECXpert mountpoint to be pre-pended to directory paths in the retrieval of ECX documents. (See "Configuring TradingXpert to Run on a Different Machine from ECXpert" on page 54.)
FX.debug	FALSE	Sets the debugging flag. When TRUE, TradingXpert prints a large volume of messages to kjs logs to facilitate debugging. In production environments, the value should be set to FALSE.

Modifying the Application Server Classpath Variable

Perform the following steps to modify the Application Server classpath variable to reference the `ecxsdkjni.jar` file.

➤ **To modify the Application Server classpath**

1. Launch the `kregedit` program.

   This program is a Sun ONE utility for modifying Application Server registry entries. To launch it:

   a. Select Start>Run.

   b. Enter `kregedit`.

   c. Click OK.

2. Navigate to `SOFTWARE>Sun ONE>Application Server>6.5>Java>ClassPath`.

3. Double-click the Classpath entry to open the Modify Value dialogue box.

4. Add the following entry to the end of the classpath:

   Root_ASInstall`\ias\classes\java\ecxsdkjni.jar`

   (Be sure to add a semicolon before the entry.)

5. Click OK.

Setting the URL Prefix for TradingXpert

In the URL you use to invoke TradingXpert, "`TX`" is always the prefix. Use the following instructions to set your TradingXpert web server instance to use the TradingXpert "`TX`" URL prefix, and to point the web server instance to the static HTML templates used to implement screens in TradingXpert's browser-based user interface.

➤ **To set up a URL prefix for TradingXpert**

1. Launch the Sun ONE Web Server's Administration Server.

2. Enter the Administration Console URL in your browser.

   `http://`*web_server_host*`:`*port*`/https-admserv/bin/index`

   where *web_server_host* is the name of your web server's host computer, and *port* is the number of the port on which your server listens.

3. Select the server instance you set up for TradingXpert.

   See "Creating a Web Server Instance for TradingXpert", Step 7 on page 48.

4. Click the Manage button.

5. Choose the Virtual Server Class tab.

6. Select the class "default class."

7. Click the Manage button.

8. Choose the Content Management tab

9. Click the Additional Documents Directory button.

10. Add the URL prefix "TX".

11. In the Map to Directory field insert the path to the TradingXpert static HTML templates:

    TX_HOME/web

12. Click OK.

13. Click Apply Changes.

    An acknowledgement should appear.

Copying TradingXpert Map Files to ECXpert

The TradingXpert installer places default map files in the following directory:

    TX_HOME/maps_etc/maps/nt

These default map files can be used as is, as source for customizing your TradingXpert installation, or as examples for creating your own map files. Whatever the case, the map files used for TradingXpert processing need to be placed in the following ECXpert directory, where they can be accessed to perform data transformations:

    BDGHOME/maps

If you want to test your TradingXpert installation using the test scenario provided with the product (see Chapter 4, "Testing Your TradingXpert Installation"), then copy the 850html.mmc and html810.mmc default maps to the BDGHOME/maps directory.

Configuring TradingXpert to Run on a Different Machine from ECXpert

This section provides additional configuration tasks required if TradingXpert is installed on a machine different from ECXpert, as shown in Figure 3-1. The tasks described assume the following scenario:

- "TX Host" is the host for TradingXpert. This includes, also, the Sun ONE Application Server and an Oracle client.

- "ECX Host" is the host for ECXpert and can also host an Oracle client (if Oracle is running on a remote host).

- "Oracle Host" is the host for the Oracle database server. (Oracle might also be running locally on ECX Host.)

Figure 3-1   TradingXpert and ECXpert on Different Machines
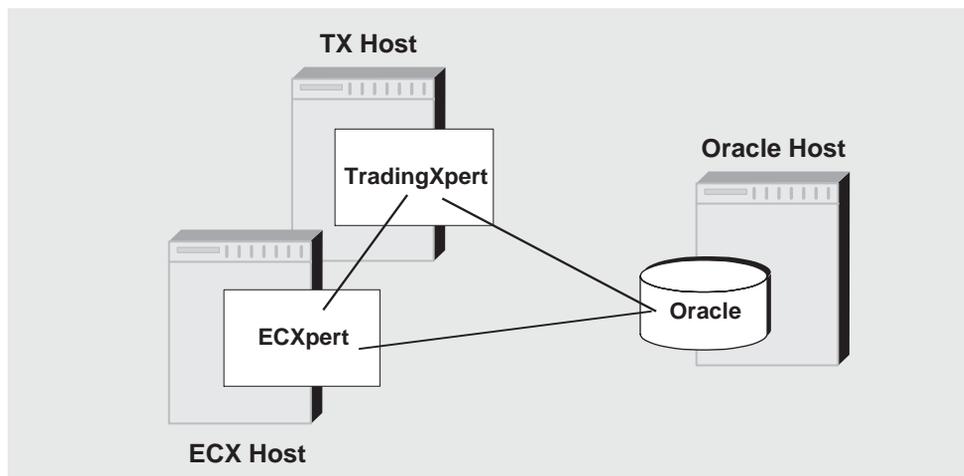
The general procedures required to set up this configuration are detailed below.

➤ **To configure TradingXpert to run on a machine different from ECXpert**

  1. Install ECXpert on ECX Host on a drive that is not used for any other purpose (for example, `Y:\`) and share that drive.

  2. Mount the ECX Host's shared drive on TX Host by mapping it to an unused drive letter (for example, drive `Y:\`).

  3. Set up TX Host as if ECXpert were installed locally. This involves setting up a `BDGHOME` environment variable and providing a local ECXpert configuration file (`ecx.ini`). See "Setting up TX Host as if ECXpert Were Installed Locally."

4. Set up TX Host to access the Oracle database used by ECXpert (it is assumed that ECX Host is already set up to access the database). See .

These procedures apply to an initial installation of TradingXpert on a separate machine, *or* to a migration of TradingXpert away from the machine hosting ECXpert.

Setting up TX Host as if ECXpert Were Installed Locally

➤ **To set up TX Host as if ECXpert were installed locally**

1. Set the `BDGHOME` environment variable on TX Host.

   a. From the Windows toolbar, open Settings > Control Panel > System.

   The System Properties window opens.

   b. Choose the Environment tab.

   c. In the Variable box near the bottom, enter `BDGHOME`.

   d. In the Value box, enter the value that the `BDGHOME` environment variable has on ECX Host.

   For example: `y:\my_bdghome_path`

   e. Click the Set button.

   f. Restart TX Host.

   This is necessary for the changes in environment variable settings to take effect. (You can wait until you complete to restart the computer.)

(If the Sun ONE Application Server is started using the System Account, you will have to add `BDGHOME` to the System Variables section rather than to the User Variables section.)

2. Create a `config` directory on TX Host.

    a. Open a file system window or a Command Prompt window.

    b. Create a *config* directory immediately below the directory specified for `BDGHOME` in Step 1.

       For example, if you set `BDGHOME` to `y:\my_bdghome_path`, you would now create `y:\my_bdghome_path\config`.

3. Edit the `ecx.ini` file on ECX Host to specify a static TCP/IP port for communication with ECXpert (this is used to submit documents to ECXpert):

    a. Open the `ecx.ini` file.

       The file is located in the `BDGHOME\config` directory.

    b. Modify the `[tcpip-connector]` section as follows:

```
port_location = static
admin_port_type = manual
admin_port = any unused port
listener_port_type = manual
listener_port = any unused port
```

    c. Restart ECXpert for these changes to take effect.

4. Copy the edited `ecx.ini` file from ECX Host to TX Host.

   Place the file in the `config` directory created in Step 2.

5. Modify the `ecx.ini` file on TX Host.

   Replace the drive letter for all directory paths with the drive letter used to map TX_Host to the ECX_Host shared drive (for example, drive `Y:\`), as shown in the following example:

```
[gateway]
...
repository = y:\NS-apps\ECXpert\data\bundle
...
[tcpip-connector]
...
port_location = static
...
admin_port = <any unused port>
admin_port_type = manual
listener_port = <any unused port>
listener_port_type = manual
...
repository = y:\NS-apps\ECXpert\data\work\trk
```

```
remote_dir = y:\NS-apps\ECXpert\data\work\remote
...
[translate]
...
workDir=y:\NS-apps\ECXpert\data\work
...
inputDir=y:\NS-apps\ECXpert\data\input
outputDir=y:\NS-apps\ECXpert\data\output
mapsDir=y:\NS-apps\ECXpert\maps
...
[FAGen]
...
outputDir=y:\NS-apps\ECXpert\data\output
```

6. Modify the `FXproperties` file on TX Host.

   a. Turn on the remote submission property:

      `FX.remoteSubmission: TRUE`

   b. Make sure the ECX path prefix property value is empty

      `FX.remoteECXPathPrefix:` (nothing following the colon).

   c. Restart TradingXpert on TX Host for property edits to take effect.

Setting up TX Host to Access the Oracle Database Used by ECXpert

➤ **To set up TX Host to access Oracle**

   1. Install the Oracle client on TX Host, if not already installed.

   2. Edit the `tnsnames.ora` file to reference the Oracle Server

   3. Set the `ORACLE_HOME` and `ORACLE_SID` variables on TX Host.

      a. From the Control Panel, double-click the System icon

      b. Choose the Environment tab.

      c. Click anywhere in the User Variables list.

         This is necessary to activate the User Variables list for the next several steps. It does not matter which variable your click selects.

      d. In the Variable box near the bottom, enter `ORACLE_HOME`.

     e. In the Value box, enter the same value that the `ORACLE_HOME` environment variable has on ECX Host.

     For example: `d:\orant`

     Avoid using spaces in directory and file names (for example, use "ProgramFiles" instead of "Program Files.")

     f. Click the Set button.

     g. Repeat Step c through Step f for the `ORACLE_SID` environment variable.

     h. Click OK to close the System Properties dialog.

     i. Restart TX Host.

     This is necessary for the changes in environment variable settings to take effect.

4. Check the `DB_SERVER` parameter of the ecx.ini file on TX Host.

In the `[DB_SECTION]` section of the `ecx.ini` file you copied to TX Host, locate the `DB_SERVER` parameter. Enter a line in the `[DB_SECTION]` section as follows:

```
[DB_SECTION]
DB_SERVER=Oracle DB alias
```

where *Oracle DB alias* is the Oracle database alias from the `tnsnames.ora` file in Step 2.

Installing TradingXpert in a Sun ONE Application Server 7.0 Environment

This section, specific to the Sun ONE Application Server 7.0, covers the following topics:

- Pre-Installation Tasks
- Installation Steps
- Configuring a TradingXpert Installation

Pre-Installation Tasks (Application Server 7.0)

You should perform the following tasks before installing TradingXpert in a Sun ONE Application Server 7.0 environment:

1. Check that all hardware and software requirements (Table 3-1 on page 45) are met by your Windows system.

2. Install ECXpert 3.6.2 and check that it is running properly. In particular, make sure that Oracle is up and running and that the BDGHOME environment variable is set on the ECXpert host machine (see "Checking the BDGHOME Environment Variable" on page 47).

   If ECXpert is running on a host machine different from the one on which TradingXpert is to be installed, then you will have to perform additional setup operations for TradingXpert to run in this configuration. In particular, ECXpert should be installed in a directory tree on an otherwise unused drive (see "Configuring TradingXpert to Run on a Different Machine from ECXpert" on page 54).

3. Check that Sun ONE Application Server 7.0—which includes a built-in web server—is installed and running, and create an application server instance for TradingXpert (see "Creating an Application Server Instance for TradingXpert," below).

4. Modify the server.policy file for the application instance so that TradingXpert setup script can delete temporary files (see "Modifying the server.policy File" on page 60).

Creating an Application Server Instance for TradingXpert

1. Launch the Sun ONE Application Server's Administration Server.

2. Enter the Administration Console URL:

   http://*AS_admin_host:port*

   where *AS_admin_host* is the server hosting the Application Server's administration server and *port* is the port number of the listener.

3. Log in under the application server administrator account.

   The Administration Console window opens, displaying existing application server instances.

4. Click New.

   The new application server instance dialogue is displayed.

5. Enter the Instance Name.

This is the name by which TradingXpert will be associated with the application server instance (for example, `tradingx`).

6. Enter the HTTP Port.

This is the port on which the application server instance (web server instance) will be listening for requests from the TradingXpert browser-based user interface.

7. Enter a user account in the Run as user field.

Use the account under which TradingXpert will be running (for example, `ecxadmin`).

8. Click OK.

The Administration Console window will display the new application server instance.

9. Click the link for the newly created application server instance.

A multi-tabbed dialog is displayed.

10. Click Start to turn on the new server instance.

Modifying the server.policy File

➤ **To modify the server.policy file**

1. Open the server.policy file found in the following directory:

Root_AS_Install\domains\domain1*appServer_instance*\config\

where *Root_AS_Install* is the root installation directory for the application server and *appServer_instance* is the name of the application server instance to be used by TradingXpert (for example, `tradingx`)—see "Creating an Application Server Instance for TradingXpert" on page 59.

2. Find the following entry:

`permission java.io.FilePermission "<<ALL FILES>>", "read,write";`

3. Add permission to delete.

`"read,write,delete"`

4. Save the file.

5. Restart the appliction server instance for the change to take effect.

Installation Procedures (Application Server 7.0)

Installation of TradingXpert requires you to locate the software distribution files in the Sun ONE Integration Server, B2B Edition CD-ROM set and then perform the following procecures:

- run the TradingXpert setup script

- deploy the TradingXpert Web Archive file (TX.war).

➤ **To run the TradingXpert setup script**

1. Insert the Sun ONE Integration Server B2B Edition 3.6.2 Windows CD-ROM into your CD-ROM drive.

2. Launch a DOS shell:

   a. From the Windows toolbar choose Start > Run.

   b. In the Open field, type command.

   c. Click OK.

3. Change directories to the directory on the CD-ROM which contains the setup.bat file:

   \TradingXpert3.6.2\install_bits\TX_for_AppServer7.0\

4. Create a TX_HOME directory.

   This directory can be wherever you wish (see Table 3 on page 15).

5. Type the following command at the command prompt:

   setup.bat *Root_AS_Install* TX_HOME BDGHOME

   where *Root_AS_Install* is the root installation directory for Sun ONE Application Server, TX_HOME is the root TradingXpert installation directory, and BDGHOME is the location of the ECXpert installed software. For example:

   ```
   E:\…AppServer7.0\> setup.bat D:\ias7 D:\myTX
                       D:ECX_root\NS-apps\ECXpert
   ```

Deploying the TradingXpert Archive (TX.war)

➤ **To deploy the `TX.war` file**

1. Point your browser at the Sun ONE Application Server 7.0 administration interface:

   http:*AS_admin_host:port*

   where *AS_admin_host* is the server hosting the Application Server's administration server and *port* is the port number of the listener.

2. Use the deployment tool to deploy `TX.war`:

   a. Open the tree view on the left side to App Server Instances> *appServer_instance*>Applications>Web Apps

   where *appServer_instance* is the name of the application server instance hosting TradingXpert (for example, `tradingx`).

   b. Click Web Apps

   A deployment management dialogue is displayed

   c. Click the Deploy button.

   An Upload WAR file dialogue is displayed.

   d. Browse to the location of the `TX.war` file (`TX_HOME`) and click OK.

   A dialogue specifiying deployment parameters is displayed.

   e. Click OK.

   the dialogue displayed in Step b is displayed showing the deployed `TX.war` web application.

3. Update the TradingXpert native library directory path:

   a. Open the tree view on the left side to the application server instance hosting TradingXpert and select the application server instance hosting TradingXpert (for example, `tradingx`).

   b. Choose the JVM Settings tab.

   c. Click on the Path Settings link.

   d. Enter the following value in the Native Library Path Prefix field:

      `TX_HOME\lib`

   where you enter the full path for `TX_HOME`.

    e. Click Save.

4. Stop and then re-start the application server instance.

    a. Open the tree view on the left side to the application server instance hosting TradingXpert and select the application server instance hosting TradingXpert (for example, `tradingx`).

       A warning is displayed indicating that you have to apply changes.

    b. Click Apply Changes.

       A warning is displayed indicating that you have to restart the application server instance.

    c. Click Stop.

    d. Click Start.

Configuration Tasks (Application Server 7.0)

The TradingXpert installer script performs the following operations:

- places a number of TradingXpert files into a predefined directory structure (see "TradingXpert Application Directory" on page 29)

- modifies the TradingXpert configuration file (`FXproperties`) to point to the root TradingXpert installation directory and to the ECXpert configuration file

Deploying the `TX.war` file places a number of TradingXpert files in the application server directory structure (see "J2EE Module Directory" on page 28) and configures the application server to run TradingXpert.

Once these TradingXpert installation operations are completed, however, you still have to perform two optional configuration tasks, depending on your use of TradingXpert:

- copy TradingXpert map files, as needed, to the appropriate ECXpert map directory (see instructions in "Copying TradingXpert Map Files to ECXpert" on page 53)

- configure TradingXpert to run on a different host machine from ECXpert (see instructions in "Configuring TradingXpert to Run on a Different Machine from ECXpert" on page 54)

Testing Your TradingXpert Installation

This chapter explains how to test your TradingXpert installation using an example document exchange scenario. In this test scenario, a browser-based ECXpert trading partner (*webuser1*) receives a purchase order from an EDI-based trading partner (*TXhost*), and turns that purchase order around to submit an invoice, as well as a file attachment, back to *TXhost*.

To carry out the test scenario, you must first set up the required ECXpert service lists and partnerships between *webuser1* and *TXhost*. Once this is done, you can run through the test scenario: *TXhost* submits a purchase order (EDI doc type = 850) to ECXpert, and *webuser1* uses TradingXpert to retrieve that document and send back an invoice (EDI doc type = 810), as well as an attachment, to *TXhost*.

This chapter covers two topics:

- "Setting Up ECXpert for the Test Scenario"

- "Testing TradingXpert with the Test Scenario" on page 85

Setting Up ECXpert for the Test Scenario

In order to conduct the test scenario, ECXpert must first be set up with the memberships, partnerships, and service lists required to perform the example document exchange. You can do the set up in either of two ways:

- using the ECXpert user interface to manually perform the setup—this helps you understand how to set up ECXpert for browser-based trading partners

- importing setup data provided in the TradingXpert software distribution—this might save you time.

The sections that follow describe these two approaches.

Either way, the test scenario assumes that *TXhost* receives documents over FTP protocols, and you are therefore required to provide the TCP configuration information indicated in the following worksheet:

TCP Configuration Worksheet

FTP Configuration Parameter	Default string in setup data	Your Value
Host_name:port	`ftphost`	
User name	`ftpusername`	
Password	`ftpuserpwd`	
Outbound directory	`outputdir`	

NOTE	Be sure to copy the required map files to `BDGHOME/maps`. See "Copying TradingXpert Map Files to ECXpert" on page 37 for the Solaris platform and "Copying TradingXpert Map Files to ECXpert" on page 53 for the Windows platform.

Setting up ECXpert Manually

To set up the necessary memberships, service lists, and partnerships for the test scenario manually, rather than import them (see "Importing/Deleting Setup Data" on page 82), you perform the following steps:

➤ **To set up ECXpert manually**

1. Set up memberships for *TXhost* and *webuser1*.

   a. *TXhost* with EDI trading address of `ZZ:TXhost`.

   b. *webuser1* with EDI trading address of `ZZ:webuser1`.

2. Set up a service list and partnership for the following exchanges:

   Exchange A: *TXhost* sends purchase order to *webuser1*

   Exchange B: *webuser1* sends an invoice back to *TXhost*

   Exchange C: *webuser1* sends a file attachment back to *TXhost*

The procedures for Step 2 are covered in detail in the following sections.

Exchange A: *TXhost* Sends Purchase Orders to *webuser1*

This section explains how to set up the service list and partnership needed for *TXhost* to send purchase orders to *webuser1*.

Service List Setup A

This service list does not include the Gateway service: after a purchase order (ANSI X.12 850) is parsed and translated to TradingXpert format, it is stored by ECXpert until being retrieved by TradingXpert. If Gateway is in this service list, ECXpert attempts to send purchase orders directly to the trading partner.

Figure 4-1 and the accompanying Table 4-1 show how to set up a service list for this exchange.

Figure 4-1   Service List Screen for *TXhost* Sending Purchase Order to *webuser1*
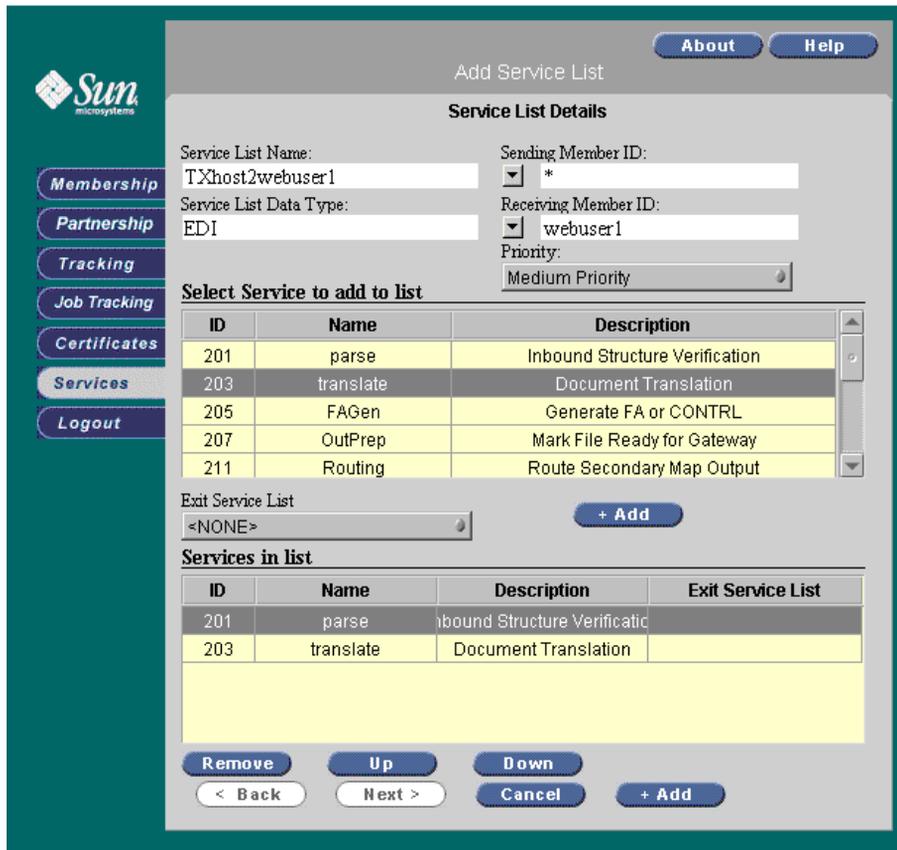
Table 4-1   Service List details for *TXhost* Sending Purchase Order to *webuser1*

Field	Value	Explanation
Service List Details		
Service List Data Type	EDI	Indicates the type of document being serviced
Sending Member ID	*	Applies to any sending member
Receiving Member ID	webuser1	Applies to browser-based ECXpert partner
Select Service to add to List		

Table 4-1 Service List details for *TXhost* Sending Purchase Order to *webuser1 (Continued)*

Field	Value	Explanation
	Parse	Breaks incoming EDI into its constituent parts.
	Translate	Converts documents from one format to another.

Partnership Setup A

The partnership setup includes a number of screens corresponding to the different tabs required to configure the partnership.

Partnership Info   Figure 4-2 and the accompanying Table 4-2 show how to set up the Partnership Info tab for this exchange.

Figure 4-2   Partnership Info for *TXhost* Sending Purchase Order to *webuser1*
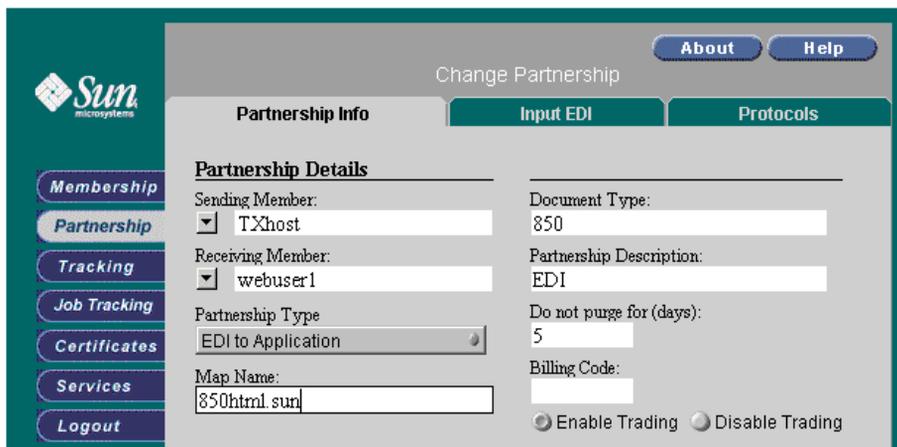
Table 4-2   Partnership Information for *TXhost* Sending Purchase Order to *webuser1*

Field	Value	Explanation
Partnership Details		
Sending Member	TXhost	EDI-enabled ECXpert partner sending the purchase order

Table 4-2   Partnership Information for *TXhost* Sending Purchase Order to *webuser1*

Field	Value	Explanation
Receiving Member	`webuser1`	Browser-based ECXpert partner receiving the purchase order by way of TradingXpert
Document Type	`850`	ANSI X.12 doc type for purchase order
Partnership Type	`EDI to Application`	The document will be picked up by the TradingXpert application
Map Name	`850html.sun` (Solaris) or `850html.mmc` (Windows)	The map file used to convert inbound 850 documents to TradingXpert format (EDI to Application)
Incoming SMTP		
[Parameters]	Default	Not needed for this document exchange.

Input EDI   Figure 4-3 and the accompanying Table 4-3 show how to set up the Input EDI tab for this exchange.

Figure 4-3   Input EDI for *TXhost* Sending Purchase Order to *webuser1*
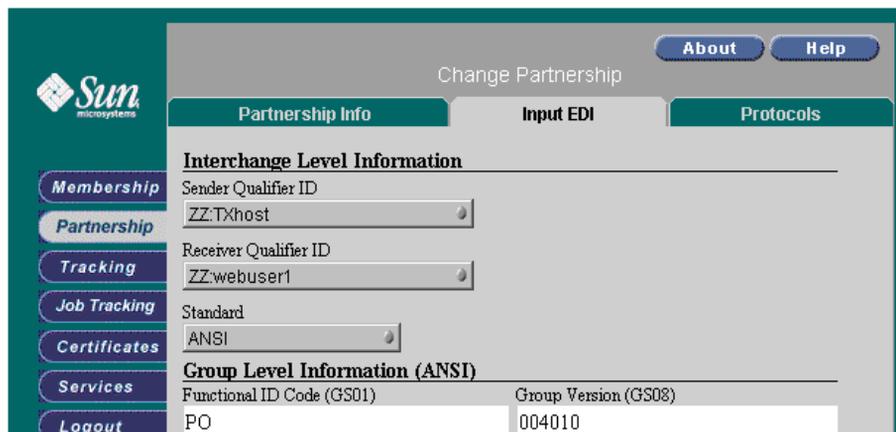
Table 4-3   Input EDI Information for *TXhost* Sending Purchase Order to *webuser1*

Field	Value	Explanation
Interchange Level Information		
Sender Qualifier ID	`ZZ:TXhost`	EDI trading address
Receiver Qualifier ID	`ZZ:webuser1`	EDI trading address
Standard	`ANSI`	Using ANSI X.12 doc type
Group Level Information		
Functional ID Code	`PO`	Corresponds to purchase order
Group Version	`004010`	
Functional Acknowledgments		
[Parameters]	Default	Not needed.

Protocols   Figure 4-4 and the accompanying Table 4-4 show how to set up the Protocols tab for this exchange.

Figure 4-4   Protocols for *TXhost* Sending Purchase Order to *webuser1*
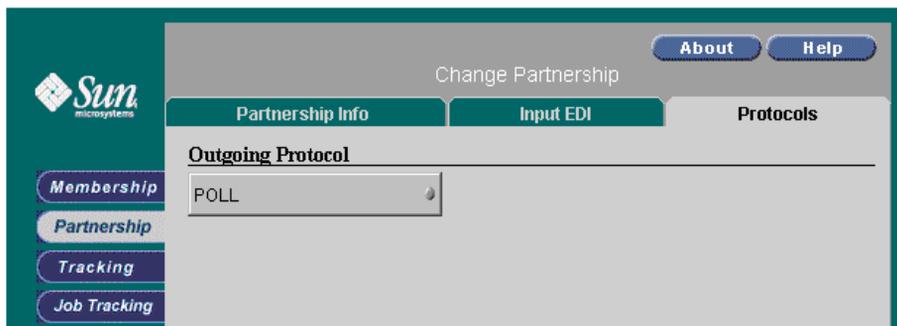
Table 4-4   Protocols for *TXhost* Sending Purchase Order to *webuser1*

Field	Value	Explanation
Outgoing Protocol		
Drop-down protocol list	`POLL`	TradingXpert will retrieve the document, as opposed to its being sent to the Gateway

Exchange B: *webuser1* Sends Invoices to *TXhost*

This section explains how to set up the service list and partnership needed for *webuser1* to send invoices to *TXhost*.

Service List Setup B

Figure 4-5 and the accompanying Table 4-5 show how to set up a service list for this exchange.

Figure 4-5   Service List for *webuser1* Sending Invoices to *TXhost*
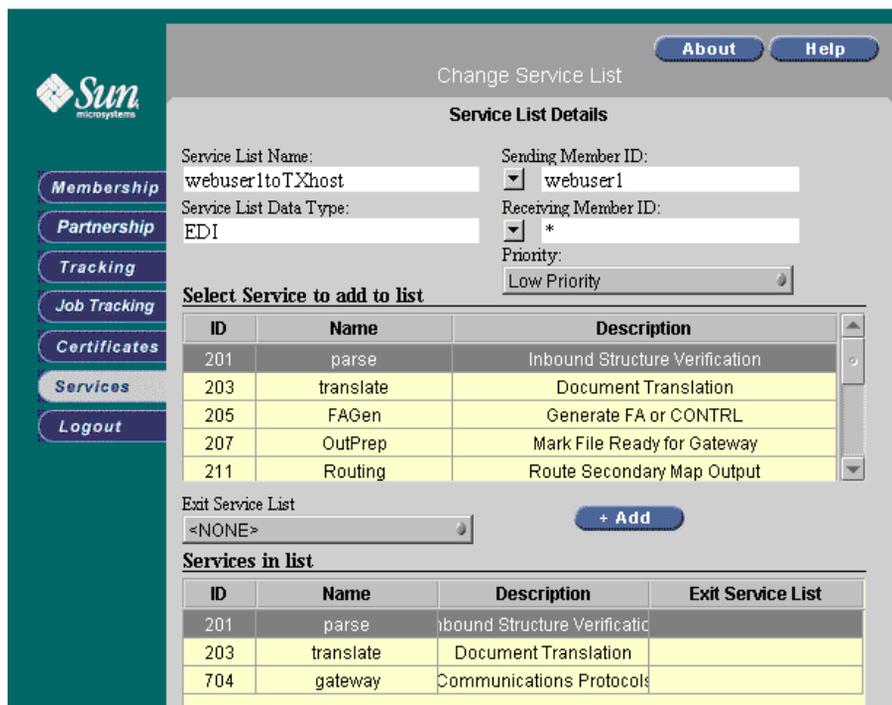
Table 4-5   Service List details for *webuser1* Sending Invoices to *TXhost*

Field	Value	Explanation
Service List Details		
Service List Data Type	EDI	Indicates the type of document being serviced
Sending Member ID	webuser1	Applies to browser-based ECXpert partner

Table 4-5 Service List details for *webuser1* Sending Invoices to *TXhost* *(Continued)*

Field	Value	Explanation
Receiving Member ID	*	Applies to any receiving member
Select Service to add to List		
	Parse	Breaks incoming document into its constituent parts.
	Translate	Converts documents from one format to another
	Gateway	Uses Gateway to send document to receiving member (*TXhost)*

Partnership Setup B

The partnership setup includes a number of screens corresponding to the different tabs required to configure the partnership.

Partnership Info and the accompanying show how to set up the Partnership Info tab for this exchange.

Figure 4-6 Partnership Info for *webuser1* Sending Invoices to *TXhost*

Table 4-6   Partnership Information for *webuser1* Sending Invoices to *TXhost*

Field	Value	Explanation
Partnership Details		
Sending Member	webuser1	Browser-based ECXpert partner sending the invoice by way of TradingXpert
Receiving Member	TXhost	EDI-enabled ECXpert partner receiving the invoice
Document Type	810	ANSI X.12 doc type for invoice
Partnership Type	Application to EDI	The document will be sent by the TradingXpert application to ECXpert
Map Name	html810.sun (Solaris) or html810.mmc (Windows)	The map file used to convert TradingXpert format to outbound 810 documents (Application to EDI)
Incoming SMTP		
[Parameters]	Default	Not needed for this document exchange.

Input HREC   Figure 4-7 and the accompanying Table 4-7 show how to set up the Input HEC tab for this exchange.

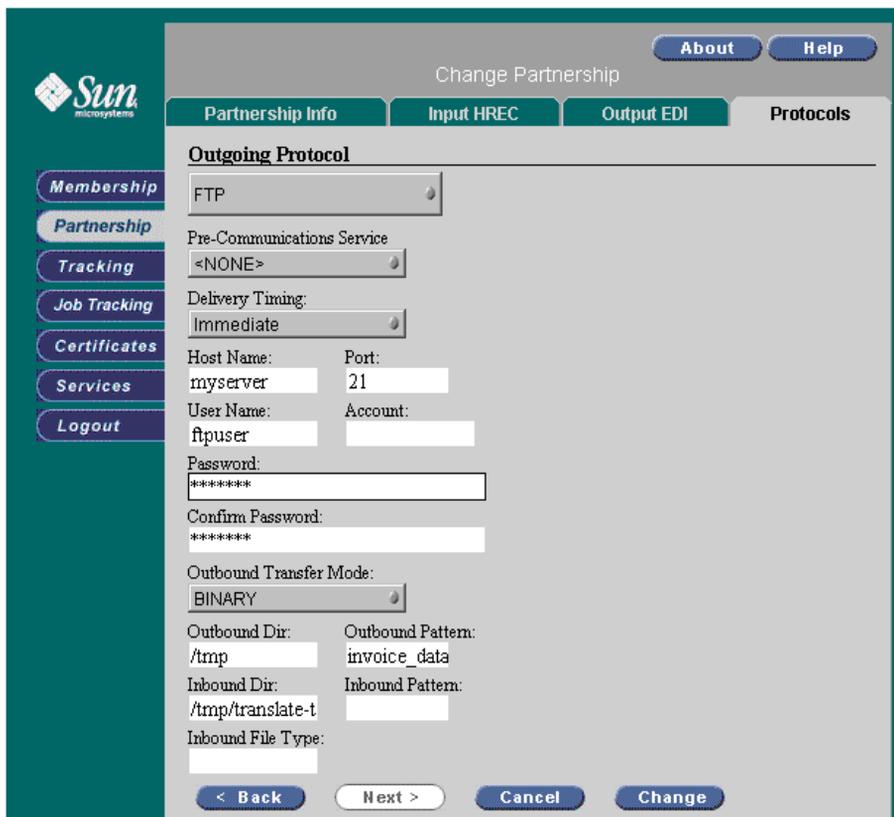**Figure 4-7**   Input HREC for *webuser1* Sending Invoices to *TXhost*
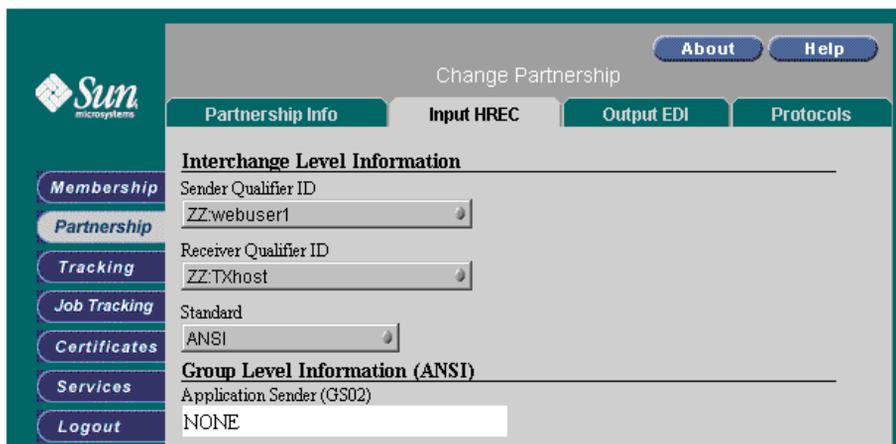
Table 4-7   Input HREC for *webuser1* Sending Invoices to *TXhost*

Field	Value	Explanation
Interchange Level Information		
Sender Qualifier ID	`ZZ:webuser1`	EDI trading address
Receiver Qualifier ID	`ZZ:TXhost`	EDI trading address
Standard	`ANSI`	Using ANSI X.12 doc type
Group Level Information		
Application Sender	`NONE`	
Application Receiver	`NONE`	
Functional ID Code	`IN`	Corresponds to invoice
Group Version	`004010`	

Output EDI   Figure 4-8 and the accompanying Table 4-8 show how to set up the Output EDI tab for this exchange.

Figure 4-8   Output EDI for *webuser1* Sending Invoices to *TXhost*

Table 4-8   Output EDI for *webuser1* Sending Invoices to *TXhost*

Field	Value	Explanation
Enveloping Options		
EDI Envelope	ECXpert generates (or overrides) entire envelope	
Standard	ANSI	
[Remaining parameters]	Default	Not needed for this document exchange.

Protocols   Figure 4-9 and the accompanying Table 4-9 show how to set up the Protocols tab for this exchange.

Figure 4-9   Protocols for *webuser1* Sending Invoices to *TXhost*

Table 4-9 Protocols for *webuser1* Sending Invoices to *TXhost*

Field	Value	Explanation
Outgoing Protocol		
Pull-down protocol list	`FTP`	
Precommunications Service	`<NONE>`	
Delivery Timing	`Immediate`	
Host Name	*myserver*	The name of the machine on which the invoice will be deposited
Port	`21`	The ftp port of the machine on which the invoice will be deposited, typically 21
Username	*ftpuser*	The username you will use to log on to the machine on which the invoice will be deposited
Password	******	The password for the user you entered in the Username field
Confirm Password	******	The password for the user you entered in the Username field, entered a second time for confirmation
Outbound Transfer Mode	`Binary`	
Outbound Dir	`/tmp` (Solaris) `D:\temp` (Windows)	The directory where the file will be deposited
Outbound Pattern	`invoice_data`	
[Remaining parameters]	Default	Not needed for this document exchange.

NOTE   You should also go to the ECXpert Server Administration interface to check that the ECXpert FTP server is on. For instructions, see your *ECXpert Administrator's Guide*, Chapter 3.

Exchange C: *webuser1* Sends File Attachment to *TXhost*

This section explains how to set up the service list and partnership needed for *webuser1* to send file attachments to *TXhost*.

Service List Setup C

Figure 4-10 and the accompanying Table 4-10 show how to set up a service list for this exchange.

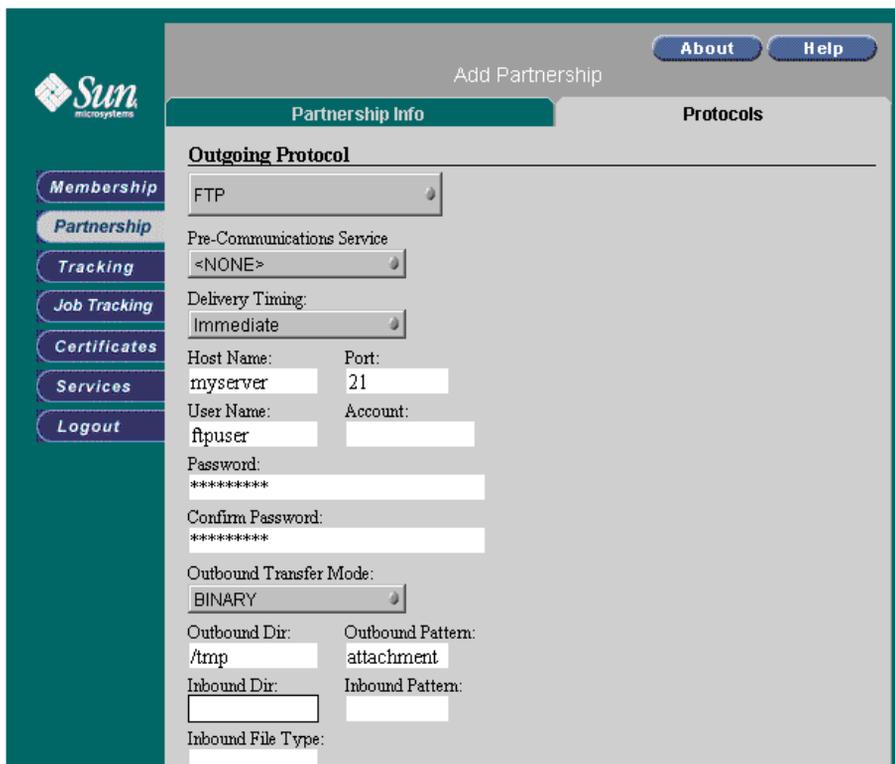**Figure 4-10** Service List for *webuser1* Sending Attachments to *TXhost*
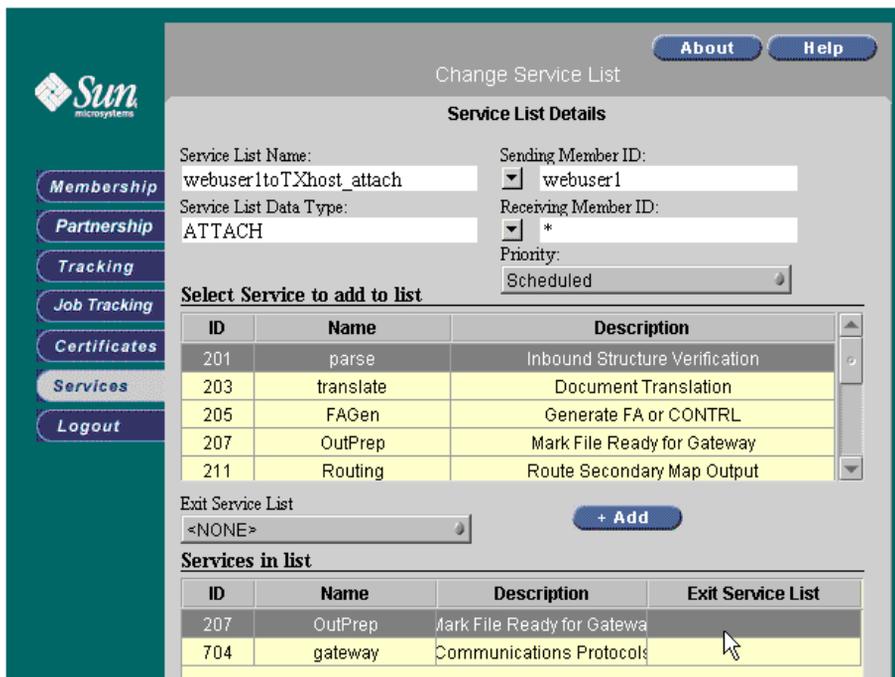
Table 4-10 Service List details for *webuser1* Sending Attachments to *TXhost*

Field	Value	Explanation
Service List Details		
Service List Data Type	ATTACH	Indicates the type of document being serviced
Sending Member ID	webuser1	Applies to browser-based ECXpert partner
Receiving Member ID	*	Applies to any receiving partner

Table 4-10   Service List details for *webuser1* Sending Attachments to *TXhost (Continued)*

Field	Value	Explanation
Select Service to add to List		
	`OutPrep`	Marks files that do not need processing as ready for the Gateway service.
	`Gateway`	Uses Gateway to send document to receiving member (*TXhost)*

Partnership Setup C

The partnership setup includes a number of screens corresponding to the different tabs required to configure the partnership.

Partnership Info   Figure 4-11 and the accompanying Table 4-11 show how to set up the Partnership Info tab for this exchange.

Figure 4-11   Partnership Info for *webuser1* Sending Attachments to *TXhost*

Table 4-11   Partnership Information for *webuser1* Sending Attachments to *TXhost*

Field	Value	Explanation
Partnership Details		
Sending Member	`webuser1`	Browser-based ECXpert partner sending the attachment by way of TradingXpert

Table 4-11   Partnership Information for *webuser1* Sending Attachments to *TXhost*

Field	Value	Explanation
Receiving Member	TXhost	EDI-enabled ECXpert partner receiving the attachment
Document Type	ATTACH	ANSI X.12 doc type for invoice
Partnership Type	Application to Application	Neither partner is EDI-enabled.
Map Name		No map file is needed.
Incoming SMTP		
[Parameters]	Default	Not needed for this document exchange.

Protocols   Figure 4-12 and the accompanying Table 4-12 show how to set up the Protocols tab for this exchange.

Figure 4-12   Protocols for *webuser1* Sending Attachments to *TXhost*

Table 4-12   Protocols for *webuser1* Sending Attachments to *TXhost*

Field	Value	Explanation
Outgoing Protocol		
Pull-down protocol list	FTP	
Precommunications Service	\<NONE\>	
Delivery Timing	Immediate	
Host Name	*myserver*	The name of the machine on which the invoice will be deposited
Port	21	The ftp port of the machine on which the invoice will be deposited, typically 21
Username	*ftpuser*	The username you will use to log on to the machine on which the invoice will be deposited
Password	******	The password for the user you entered in the Username field
Confirm Password	******	The password for the user you entered in the Username field, entered a second time for confirmation
Outbound Transfer Mode	Binary	
Outbound Dir	/tmp	The directory where the file will be deposited
Outbound Pattern	attachment	
[Remaining parameters]	Default	Not needed for this document exchange.

NOTE	You should also go to the ECXpert Server Administration interface to check that the ECXpert FTP server is on. For instructions, see your *ECXpert Administrator's Guide*, Chapter 3.

Importing/Deleting Setup Data

Rather than manually setting up ECXpert to support the TradingXpert test scenario, as detailed in "Setting up ECXpert Manually" on page 67, you can import the memberships, service lists, and partnerships for the test scenario using the import files provided on your installation disk.

NOTE	The import files provided on your installation disk are intended only to provide example data. The import files should not be modified except as instructed in the following procedure. Also, because of an error in the import file, you must correct the imported data, as described in the note appended to Step 7 on page 84.

Importing Setup Data

You import data in the `tx-mem.imp` file into the ECXpert Oracle database using the ECXpert import utility.

➤ **To import Test Scenario Setup Data**

1. Log in to the TradingXpert machine as the same user under which you installed TradingXpert.

2. Change to the `maps_etc/import` directory in the TradingXpert installed directory structure (see "Installed Directory Structure" on page 25).

   `cd TX_HOME/maps_etc/import`

3. Make backup copies of the `tx-mem.imp` and `del-tx-mem.imp` files.

4. Edit the `tx-mem.imp` and `del-tx-mem.imp` files.

   Using a text editor, do a global search and replace of the strings "`ftphost`," "`ftpusername`," "`ftpuserpwd`," and "`outputdir`" with the appropriate values from the table "TCP Configuration Worksheet" on page 66.

5. Make sure BDGHOME is set to the location of the ECXpert installation (see Table 3 on page 15) so that the application server will use the same ecx.ini file that ECXpert uses.

On Solaris:

setenv BDGHOME /*disk1*/*Root_ECX_Install*/NS-apps/ECXpert

where *Root_ECX_Install* is the root installation directory of ECXpert software.

On Windows:

In the Control Panel of the machine on which ECXpert is installed, double-click the System icon, then click the Environment tab. Make sure the BDGHOME variable has the value:

Root_ECX_Install\NS-apps\ECXpert

where *Root_ECX_Install* is the root installation directory of ECXpert software.

6. Make sure the application server can reference the BGDHOME/lib directory.

On Solaris:

If it is not, use the following syntax to modify the LD_LIBRARY_PATH environment variable in the administrator user's .profile or .login file.

For the C shell:

setenv LD_LIBRARY_PATH BGDHOME/lib:$LD_LIBRARY_PATH

For the Bourne shell:

LD_LIBRARY_PATH=BGDHOME/lib:$LD_LIBRARY_PATH

export LD_LIBRARY_PATH

On Windows:

In the Control Panel of the machine on which ECXpert is installed, double-click the System icon, then click the Environment tab. Make sure the PATH environment variable includes the value:

BGDHOME/lib

7. Populate the database.

Use the ECXpert import utility, which is located at `BDGHOME/bin/import`. Type the following command in the Command Prompt window:

```
BDGHOME/bin/import ECX ECX
    TX_HOME/maps_etc/import/tx-mem.imp /tmp/good /tmp/bad
```

where

- ❏ `ECX` is both the username and the password of the ECXpert administrator

- ❏ `TX_HOME/maps_etc/import/tx-mem.imp` is the location of the import file that will populate TradingXpert members, partnership, and service lists

- ❏ `/tmp/good` is the log file that records successful data imports

- ❏ `/tmp/bad` is the log file that records rejected data.

NOTE You will see error messages after running the import command line. Note that one record is rejected: the `EDIFACT INVOIC` partnership does not import correctly. To remedy this, log in to the ECXpert Administration interface and perform the following tasks:

> **1.** Select the partnership of Doc Type `INVOIC`.
>
> **2.** Select the Output EDI tab.
>
> **3.** Change the Standard from `ANSI` to `EDIFACT`.
>
> **4.** In the Version Number field, type "`D`"
>
> **5.** In the Release Number field, type "`97A`"
>
> **6.** Save the partnership.

Deleting Setup Data

To clean up the database and erase all the TradingXpert members, partnerships, and service lists that you just created, follow these steps:

➤ **To delete Test Scenario Setup Data**

1. Log in to the TradingXpert machine as the same user under which you installed TradingXpert.

2. Erase the TradingXpert Commerce Integration Suite test data in the database.

   Use the ECXpert import utility, which is located at `BDGHOME/bin/import`. Type the following command in the Command Prompt window:

   ```
   BDGHOME/bin/import ECX ECX
       TX_HOME/maps_etc/import/del-tx-mem.imp /tmp/good /tmp/bad
   ```

   where

   ❍ `ECX` is both the username and the password of the ECXpert administrator

   ❍ `TX_HOME/maps_etc/import/del-tx-mem.imp` is the location of the import file that will delete the TradingXpert setup data.

   ❍ `/tmp/good` is the log file that records successful data deletions

   ❍ `/tmp/bad` is the log file that records rejected data deletions.

Testing TradingXpert with the Test Scenario

This section describes the procedure for conducting the TradingXpert test scenario: *TXhost* submits a purchase order (EDI doc type = 850) to ECXpert, and *webuser1* uses TradingXpert to retrieve that document and send back an invoice (EDI doc type = 810), as well as an attachment.

➤ **To conduct the TradingXpert test scenario**

1. Open the ECXpert administration interface by entering the following URL in your browser:

   `http://ECXhostname:port/`

   where *ECXhostname* is the name of the host machine where ECXpert is installed, and *port* is the port number ECXpert is using.

   The ECXpert Home Page (Figure 4-13) appears.

Figure 4-13   ECXpert Home Page
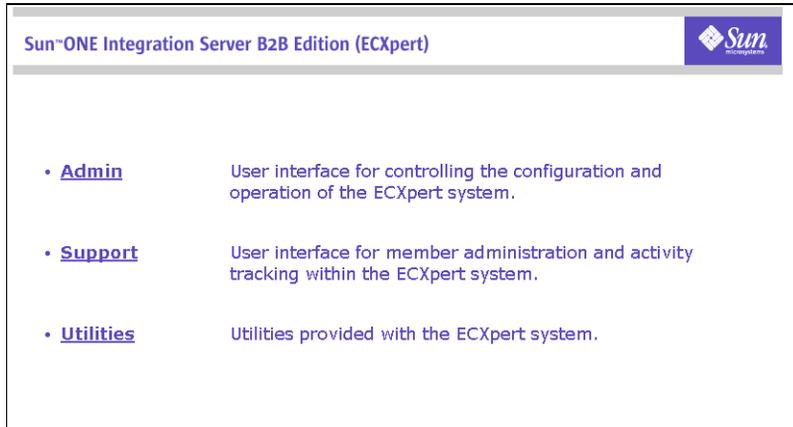
2. Click the Utilities button.

    The ECXpert Utilities Menu (Figure 4-14) appears.

Figure 4-14   ECXpert Utilities Menu

3. Click the Document Submission Form link.

    The Document Submission Form (Figure 4-15) appears.

Figure 4-15   Document Submission Form

4. Enter parameters for the submit command.

    Refer to Table 4-13 for detailed information about the parameters.

Table 4-13   Parameters for *TXhost* Sending Purchase Order to *webuser1*

Parameter	Value	Explanation
Sending Member	TXhost	The sending member's ID
Password	****	Password for the sending member
Receiving Member	webuser1	The receiving member's ID
File Name	850edi.txt	The name of the EDI purchase order file to be submitted to TradingXpert. The demo file, which is included in the /maps_etc/sampledata directory, is named 850edi.txt.
File Type	EDI	The type of data file being submitted to ECXpert

5. Click the Submit button.

    A message appears providing feedback on the command. If any errors are encountered they are displayed first.

6. Optionally, view the tracking information for your submission.

   a. Log in to the ECXpert Product Administrative Interface.

   b. Click the Tracking button on the left.

      The Enter Search Constraints tab appears.

   c. Set Search Level to Document.

   d. Enter today's date.

   e. Click the **Search** button.

7. Open the TradingXpert user interface by entering the following URL in your browser:

   `http://`*TradingXpert_hostname*`:`*port*`/TX`

   where *hostname* is the name of the host machine where TradingXpert is installed, and *port* is the port number TradingXpert is using.

   The TradingXpert Login Screen (Figure 4-16) appears.

Figure 4-16   TradingXpert Login Screen

8. Log in to TradingXpert as webuser1.

   Use the User ID `webuser1` and the Password `webuser1` and click Login.

   The Trade Center Screen (Figure 4-17) appears.

Figure 4-17   Trade Center Screen
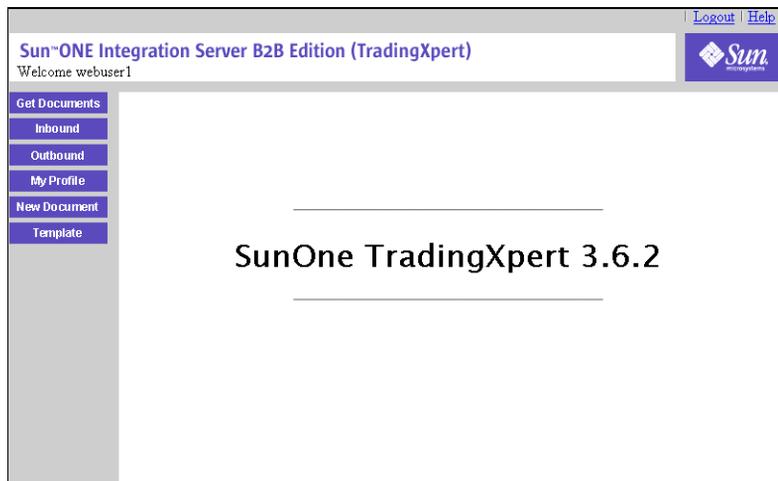
9.   View the incoming purchase order.

a.   Click the Inbound icon to view incoming documents.

The Inbound Documents Screen (Figure 4-18) appears.

Figure 4-18   Inbound Documents Screen
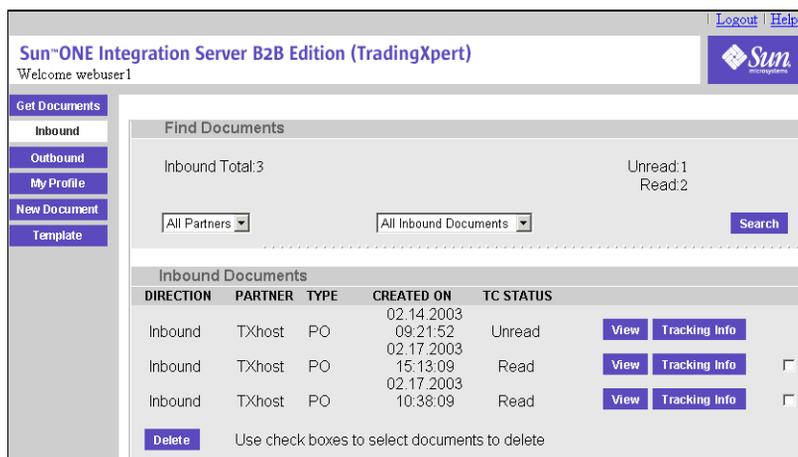
b.   Search for all incoming documents from TXhost.

c. Find the purchase order just sent from TXhost and click View.

The Purchase Order Document (Figure 4-19) is displayed.

Figure 4-19   Purchase Order Document
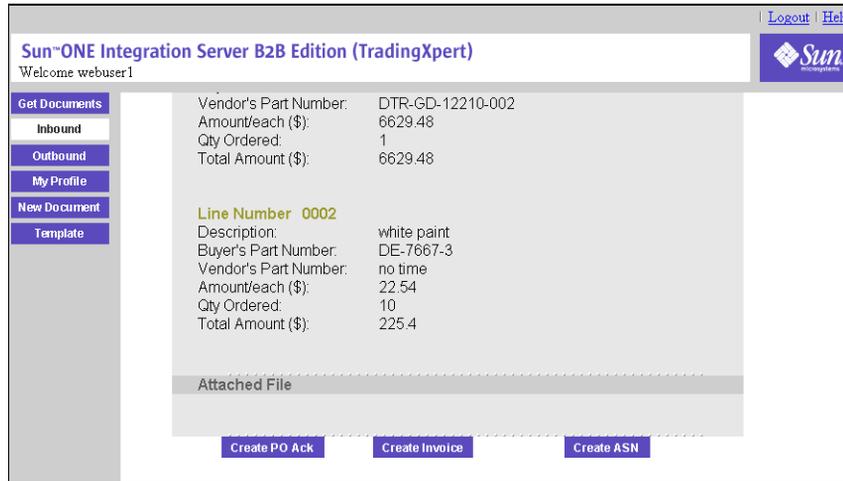
10. Create an invoice from the purchase order.

At the bottom of the purchase order, click the Create Invoice button.

An invoice form (Figure 4-20) will appear; the data fields will be pre-filled with data from the purchase order.

Figure 4-20 Attachment Options at Bottom of an Invoice

11. Attach a file to the invoice.

   At the bottom of the invoice screen is an Attach File section. Attach any file on your hard drive by first either entering the full path of the file or clicking Browse to select a file, and then selecting Any Type from the drop-down menu.

12. Submit the invoice with attachment to TXhost by clicking the Submit Document button.

   A screen will appear confirming that the document was submitted successfully.

13. Verify receipt of the invoice and attachment in ECXpert.

   a. Return to the ECXpert administration interface:

      http://*ECXhostname*:*port*

      where *ECXhostname* is the name of the host machine where ECXpert is installed, and *port* is the port number ECXpert is using.

   b. On the ECXpert home page (Figure 4-13), click Support.

   c. Enter the ECXpert administrator user name and password and click Enter.

   d. Click the Tracking button, then enter search constraints to find the 810 invoice document sent by webuser1 to TXhost.

   e. View tracking information for the inbound document and attached file.

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Section **W**