

Installation and Configuration Guide

Microsoft Windows NT/2000 $^{\rm @}$ Operating Systems and the BEA WebLogic $^{\rm @}$ Server



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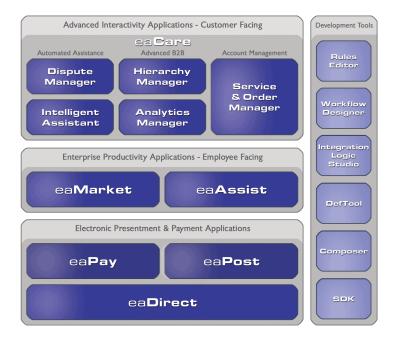
Preface

About Customer Self-Service and eaSuite™

edocs has developed the industry's most comprehensive software and services for deploying Customer Self-Service solutions. eaSuiteTM combines electronic presentment and payment (EPP), order management, knowledge management, personalization and application integration technologies to create an integrated, natural starting point for all customer service issues, eaSuite's unique architecture leverages and preserves existing infrastructure and data, and offers unparalleled scalability for the most demanding applications. With deployments across the healthcare, financial services, energy, retail, and communications industries, and the public sector, eaSuite powers some of the world's largest and most demanding customer self-service applications, eaSuite is a standards-based, feature rich, and highly scalable platform, that delivers the lowest total cost of ownership of any self-service solution available.

eaSuite is comprised of four product families:

- Electronic Presentment and Payment (EPP) Applications
- Advanced Interactivity Applications
- **Enterprise Productivity Applications**
- **Development Tools**



Electronic Presentment and Payment (EPP) Applications are the foundation of edocs' Customer Self-Service solution. They provide the core integration infrastructure between organizations' backend transactional systems and end users, as well as rich e-billing, e-invoicing and e-statement functionality. Designed to meet the rigorous demands of the most technologically advanced organizations, these applications power Customer Self-Service by managing transactional data and by enabling payments and account distribution.

eaDirectTM is the core infrastructure of enterprise Customer Self-Service solutions for organizations large and small with special emphasis on meeting the needs of organizations with large numbers of customers, high data volumes and extensive integration with systems and business processes across the enterprise. Organizations use eaDirect with its data access layer, composition engine, and security, enrollment and logging framework to power complex Customer Self-Service applications.

eaPay™ is the electronic payment solution that decreases payment processing costs, accelerates receivables and improves operational efficiency. eaPay is a complete payment scheduling and warehousing system with real-time and batch connections to payment gateways for Automated Clearing House (ACH) and credit card payments, and payments via various payment processing service providers.

eaPost® is the account content distribution system that handles all the complexities of enrollment, authentication and secure distribution of summary account information to any endpoint, while also bringing customers back the organization's Website to manage and control their self-service experience.

Advanced Interactivity Applications are a comprehensive set of advanced customer-facing self-service capabilities that enable the full range of business and consumer customer service activities. These sophisticated modules have the flexibility to completely customize the Customer Self-Service solution to meet vertical industry and specific company requirements.

eaCareTM consists of a rich set of sophisticated self-service modules – Dispute Manager, Intelligent Assistant, Hierarchy Manager, Analytics Manager, and Service and Order Manager - for automated assistance, advanced business-to-business applications and account management. These capabilities come together to create a web self-service dashboard for customers to access all service offerings from a single, easy-to-use interface. eaCare's modularity accelerates time to market with components that can be deployed incrementally in a phased approach.

Enterprise Productivity Applications are employee-facing solutions that empower customer service representatives, sales agents, account managers, marketing managers, broker-dealers and channel partners within an organization and external partner organizations to facilitate self-service and to support assisted service. Employees leverage edocs' Customer Self-Service solution to deliver customer service, access information, create and deploy marketing and customer service content, and perform activities for the benefit of customers.

eaAssistTM reduces interaction costs and increases customer satisfaction by enabling enterprise agents – customer service representatives (CSRs), sales agents, broker-dealers and others - to efficiently access critical account data and service-related information to effectively service customers. Through its browser interface designed especially for the enterprise agent, eaAssist enables agents to take advantage of customer-facing online capabilities to provide better service by more efficiently resolving customer account inquiries at the point of customer contact.

eaMarketTM is the personalization, campaign and content management solution that enables organizations to increase revenue and improve customer satisfaction by weaving personalized marketing and customer service messages throughout the Customer Self-Service experience. The transactional account data that provides the foundation for a Customer Self-Service solution – such as transaction activity, service or usage charges, current task and prior service history – bring valuable insight into customers and can help optimize personalized marketing and customer service campaigns, eaMarket leverages that data to present relevant marketing and customer service messages to customers.

edocs' **Development Tools** are visual development environments for designing and configuring edocs' Customer Self-Service solutions. The Configuration Tools encompass data and rules management, workflow authoring, systems integration, and a software development kit that makes it easy to create customer and employee-facing self-service applications leveraging eaSuite.

About eaMarket

eaMarket is the personalization management solution that enables companies to increase revenue and improve customer satisfaction by weaving personalized marketing and customer service messages throughout the online account management experience.

The online statement is the best platform to create recurring one-to-one relationships with your customers, as it provides personal, time-sensitive and financially relevant information. Transactional account data – such as purchase history, investment activity and service and usage charges – allows you to gain the most insight into your customers and optimally personalize your marketing campaigns. With eaMarket, you can deploy targeted marketing and customer service messages based on the customer's dynamic account and transaction data.

Online marketing demands real actions in real time. eaMarket allows your marketing team to design, schedule, evaluate, and manage the entire process from anywhere on your network – all from a browser-based user interface that operates without heavy involvement from your IT department.

Move beyond your competition. Use eaMarket to send your customers personalized e-sertsTM instead of envelopes full of one-size-fits-all inserts. Increase cross-sell and up-sell offer acceptance rates with personalized messages that are based on your customer's actual account activity.

With eaMarket, you can deliver the right message to the right customer at the right time.

About This Guide

This guide describes how to install and configure eaMarket. eaMarket requires eaDirect to be installed and configured before installing eaMarket.

Related Documentation

This guide is part of the eaMarket documentation set. For more information about implementing your eaMarket application, see one of the following guides:

Online	How to Access
Help	Select Help from the eaMarket configuration screens.
C	A PDF of this guide is available on the eaDirect product CD-ROM.

This guide is part of the eaMarket documentation set. For more information about implementing your eaMarket application, see one of the following guides:

Print Document	Description
eaMarket TM User's Guide	Explains what you need to know to use the eaMarket application to manage marketing promotions, content, business conditions, and workflow.
eaMarket TM Installation and Configuration Guide: for the Solaris TM Operating Environment TM Software	Explains how to install and configure eaMarket for a Solaris environment.
eaMarket TM Installation and Configuration Guide: for the Windows/NT TM Operating Environment TM Software	Explains how to install and configure eaMarket for a Windows environment.
eaDirect Installation and Configuration Guide	How to install eaDirect and configure it in a distributed environment.
Data Presentation Production Guide	How to set up and run a live eaDirect application in a J2EE environment.
Deploying and Customizing J2EE Applications	How to customize J2EE web applications for deployment with the eaSuite.

The eaSuite products eaDirect, eaPost, eaPay, and eaAssist provide their own documentation.

If You Need Help

Technical support is available to customers who have valid maintenance and support contracts with edocs. Technical support engineers can help you install, configure, and maintain your edocs application.

edocs provides global Technical Support services from the following Support Centers:

US Support Center

Natick, MA

Mon-Fri 8:30am - 8:00pm US EST

Telephone: 508-652-8400

Europe Support Center

London, United Kingdom Mon-Fri 9:00am – 5:00 GMT Telephone: +44 20 8956 2673

Asia Pac Rim Support Center

Melbourne, Australia Mon-Fri 9:00am – 5:00pm AU Telephone: +61 3 9909 7301

Customer Central

https://support.edocs.com

Email Support

mailto:support@edocs.com

When you report a problem, please be prepared to provide us the following information:

- What is your name and role in your organization?
- What is your company's name?
- What is your phone number and best times to call you?
- What is your e-mail address?
- In which edoes product did a problem occur?

Preface

- What is your Operating System version?
- What were you doing when the problem occurred?
- How did the system respond to the error?
- If the system generated a screen message, please send us that screen message.
- If the system wrote information to a log file, please send us that log file.

If the system crashed or hung, please tell us.

Preparing For Installation

System Requirements

For the latest software and hardware requirements for both eaMarket and eaDirect, see the release notes that came with your distribution.

Pre-installation Tasks

Before you install the eaMarket components, there are several prerequisites that need to be addressed to ensure that the operating system and software programs that eaMarket uses are installed and configured correctly.

1. First, you must install and configure the Application Server and Database Server components of eaDirect Version 4.0 as described in the *eaDirect Installation and Configuration Guide*. Then, you can continue with the following steps to configure the server running eaMarket, which assumes that eaMarket will be installed on a separate server from the eaDirect servers:



It is important that the products below are installed in the order they are listed.

- 2. Install the Windows operating system.
- 3. Install the Sun JDK 1.3.1 03 or a higher SP of the Sun JDK 1.3.1 release.
- 4. Install Microsoft SQL Server 2000, if the eaMarket database is on the eaMarket server. Install Microsoft SQL Server 2000 Client, if the database is on a different server.

5. Install WebLogic Server WebLogic Server 6.1 with Service Pack 3 or WebLogic Server 7.0



WebLogic should NOT be installed as a Windows Service.

Installing eaMarket

eaMarket works in conjunction with an existing eaDirect application. eaMarket can be installed on the same server as eaDirect (the eaDirect Application Server), or run on its own server for performance or security reasons. This document describes how to install eaMarket on separate servers for eaMarket, the database and the eaMarket tracking component on eaDirect.



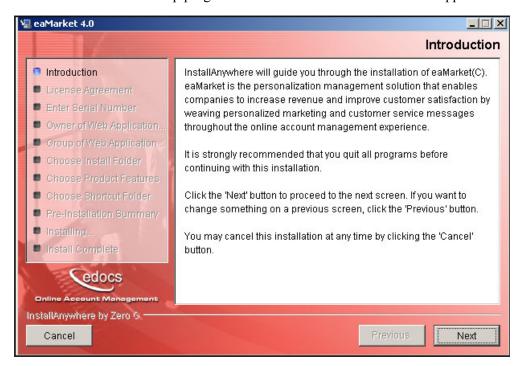
When installing eaMarket on different servers, be sure to use the same root path on all servers. For example, assume eaMarket is installed in C:\EDCSmkt. C:\EDCSmkt is the root path, so if the eaMarket database is on a different machine, then the database should be installed in C:\EDCSmkt. If the tracking component is on a different system, then it should be installed in C:\EDCSmkt on the eaDirect server.

Installing eaMarket on the Database Server



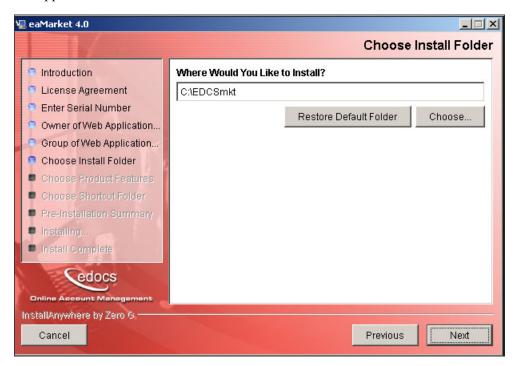
Running the Installation Program

1. Run the eaMarket Setup program. The eaMarket installation wizard appears.



2. Click Next. The next wizard displays the license agreement. Accept the license agreement and click Next.

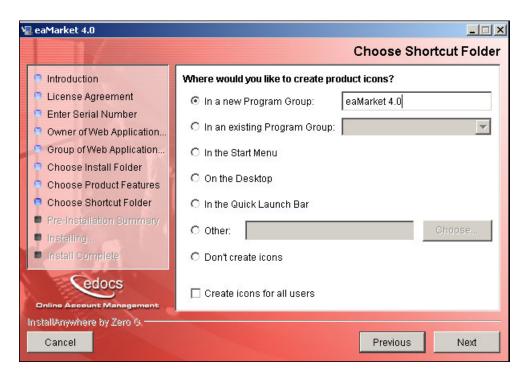
3. In the next wizard, enter the serial number and click **Next**. The next wizard appears.



- 4. Enter the eaMarket installation folder. The default installation folder is *C:\EDCSmkt*.
- 5. Click Next. The next wizard appears.



6. Select **Database** as the installation option and click **Next**. The next wizard appears.



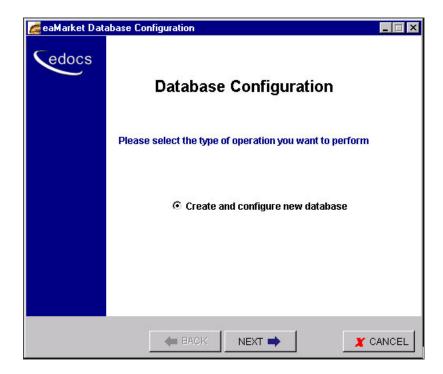
7. Specify where the product icons should be created and click **Next**. The next wizard appears.



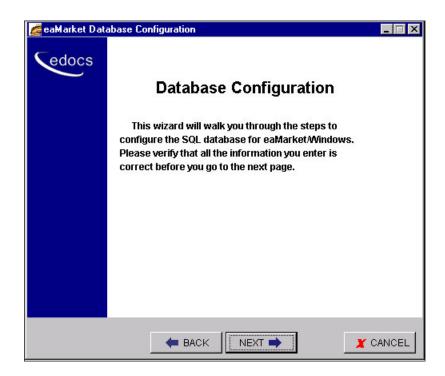
8. All the installation options you selected will be displayed. If necessary, click **Previous** and change any of the options, otherwise click **Install** to start the installation.

Creating the Database

- 1. Open a command prompt and go to the *<eaMarket Install>\db\mssql* folder.
- 2. Type in the following command to start the database configuration tool: java -jar DBConfigTool.jar
- 3. The eaMarket Database Configuration wizard appears.



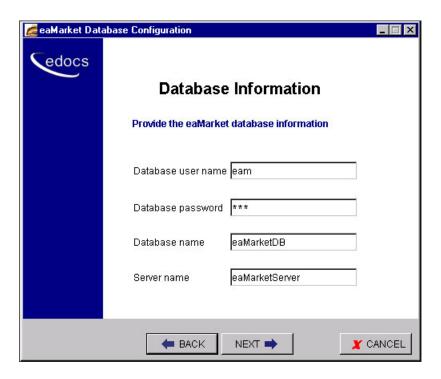
4. Click Next to continue the installation. The next wizard appears.



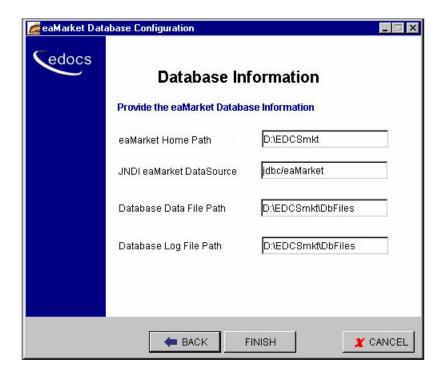
5. Click Next. The next wizard appears.



6. Enter the admin name and the admin password and click **Next**. The next wizard appears.



- 7. Enter the database user name.
- 8. Enter the database password.
- 9. Enter the database name.
- 10. Enter the server name.
- 11. Click Next. The next wizard appears.

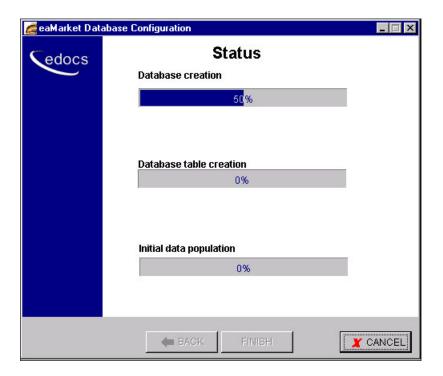


- 12. Enter the eaMarket home path.
- 13. Enter the JNDI name of the eaMarket data source.

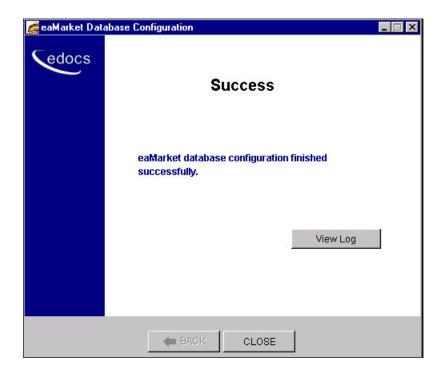


Remember the Data Source Name, which is used to configure WebLogic for eaMarket.

- 14. Enter the database data file path.
- 15. Enter the log file path.
- 16. Click Finish. The next wizard appears.



17. If the installation is successful, the next wizard appears.



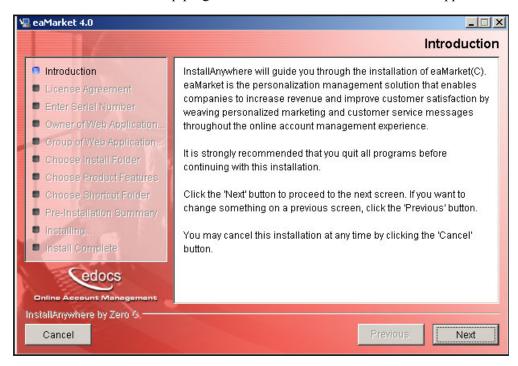
18. Click Close.

Installing eaMarket on the Application Server



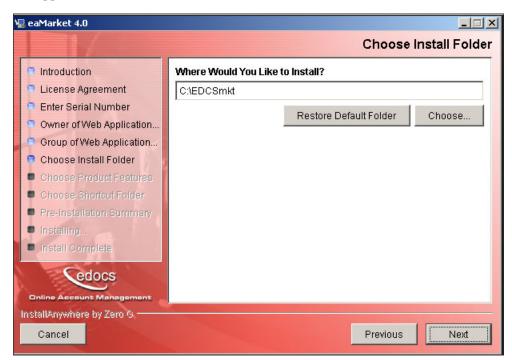
Running the Installation Program

1. Run the eaMarket Setup program. The eaMarket installation wizard appears.



2. Click Next. The next wizard displays the license agreement. Accept the license agreement and click Next.

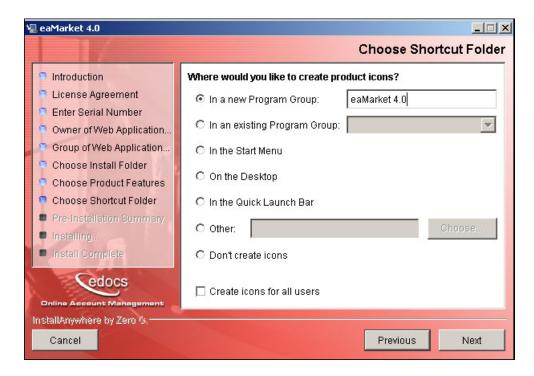
3. In the next wizard, enter the serial number and click **Next**. The next wizard appears.



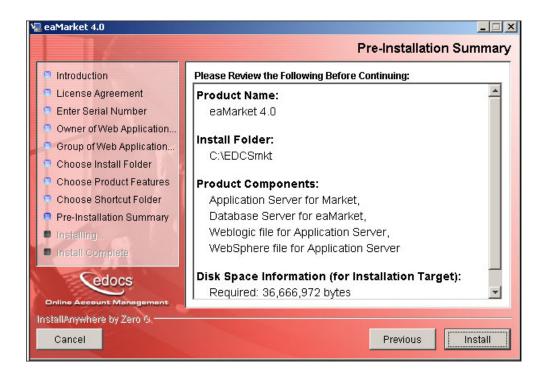
- 4. Enter the eaMarket installation folder. The default installation folder is *C:\EDCSmkt*.
- 5. Click Next. The next wizard appears.



6. Select Standalone as the installation option and click Next. The next wizard appears.



7. Specify where the product icons should be created and click **Next**. The next wizard appears.



8. All the installation options you selected will be displayed. If necessary, click **Previous** and change any of the options, otherwise click **Install** to start the installation.

Configuring the eaMarket Application Server

Configuring the eaMarket application server consists of updating the WebLogic startup script to add the necessary information to support WebLogic, configuring WebLogic for eaMarket through the WebLogic console, and deploying the eaMarket application in WebLogic.

To Update the Startup Script for WebLogic 6.1

1. Change the working directory to the WebLogic domain directory. For example:

```
cd c:\bea\wlserver6.1\config\mydomain\
```

- 2. Open startWebLogic.cmd with an editor.
- 3. Add the following to the CLASSPATH:

```
<eaMarket install>\lib\crimson.jar
<eaMarket_install>\lib\jaxp.jar
<eaMarket_install>\lib\xerces.jar
<eaMarket install>\lib\eaMarket.jar
```

The following example shows a **CLASSPATH** where eaMarket is installed in c:\eaMarket:

```
CLASSPATH=.;c:\eaMarket\lib\crimson.jar;c:\eaMarket\lib\
jaxp.jar;c:\eaMarket\lib\xerces.jar;c:\eaMarket\lib\eaMa
rket.jar;.\lib\weblogic sp.jar;.\lib\weblogic.jar
```



The paths for crimson.jar, jaxp.jar, xerces.jar must be set before any WebLogic .jar files.

4. If the data source name is not the default jdbc/eaMarket, then add the following to the Java properties:

-DeaMDataStore=<DataSource Name>

DataSource Name is the JDBC Data Source name used when configuring WebLogic.



This property MUST be inserted before

-Dweblogic.management.password=%WLS PW weblogic.Server

For example:

```
%JAVA HOME%\bin\java %JAVA OPTIONS%
-classpath %CLASSPATH%
-Dweblogic.Domain=mydomain
-Dweblogic.Name=myserver "
-Dbea.home=C:\bea" "
-Djava.security.policy==
C:\bea\wlserver6.1\lib\weblogic.policy" "
-DeaMDataStore=jdbc\edocs
-Dweblogic.management.password=
edocsedocs weblogic.Server
```

- 5. Change the JAVA OPTIONS -ms64m -mx64m to -ms128m -mx128m.
- Save and close the file.

To Update the Startup Script for WebLogic 7.0

1. Change the working directory to the WebLogic domain directory. For example:

```
cd C:\bea\weblogic700\config\mydomain\
```

2. Open startWebLogic.cmd with an editor.

3. Add the following to the CLASSPATH:

```
<eaMarket_install>\lib\crimson.jar
<eaMarket_install>\lib\jaxp.jar
<eaMarket_install>\lib\xerces.jar
<eaMarket_install>\lib\eaMarket.jar
```

The following example shows a **CLASSPATH** where eaMarket is installed in *C*:*EDSCmkt*:

```
CLASSPATH=.;C:\EDCSmkt\lib\crimson.jar;C:\EDCSmkt
\lib\jaxp.jar;C:\EDCSmkt\lib\xerces.jar;C:\EDCSmkt
\lib\eaMarket.jar;C:\bea\weblogic700\lib\weblogic_sp.jar
;.\lib\weblogic.jar
```

Caution

The paths for *crimson.jar*, *jaxp.jar*, *xerces.jar* must be set before any WebLogic *.jar* files.

4. If the datasource name is not the default jdbc/eaMarket, then add the following to the Java properties:

-DeaMDataStore=<DataSource Name>

DataSource Name is the JDBC Data Source name used when configuring WebLogic.



This property MUST be inserted before

-Dweblogic.management.password=%WLS_PW% weblogic.Server

For example:

```
%JAVA_HOME%\bin\java %JAVA_OPTIONS%
-classpath %CLASSPATH%
-Dweblogic.Domain=mydomain
-Dweblogic.Name=myserver "
-Dbea.home=C:\bea\weblogic700" "
-Djava.security.policy==
C:\bea\weblogic700\server\lib\weblogic.policy" "
-DeaMDataStore=jdbc/eaMarket
-Dweblogic.management.password=
edocsedocs weblogic.Server
```

- 5. Add the following parameter to JAVA OPTIONS: -ms128m -mx128m.
- 6. Save and close the file.

To Modify the edx_mwi.config.bat File for eaDirect

Carry out the following steps if eaMarket and eaDirect reside on the same server.

- 1. Go to the <eaDirect installation folder>\ Config folder and open the edx_mwi.config.bat file.
- 2. Change the value of the -Dedx.web.public parameter to the web root folder in WebLogic as follows:

```
@set JAVA_OPTIONS=%JAVA_OPTIONS% -Dedx.web.public=<web
root folder>
```

Example for WebLogic 6.1:

@set JAVA_OPTIONS=%JAVA_OPTIONS% -Dedx.web.public=
c:\bea\wlserver6.1\config\mydomain\applications\DefaultW
ebApp

Example for WebLogic 7.0:

@set JAVA_OPTIONS=%JAVA_OPTIONS% -Dedx.web.public=
C:\bea\weblogic700\config\mydomain\applications\DefaultW
ebApp\

3. Save and close the file.

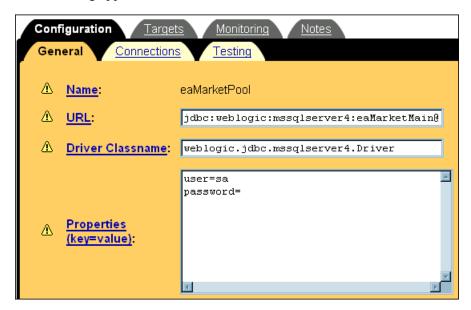
Configuring WebLogic 6.1 for eaMarket

To Create the Connection Pool

1. Login to the WebLogic console. For example:

http://dusky:7001/console

2. Select Mydomain, then Services, then JDBC, then Connection Pools. Click Create a new JDBC Connection Pool. A screen similar to the following appears:



3. Enter the following:

Field	Description
Connection Pool Name	This field shows the Connection Pool Name you entered when creating this JDBC Connection Pool.
URL	URL for the database as specified by JDBC, of the form: jdbc:weblogic:mssqlserver4: <database name=""> @<server_name ip="">:<port> For example: jdbc:weblogic:mssqlserver4:eaMarketDB@eaMarketServer:1433</port></server_name></database>
Driver class name	The name of the JDBC driver class, which is weblogic.jdbc.mssqlserver4.Driver.

Field	Description
Properties	Enter the following values:
	user= <user name=""> password=<password></password></user>

- 4. Click Create.
- 5. Click the Connections tab.

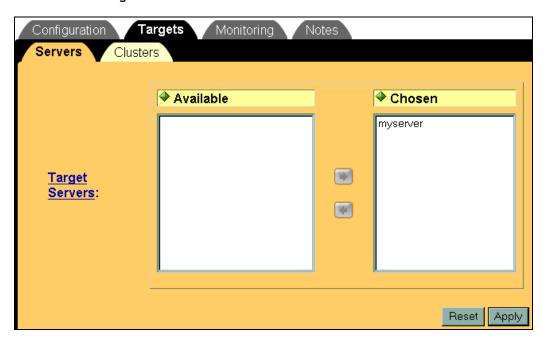


- 6. Enter the values shown in the above image and click Apply.
- 7. Click the **Testing** tab.

Installing eaMarket on the Application Server



- 8. Enter tbluser for TestTable Name. Select the Test Reserved Connections and Test Released Connections check boxes.
- 9. Click Apply.
- 10. Click the Targets tab.

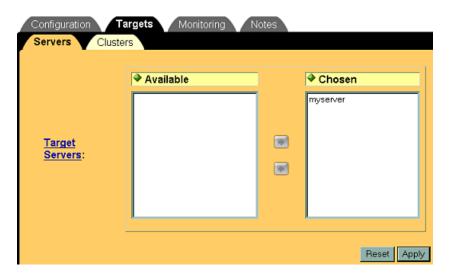


11. Select the eaMarket server (myserver) and click Apply.

- 12. Select Mydomain, then Services, then JDBC, then Data Sources.
- 13. Click the Create a new JDBC Data Source link.



- 14. Enter the JNDI Name: jdbc/eaMarket. (Use the name given during installation for JNDI Name).
- 15. Enter the connection pool name that you gave in step 2 above.
- 16. Click Create.
- 17. Click the Targets tab.



18. Select the required server and click Apply.

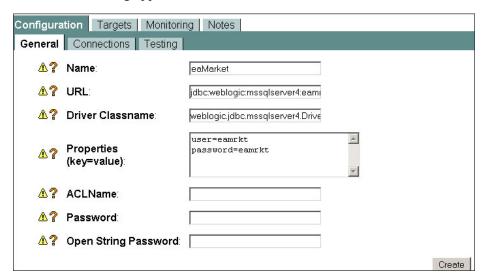
Configuring WebLogic 7.0 for eaMarket

To Create the Connection Pool

1. Login to the WebLogic console. For example:

http://dusky:7001/console

2. Select Mydomain, then Services, then JDBC, then Connection Pools. Click Configure a new JDBC Connection Pool.... A screen similar to the following appears:



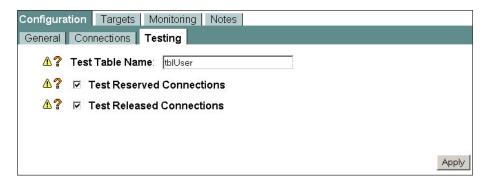
3. The parameters for this screen are described in the following table:

Field	Description
Name	This field shows the connection pool name you entered when creating this JDBC Connection Pool.
URL	URL for the database as specified by JDBC, of the form: jdbc:weblogic:mssqlserver4: <database name=""> @<server_name ip="">:<port> For example: jdbc:weblogic:mssqlserver4:eaMarketDB@ea MarketServer:1433</port></server_name></database>
Driver class name	The name of the JDBC driver class, which is weblogic.jdbc.mssqlserver4.Driver.
Properties	Enter the following values: user= <user name=""> password=<password></password></user>

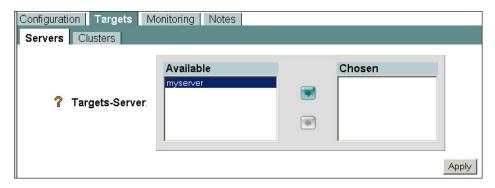
- 4. Click Create.
- 5. Click the Connections tab.

Configura	ation Targets Monitoring Note	s	
General	Connections Testing		
≙?	Initial Capacity:	10	
△?	Maximum Capacity:	20	
≙?	Capacity Increment	1	
≙?	Login Delay Seconds:	0 seconds	
△?	Refresh Period:	2 minutes	
△?	☐ Supports Local Transaction		
^?	E Allana Chaimlein a		
0.100-1	✓ Allow Shrinking		
_ ^?	Shrink Period:	15 minutes	
≙?	Prepared Statement Cache Size:	0	
			Apply

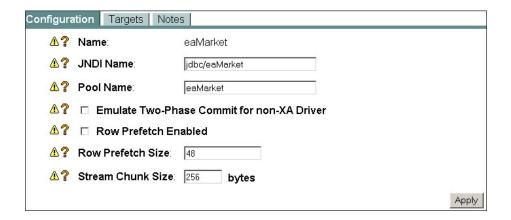
- 6. Enter the values shown in the above image and click Apply.
- 7. Click the Testing tab.



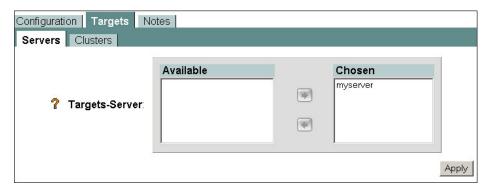
- 8. Enter tblUser for TestTable Name. Select the Test Reserved Connections and Test Released Connections check boxes. Click Apply.
- 9. Click the Targets tab.



- 10. Move the eaMarket server (myserver) to the Chosen column by clicking the arrow. Click Apply.
- 11. Select Mydomain, then Services, then JDBC, then Data Sources.
- 12. Click the Create a new JDBC Data Source link.



- 13. Enter jdbc/eaMarket as the JNDI name (use the name given during installation for the JNDI Name).
- 14. Enter the connection pool name that you gave in step 2 above. Click Apply.
- 15. Click the Targets tab.



16. Select the required server and click Apply.

To Deploy the eaMarket Application Archive on WebLogic 6.1

1. Select Mydomain, then Deployments, then Applications.

2. Click Install a new Application. The following screen appears:

Upload and Install an Application Click on the 'browse' button below to locate an application archive on your local hard drive. When you have located the file, click 'upload' to install it on this WebLogic Administration Server. The following types of application files may be uploaded: • A .jar containing EJBs (Enterprise Java Beans) • A .war (Web Application Archive) containing JSPs and Servlets • An .ear (J2EE Enterprise Application Archive) containing both EJBs and web applications Note: if you browse for the file, you may have to adjust the file-type filter to 'All' in order to find .jar, .war, and .ear files.

- 3. Click Browse and go to the < eaMarket_install > \J2EEApps\weblogic folder. Select the eaMarket.ear file and click Upload.
- 4. Verify that the **Deployments** tree has the following eaMarket entries.



5. Select Deployments, then Applications, then eaMarket. The following screen appears:

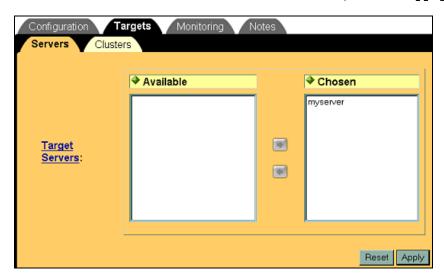


- 6. Verify that Deployed is selected. If not, select it and click Apply.
- 7. Select Deployment, then Application, then eaMarket, then eaMarket (for eaMarket.war).

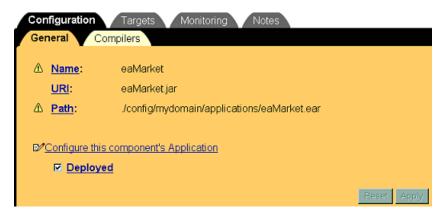


8. Verify that Deployed is selected. If not, select it and click Apply.

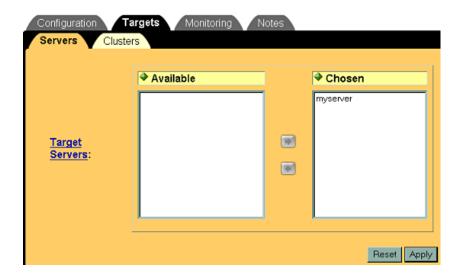
9. Click the Targets tab and verify that the required server is selected. If not, click on the arrow to move it to the Chosen column, and click Apply.



10. Select Deployment, then Application, then eaMarket, then eaMarket (for eaMarket.jar).



- 11. Verify that Deployed is selected. If not, select it and click Apply.
- 12. Click the Targets tab and verify that the required server is selected. If not, click on the arrow to move it to the Chosen column, and click Apply.

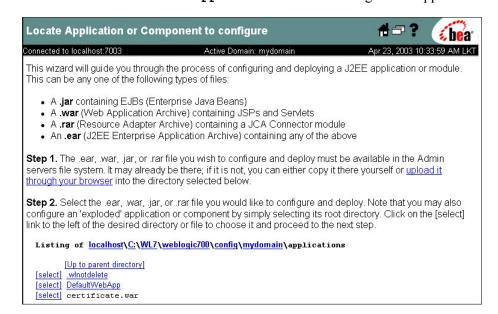


13. Restart the WebLogic server.

To Deploy the eaMarket Application Archive on WebLogic 7.0

1. Select Mydomain, then Deployments, then Applications.

2. Click Install a new Application. The following screen appears:

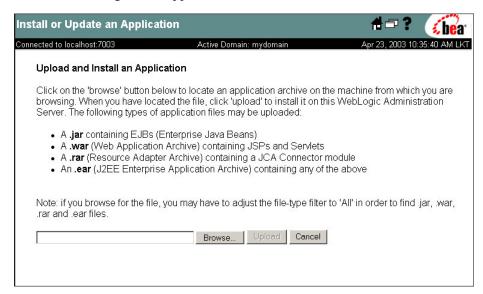


3. Click the upload it through your browser link.



You must copy the .ear file from the eaMarket application server in the <eaMarket_install>\J2EEApps\weblogic directory to the system you are running the browser on in order to locate the .ear file.

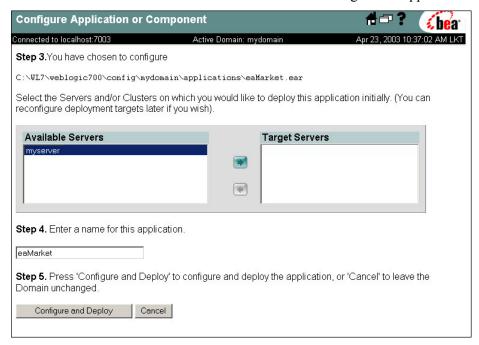
4. The following screen appears:



5. Click Browse and go to the < eaMarket Install > J2EEApps | weblogic folder. Select the eaMarket.ear file and click Upload. The previous screen will appear with the eaMarket.ear file at the bottom.

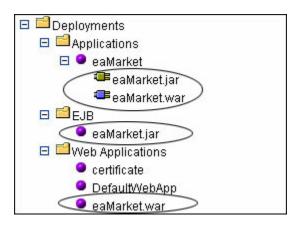


6. Click the Select link next to eaMarket.ear. The following screen appears:



7. Move the eaMarket server (myserver) to the Target Servers column by clicking the arrow.

- 8. Click Configure and Deploy.
- 9. Verify that the Deployments tree has the following eaMarket entries.



10. Restart the WebLogic server.

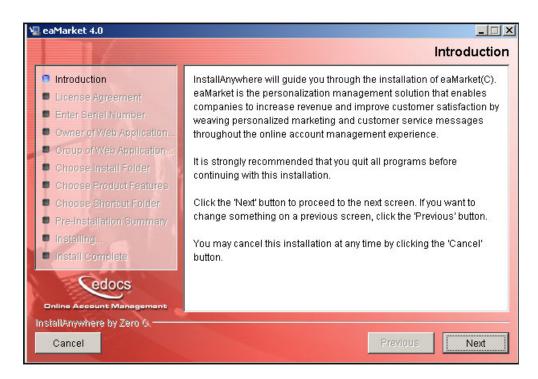
Installing eaMarket Integration Components for eaDirect

4

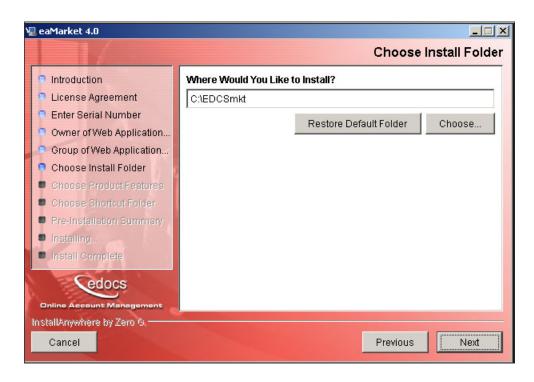
This section describes how to install the eaMarket components on the eaDirect application server, the *edocs - eaMarket Promotion Management System - Standalone Tracking Component*, and how to configure support for a non-clustered environment. This package should be installed on the eaDirect Application server for separate eaDirect and eaMarket servers. If eaMarket is installed on the same server as eaDirect, then this component does not need to be installed on that server.

Running the Installation Program

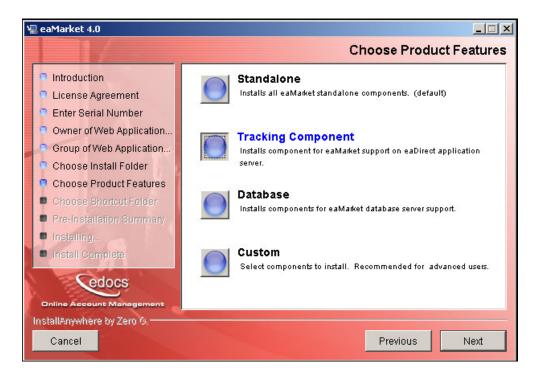
1. Run the eaMarket Setup program. The eaMarket installation wizard appears.



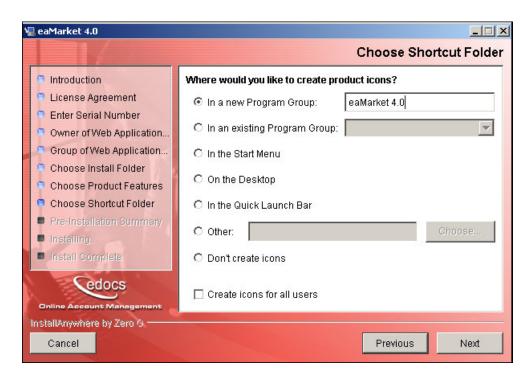
- 2. Click Next. The next wizard displays the license agreement. Accept the license agreement and click Next.
- 3. In the next wizard, enter the serial number and click **Next**. The next wizard appears.



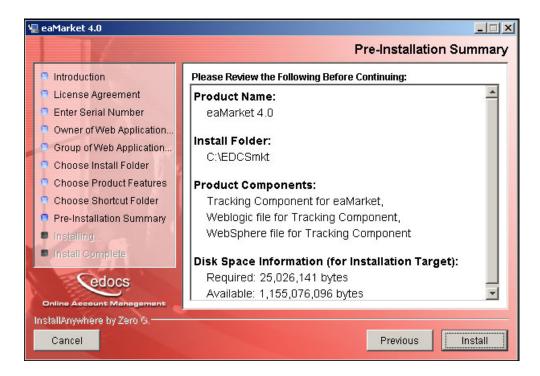
- 4. Enter the eaMarket installation folder. The default installation folder is *C:\EDCSmkt*.
- 5. Click Next. The next wizard appears.



6. Select Tracking Component as the installation option and click Next. The next wizard appears.



7. Specify where the product icons should be created and click **Next**. The next wizard appears.



8. All the installation options you selected will be displayed. If necessary, click **Previous** and change any of the options, otherwise click **Install** to start the installation.

Configuring the eaMarket Integration Components for eaDirect

Configuring the eaMarket integration components consists of updating the WebLogic startup script to add the necessary information to support WebLogic, and deploying the eaMarket Tracking application in WebLogic.

To Update the Startup Script for WebLogic 6.1

1. Change the working directory to the WebLogic domain directory. For example:

```
cd c:\bea\wlserver6.1\config\mydomain\
```

- 2. Open startWebLogic.cmd with a text editor.
- 3. Add the following to the CLASSPATH:

```
<eaMarket_install>\lib\crimson.jar
<eaMarket install>\lib\jaxp.jar
```

The following example shows the CLASSPATH where eaMarket is installed in *C:\EDCSmkt*:

CLASSPATH=.;C:\EDCSmkt\Lib\crimson.jar;C:\EDCSmkt\Lib\ja
xp.jar;.\lib\weblogic sp.jar;.\lib\weblogic.jar



The paths for *crimson.jar*, *jaxp.jar*, must be set before any WebLogic *.jar* files

4. Add the following parameter to the Java Options section:

```
-DPROPDIR=<eaMarket install>
```

For example:

```
"%JAVA_HOME%\bin\java" %JAVA_OPTIONS%
-classpath %CLASSPATH%
-Dweblogic.Domain=mydomain
-Dweblogic.Name=myserver "
-Dbea.home=C:\bea" "-Djava.security.policy==
C:\bea\wlserver6.1/lib/weblogic.policy"
-DPROPDIR=C:\EDCSmkt
-Dweblogic.management.password=weblogic weblogic.Server
```



These properties should be inserted before:

- -Dweblogic.management.password=%WLS PW%
- 5. Save and close the file.

To Update the WebLogic 7.0 Startup Script

1. Change the working directory to the WebLogic domain directory. For example:

```
cd c:\bea\WebLogic700\config\mydomain\
```

- 2. Open startWebLogic.cmd with a text editor.
- 3. Add the following to the CLASSPATH:

```
<eaMarket_install>\lib\crimson.jar
<eaMarket install>\lib\jaxp.jar
```

The following example shows the CLASSPATH where eaMarket is installed in *c*:\EDCSmkt:

```
CLASSPATH=.;c:\EDCSmkt\Lib\crimson.jar;c:\EDCSmkt\Lib\ja
xp.jar;C:\bea\WebLogic700\lib\weblogic_sp.jar;.\lib\weblogic.jar
```



The paths for *crimson.jar*, *jaxp.jar*, must be set before any WebLogic *.jar* files.

4. Add the following parameter to the Java Options section:

```
-DPROPDIR=<eaMarket install>
```

For example:

- "%JAVA HOME%\bin\java" %JAVA OPTIONS%
- -classpath %CLASSPATH%
- -Dweblogic.Domain=mydomain
- -Dweblogic.Name=myserver "
- -Dbea.home=C:\bea\WebLogic700" "-Djava.security.policy==
- C:\bea\WebLogic700/lib/weblogic.policy"
- -DPROPDIR=C:\EDCSmkt

Dweblogic.management.password=weblogic weblogic.Server



These properties should be inserted before:

- -Dweblogic.management.password=%WLS PW%
- 5. Save and close the file.

To Modify the eaMarket.config File

1. Go to the eaMarket installation folder and open the eaMarket.config file.

2. Change the parameters to the following values:

```
configPath=<eaMarket installation folder>
tracker.eaMarketURL=http://<serverName or IP>:<port>
tracker.trackerLogFileName=<eaMarket installation</pre>
folder>\temp\eaMarket.log
tracker.trackRecorderName=<eaMarket installation</pre>
folder>\temp\eaMarket.track
webInterface.pathFileUpload=<eaMarket installation</pre>
folder>\temp
fileCachePath=<eaMarket installation folder>\temp\
tempPath=<eaMarket installation folder>\temp\
For example:
configPath=C:\EDCSmkt
tracker.eaMarketURL=http://10.2.1.155:7001
tracker.trackerLogFileName=C:\EDCSmkt\temp\eaMarket.log
tracker.trackRecorderName=C:\EDCSmkt\temp\eaMarket.track
webInterface.pathFileUpload=C:\EDCSmkt\temp
fileCachePath=C:\EDCSmkt\temp\
tempPath=C:\EDCSmkt\temp\
```

3. Save and close the file.

To Modify the edx_mwi.config.bat File for eaDirect

- 1. Go to the <eaDirect installation folder>\Config folder and open the edx mwi.config.bat file.
- 2. Change the value of the -Dedx.web.public parameter to the web root folder in WebLogic as follows:

```
@set JAVA_OPTIONS=%JAVA_OPTIONS% -Dedx.web.public=<web
root folder>
```

Example for WebLogic 6.1:

```
@set JAVA_OPTIONS=%JAVA_OPTIONS% -Dedx.web.public=
c:\bea\wlserver6.1\config\mydomain\applications\DefaultW
ebApp
```

Example for WebLogic 7.0:

```
@set JAVA_OPTIONS=%JAVA_OPTIONS% -
Dedx.web.public=C:\bea\weblogic700\config\mydomain\appli
cations\DefaultWebApp\
```

3. Save and close the file.

To Deploy the eaMarket Web Archive File on WebLogic 6.1

- 1. Select Mydomain, then Deployments, then Applications.
- 2. Click Install a new Application. The following screen appears:

Upload and Install an Application

Click on the 'browse' button below to locate an application archive on your local hard drive. When you have located the file, click 'upload' to install it on this WebLogic Administration Server. The following types of application files may be uploaded:

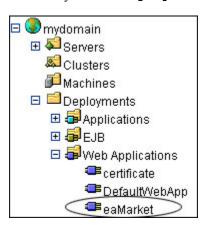
- A .jar containing EJBs (Enterprise Java Beans)
- . A .war (Web Application Archive) containing JSPs and Servlets
- An .ear (J2EE Enterprise Application Archive) containing both EJBs and web applications

Note: if you browse for the file, you may have to adjust the file-type filter to 'All' in order to find .jar, .war, and .ear files.



3. Click Browse and go to the < eaMarket_install > \J2EEApps\weblogic folder. Select the eaMarket.war file and click Upload.

4. Verify that the **Deployments** tree has the following eaMarket entries.

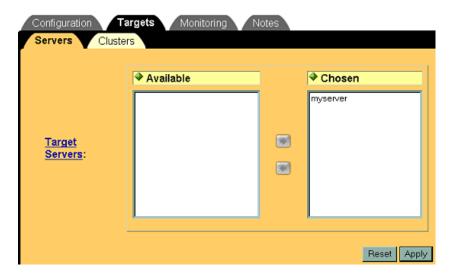


5. Select Deployments, then Applications, then eaMarket. The following screen appears:



6. Verify that Deployed is selected. If not, select it and click Apply.

7. Click the Targets tab and verify that the required server is selected. If not, click on the arrow to move it to the Chosen column, and click Apply.

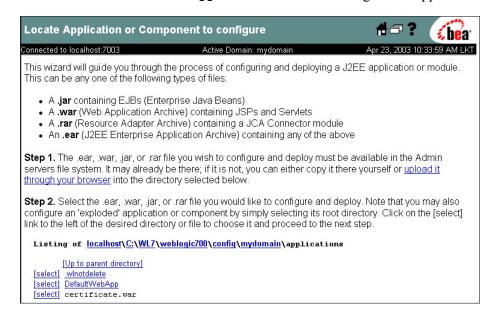


8. Restart the WebLogic server.

To Deploy the eaMarket Web Archive File on WebLogic 7.0

1. Select Mydomain, then Deployments, then Applications.

2. Click Install a new Application. The following screen appears:

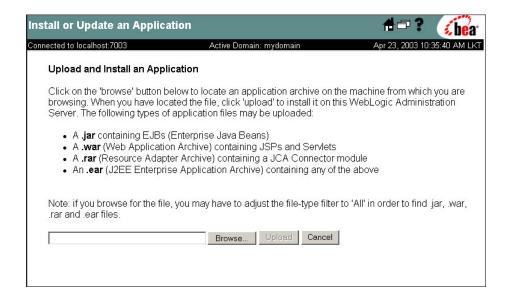


3. Click the upload it through your browser link.



You must copy the .ear file from the eaMarket application server in the <eaMarket_install>\J2EEApps\weblogic directory to the system you are running the browser on in order to locate the .ear file.

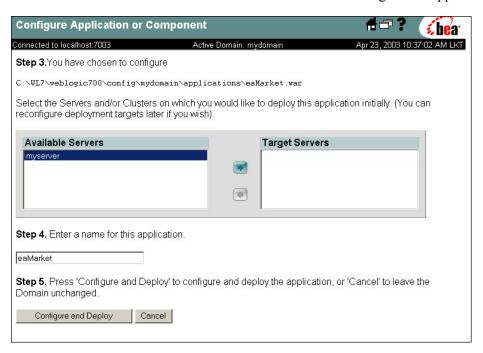
4. The following screen appears:



5. Click **Browse** and go to the < eaMarket Install> \(J2EEApps \) \(weblogic \) folder. Select the eaMarket.war file and click Upload. The previous screen will appear with the eaMarket.war file at the bottom.



6. Click the Select link next to eaMarket.war. The following screen appears:



- 7. Move the eaMarket server (myserver) to the Target Servers column by clicking the arrow.
- 8. Click Configure and Deploy.
- 9. Verify that the Deployments tree has the following eaMarket entries.



10. Restart the WebLogic server.

Post Installation

Starting the Agents

Follow the instructions below to start the agents:

1. Open a command prompt and go to eaMarket installation folder. For example:

```
cd C:\EDCSmkt
```

2. Open the wl_eam_init file and enter the appropriate values for the following environment variables:

```
Given below is an example for WebLogic 6.1:
```

```
SET WL_DOMAIN=C:\bea\wlserver6.1\config\mydomain
SET EAM_HOME=C:\EDCSmkt
SET EAM_DATASOURCE=jdbc\eaMarket
SET PROVIDER_URL= t3://localhost:7001
Given below is an example for WebLogic 7.0:
SET WL_DOMAIN=C:\bea\weblogic700\config\mydomain
SET EAM_HOME=C:\EDCSmkt
SET EAM_DATASOURCE=jdbc\eaMarket
SET PROVIDER URL= t3://localhost:7001
```

3. Save and close the file.

4. Run the wl_eam_init script by typing its name at the command prompt.

Configuring a Data Store for eaMarket

A database must be created for storing content used by eaMarket. Creating an eaMarket Data Store consists of:

- On the database server, you must create a new database login and a new database.
- On the eaMarket server, you must configure a WebLogic JDBC Connection Pool, Data Source and User to connect to that database user and database, and then create a Data Store in eaMarket.

To Create the Database User

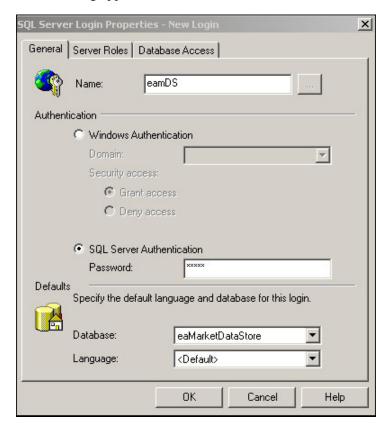
Ask your DBA to create a login and (optionally) a database for eaMarket to store promotional information. The steps for creating a new user and database using the SQL Server Enterprise Manager are given below.

1. Create database by selecting **Databases** under your database server on the tree, and then selecting **Action**, then **New Database** from the menu. A dialog box similar to the following appears:

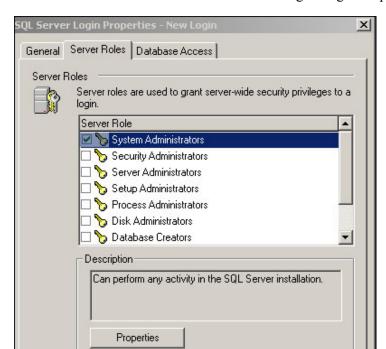


2. Enter a name for the database you plan to use for the eaMarket Data Store.

3. Create a login by selecting **Logins** under **Security** in the tree, and then selecting **Action**, then **New Login**. A dialog box similar to the following appears:



4. Enter the Login name, select **SQL Server Authentication**, enter the password, and choose the database you created in the previous step.



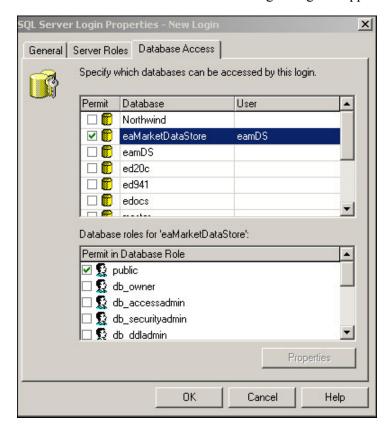
OK

Cancel

5. Click the Server Roles tab. The following dialog box appears:

Help

6. Select the System Administrator server role and then click the Database Access tab. The following dialog box appears:



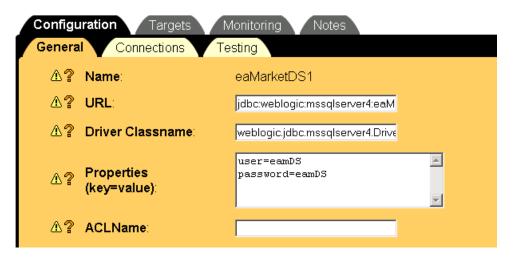
- 7. Select the eaMarket Data Store database. The only database role required is **public**.
- 8. Click ox and the database setup will be completed.

To Configure WebLogic 6.1 for the Data Store

Log on to the WebLogic console, and follow the steps given below.

Configuring the JDBC Connection Pool

1. Select JDBC, then Connection Pools and then click Create a New Connection Pool.

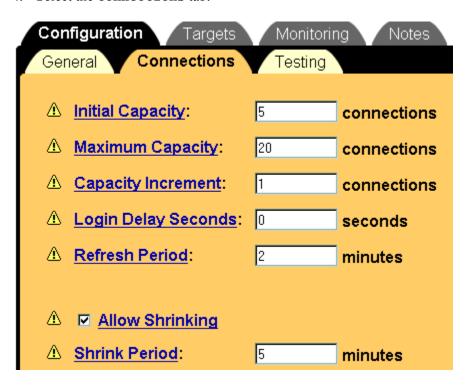


2. Enter the following values:

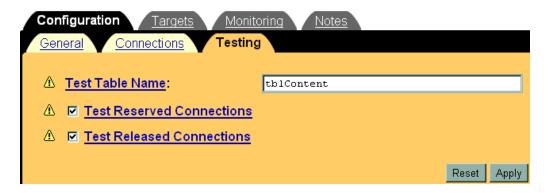
Parameter	Description
Name	Enter a name for the connection to the datastore.
URL	Enter jdbc:weblogic:mssqlserver4: <database name="">@<database name="" server="">:<port>. For example: jdbc:weblogic:mssqlserver4:eaMarketDataStore@eam_demo:1433</port></database></database>

Parameter	Description
Driver Classname	weblogic.jdbc.mssqlserver4.Driver
Properties	user=eamDS password=eamDS
	These should be the same values given when creating the database login used for the Data Store.

- 3. Click Create.
- 4. Select the Connections tab.



5. Enter the values shown in the above image and click Apply. Then click the Testing tab:



- 6. Enter the values shown in the above image, and click Apply.
- 7. Click the Targets tab, and move your eaMarket server (for example, myserver) from the Available to the Chosen column.

Configuring the JDBC Data Source

 Select JDBC, then Data Sources and click Create New JDBC Datasource:



2. Enter the following values:

Parameter	Description
Name	Enter a name for this Data Source. For example: eaMarketDataStore
JNDI Name	jdbc/ <database name="" tablespace="">. For example: jdbc/ds1</database>
Pool Name	Enter the name of the JDBC Connection Pool configured in the previous section. For example: eaMarketDS1

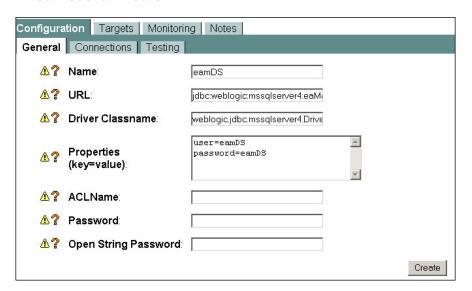
3. Click Create. Then click the Targets tab, and move your eaMarket server (for example, myserver) from the Available to the Chosen column.

To Configure WebLogic 7.0 for the Data Store

Log on to the WebLogic console, and follow the steps given below.

Configuring the JDBC Connection Pool

1. Select JDBC, then Connection Pools and then click Create a New Connection Pool.

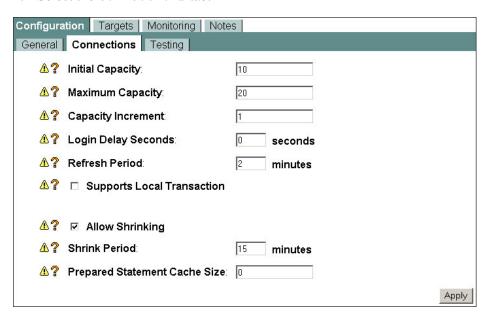


2. Enter the following values:

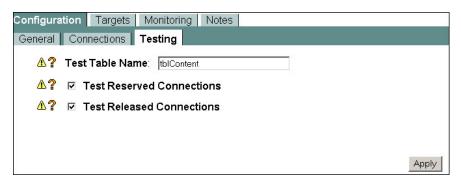
Parameter	Description
Name	Enter a name for the connection to the data store. For example: eamDS.
URL	Enter jdbc:weblogic:mssqlserver4: <database name="">@<database name="" server="">:<port>. For example: jdbc:weblogic:mssqlserver4:eaMarketDataStore@e am_demo:1433</port></database></database>
Driver Classname	weblogic.jdbc.mssqlserver4.Driver
Properties	user=eamDS password= eamDS
	The user and password are the ones you specify when creating the database login used for the Data Store

3. Click Create.

4. Select the Connections tab.



5. Enter the values shown in the above image and click Apply. Then click the Testing tab:



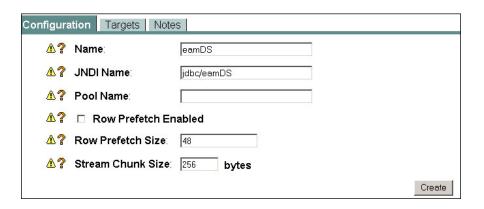
- 6. Enter tblContent for TestTable Name. Select the Test Reserved Connections and Test Released Connections check boxes. Click Apply.
- 7. Click the Targets tab.



8. Move the eaMarket server (myserver) to the Chosen column by clicking the arrow. Click Apply.

Configuring the JDBC Data Source

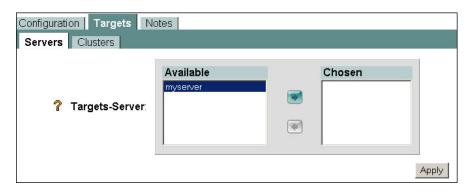
 Select JDBC, then Data Sources and click Create New JDBC Datasource:



2. Enter the following values:

Parameter	Description
Name	Enter a name for this Data Source. For example: eamDS.
JNDI Name	jdbc/ <database name="" tablespace="">. For example: jdbc/eamDS</database>
Pool Name	Enter the name of the JDBC Connection Pool configured in the previous section. For example: eamDS

3. Click Apply. Then click the Targets tab.

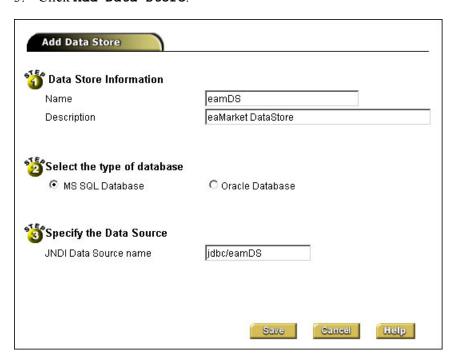


4. Move your eaMarket server (for example, myserver) from the Available to the Chosen column. Click Apply.

To Create a Data Store in eaMarket

This step assumes that eaMarket has been setup on the database and (optionally) eaDirect servers.

- Log in to eaMarket as the Administrator. For example: http://<eaMarket Server>:<weblogic port>/eaMarket
- 2. Select Administration, then Data Stores.
- 3. Click Add Data Store.



4. Enter the following information:

Area/Parameter	Description
Step 1	Enter a unique name, for example eamDS.
Step 2	Select MS SQL Database.

Area/Parameter	Description
Step 3	Specify the JNDI datasource: The JNDI Data Source Name matches the JNDI Name in the JDBC Data Source defined in WebLogic in the previous section.

Setting the Tracking Server

The location of the Tracking server for eaMarket must be configured in the eaMarket configuration page.

- Connect to the eaMarket server giving the URL in the following format: http://<servername>:<port number>/eaMarket
- 2. Login using Administrator as the user and admin as the password.
- 3. Click the Administration tab in the left navigation pane.
- 4. Click on the **eaMarket Preference** button and change the following parameters:
 - In the Server Information section, verify that the name of the server given in the Server Information field is correct.
 - In the Tracker section, for the Tracker option you may need to change the Transfer track summary to the eaMarket server who's URL is to the URL to the eaMarket server.
- 5. Click Save.
- 6. Once the changes are made, stop and start the WebLogic server.

Uninstalling eaMarket

When uninstalling eaMarket, you must remove the application from each server that you installed it on.

To Uninstall the eaMarket application components

- 1. Stop all eaMarket Services using wl eam init script
- 2. From the WebLogic console, undeploy the eaMarket.ear. Delete it through the WebLogic console and manually remove the file from the location to which they were deployed.

Example for WebLogic 6.1: C:\bea\wlserver6.1\config\mydomain\applications

Example for WebLogic 7.0:

C:\bea\weblogic7\wlserver700\config\mydomain\applicat
ions

- 3. Delete the JDBC Connection Pool, JDBC Data Source created for eaMarket
- 4. From Start, then Programs, then eaMarket, run the Uninstall program.

The start menu path may be different, if you chose a different program group when installing eaMarket.

5. The InstallAnywhere wizard guides you through the uninstallation.

To Uninstall eaMarket Database Components

- 1. Go to the < eaMarket installation folder > \Uninstall folder and run the Uninstall eaMarket.exe.
- 2. The InstallAnywhere wizard guides you through the uninstallation.

To Uninstall eaMarket – eaDirect Integration Components

1. Stop all eaMarket Services using the wl eam init script

2. From the WebLogic console, undeploy the *eaMarket.war*. Delete it through the WebLogic console and manually remove the file from the location to which they were deployed.

Example for WebLogic 6.1:

C:\bea\wlserver6.1\config\mydomain\applications

Example for WebLogic 7.0:

- C:\bea\weblogic7\wlserver700\config\mydomain\applicat
 ions
- 3. Go to the < eaMarket installation folder > \Uninstall folder and run the Uninstall eaMarket.exe.
- 4. The InstallAnywhere wizard guides you through the uninstallation.