



BEA WebLogic Adapter for ClarifyCRM®

Installation and Configuration Guide for WebLogic Integration 7.0

Copyright

Copyright © 2002 BEA Systems, Inc. All Rights Reserved.

Copyright © 2002 iWay Software. All Rights Reserved.

Restricted Rights Legend

This software and documentation is subject to and made available only pursuant to the terms of the BEA Systems License Agreement and may be used or copied only in accordance with the terms of that agreement. It is against the law to copy the software except as specifically allowed in the agreement. This document may not, in whole or in part, be copied photocopied, reproduced, translated, or reduced to any electronic medium or machine readable form without prior consent, in writing, from BEA Systems, Inc.

Use, duplication or disclosure by the U.S. Government is subject to restrictions set forth in the BEA Systems License Agreement and in subparagraph (c)(1) of the Commercial Computer Software-Restricted Rights Clause at FAR 52.227-19; subparagraph (c)(1)(ii) of the Rights in Technical Data and Computer Software clause at DFARS 252.227-7013, subparagraph (d) of the Commercial Computer Software--Licensing clause at NASA FAR supplement 16-52.227-86; or their equivalent.

Information in this document is subject to change without notice and does not represent a commitment on the part of BEA Systems. THE SOFTWARE AND DOCUMENTATION ARE PROVIDED “AS IS” WITHOUT WARRANTY OF ANY KIND INCLUDING WITHOUT LIMITATION, ANY WARRANTY OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE. FURTHER, BEA Systems DOES NOT WARRANT, GUARANTEE, OR MAKE ANY REPRESENTATIONS REGARDING THE USE, OR THE RESULTS OF THE USE, OF THE SOFTWARE OR WRITTEN MATERIAL IN TERMS OF CORRECTNESS, ACCURACY, RELIABILITY, OR OTHERWISE.

Trademarks or Service Marks

BEA, Jolt, Tuxedo, and WebLogic are registered trademarks of BEA Systems, Inc. BEA Builder, BEA Campaign Manager for WebLogic, BEA eLink, BEA Manager, BEA WebLogic Commerce Server, BEA WebLogic Enterprise, BEA WebLogic Enterprise Platform, BEA WebLogic Express, BEA WebLogic Integration, BEA WebLogic Personalization Server, BEA WebLogic Platform, BEA WebLogic Portal, BEA WebLogic Server, BEA WebLogic Workshop and How Business Becomes E-Business are trademarks of BEA Systems, Inc.

All other trademarks are the property of their respective companies.

BEA WebLogic Adapter for ClarifyCRM Installation and Configuration Guide for WebLogic Integration 7.0

Part Number	Date	Release
N/A	January 2003	7.0

Table of Contents

About This Document

Audience.....	v
Related Information.....	v
Contact Us!.....	vi
Documentation Conventions	vii

1. Installing the Adapter with WebLogic Integration 7.0

Before Installing the Adapter	1-2
Understanding the Representation of Paths.....	1-2
Step 1. Obtaining the BEA WebLogic Adapter for ClarifyCRM	1-3
Step 2. Configuring the Domain.....	1-4
Step 3. Updating the Environment	1-5
Step 4. Updating the BEA License.....	1-6
Step 5. Deploying the Adapter Using the WebLogic Server Console	1-8
Step 6. Creating or Updating the Adapter Group.....	1-16
Creating the Adapter Group	1-17
Adding the User Name to the Adapter Group.....	1-18
Next Steps.....	1-19



About This Document

This document explains how to install, configure, and deploy the BEA WebLogic Adapter for ClarifyCRM to develop online connections to ClarifyCRM applications using BEA WebLogic Integration 7.0.

This document is organized as follows:

- [Chapter 1, “Installing the Adapter with WebLogic Integration 7.0,”](#) describes how to install the adapter.

Audience

This document is written for system integrators with programming backgrounds and an understanding of ClarifyCRM. Extensive knowledge of ClarifyCRM is not required, but may be helpful in learning about the adapter.

Related Information

The following documents provide additional information for the associated software components:

- *BEA WebLogic Adapter for ClarifyCRM User Guide*
- *BEA WebLogic Adapter for ClarifyCRM Release Notes*

-
- BEA WebLogic Platform installation and user documentation, which is available at the following URL:

<http://edocs.bea.com/platform/docs70/index.html>

Contact Us!

Your feedback on the BEA WebLogic Adapter for ClarifyCRM documentation is important to us. Send us e-mail at docsupport@bea.com if you have questions or comments. Your comments will be reviewed directly by the BEA professionals who create and update the adapter documentation.

In your e-mail message, please indicate which version of the adapter documentation you are using.

If you have any questions about this version of the adapter, or if you have problems installing and running it, contact BEA Customer Support through BEA WebSupport at www.bea.com. You can also contact Customer Support by using the contact information provided on the Customer Support Card, which is included in the product package.

When contacting Customer Support, be prepared to provide the following information:

- Your name, e-mail address, phone number, and fax number
- Your company name and company address
- Your machine type and authorization codes
- The name and version of the adapter you are using
- The version of WebLogic Integration you are using
- A description of the problem and the content of pertinent error messages

Documentation Conventions

The following conventions are used throughout this document.

Convention	Item
boldface text	Indicates terms defined in the glossary.
Ctrl+Tab	Indicates that you must press two or more keys simultaneously.
<i>italics</i>	Indicates emphasis or book titles.
monospace text	<div>Indicates code samples, commands and their options, data structures and their members, data types, directories, and file names and their extensions. Monospace text also indicates text that you must enter from the keyboard.</div> <div><i>Examples:</i></div> <div>#include <iostream.h> void main () the pointer psz chmod u+w * \tux\data\ap .doc tux.doc BITMAP float</div>
monospace boldface text	<div>Identifies significant words in code.</div> <div><i>Example:</i></div> <div>void commit ()</div>
<i>monospace italic text</i>	<div>Identifies variables in code.</div> <div><i>Example:</i></div> <div>String <i>expr</i></div>
UPPERCASE TEXT	<div>Indicates device names, environment variables, and logical operators.</div> <div><i>Examples:</i></div> <div>LPT1 SIGNON OR</div>

Convention	Item
{ }	Indicates a set of choices in a syntax line. The braces themselves should never be typed.
[]	Indicates optional items in a syntax line. The brackets themselves should never be typed. <i>Example:</i> buildobjclient [-v] [-o name] [-f file-list]... [-l file-list]...
	Separates mutually exclusive choices in a syntax line. The symbol itself should never be typed.
...	Indicates one of the following in a command line: <ul style="list-style-type: none">■ That an argument can be repeated several times in a command line■ That the statement omits additional optional arguments■ That you can enter additional parameters, values, or other information The ellipsis itself should never be typed. <i>Example:</i> buildobjclient [-v] [-o name] [-f file-list]... [-l file-list]...
. . . .	Indicates the omission of items from a code example or from a syntax line. The vertical ellipsis itself should never be typed.

1 Installing the Adapter with WebLogic Integration 7.0

This section provides instructions for installing the BEA WebLogic Adapter for ClarifyCRM with WebLogic Integration 7.0. It includes the following topics:

- [Before Installing the Adapter](#)
- [Understanding the Representation of Paths](#)
- [Step 1. Obtaining the BEA WebLogic Adapter for ClarifyCRM](#)
- [Step 2. Configuring the Domain](#)
- [Step 3. Updating the Environment](#)
- [Step 4. Updating the BEA License](#)
- [Step 5. Deploying the Adapter Using the WebLogic Server Console](#)
- [Step 6. Creating or Updating the Adapter Group](#)
- [Next Steps](#)

Before Installing the Adapter

Before you install the BEA WebLogic Adapter for ClarifyCRM, you must review the *BEA WebLogic Adapter for ClarifyCRM Release Notes* to ensure that you have the required prerequisite software installed. The *BEA WebLogic Adapter for ClarifyCRM Release Notes* is available at the following URL:

<http://edocs.bea.com/wlapters/doc70/index.html>

Understanding the Representation of Paths

Because the location of files in the WebLogic Integration environment depends on options selected during installation and configuration, the conventions that follow are used throughout to represent paths.

- *BEA_HOME* represents the BEA Home directory specified for your WebLogic installation.

For example, if you install the product in the default location on a Windows system, *BEA_HOME* represents `c:\bea`.

- *WLI_HOME* represents the root of your WebLogic Integration installation.

For example, if you install WebLogic Integration 7.0 in the default location on a Windows system, *WLI_HOME* represents `c:\bea\weblogic700\integration`.

- *domain* is used to indicate the name of a domain.

In WebLogic Integration 7.0, a new tool, the Configuration Wizard, is used to create custom user domains. When you use the Configuration Wizard to set up the domain configuration stored on the administration server, you are prompted to assign a domain name, *domain*, and to specify the location to which the *domain* directory will be installed. The files required by the administration server are installed in the *domain* directory under the specified location.

For additional information, see *Using the Configuration Wizard* which is available at the following URL:

<http://edocs.bea.com/platform/docs70/configwiz/index.html>

For example, if you accept the Configuration Wizard default location, *BEA_HOME*\user_projects, the files required by the administration server are installed in the following directory:

BEA_HOME\user_projects\domain

- *DOMAIN_HOME* represents the complete path to the root of a domain.

For example, if you use the WebLogic Integration 7.0 Configuration Wizard to create a domain in the default location on a Windows system, *DOMAIN_HOME* represents c:\bea\weblogic700\user_projects\domain.

Note: *WLI_HOME* and *BEA_HOME* (italicized) also represent the corresponding Windows and UNIX environment variables. For example, the literal interpretation of *WLI_HOME* is %WLI_HOME% for Windows and \$WLI_HOME for UNIX.

Unlike *WLI_HOME* and *BEA_HOME*, *DOMAIN_HOME* is not an environment variable that is set by default in the WebLogic Integration environment.

Step 1. Obtaining the BEA WebLogic Adapter for ClarifyCRM

The BEA WebLogic Adapter for ClarifyCRM software is packaged as an EAR file (*BEA_CLARIFY_1_0_70.ear*). You can obtain the software on CD or download it from www.bea.com.

You must also obtain the *samples.zip* file, which contains the tool necessary for generating triggers for ClarifyCRM events. Upon extracting the contents of *samples.zip*, the tool is placed in \DBTriggers directory. Modify the batch file specific to your database and execute. Within the \CreateTables directory, there are SQL scripts specific to your database. Execute these scripts to generate the required tables within your database

Step 2. Configuring the Domain

The adapter can only be deployed in a domain that includes support for application integration functionality. If you have not already done so, use the Configuration Wizard to create the domain and select one of the following domain templates:

- Enterprise application integration (EAI) domain template
- WebLogic Integration (WLI) domain template
- Platform domain template

For the information you need to configure a fully functional domain based on the template, see the appropriate section of the *Configuration Wizard Template Reference*:

- For the EAI domain template, see the following URL:

<http://edocs.bea.com/platform/docs70/template/eaidomain.html>

- For the WLI domain template, see the following URL:

<http://edocs.bea.com/platform/docs70/template/wlidomain.html>

- For the platform domain template, see the following URL:

<http://edocs.bea.com/platform/docs70/template/platjar.html>

For general information about using the Configuration Wizard, see *Using the Configuration Wizard* at the following URL:

<http://edocs.bea.com/platform/docs70/configwiz/index.html>

When you use the Configuration Wizard to create a domain based on the WLI or EAI domain template, a domain-specific version of the Database Wizard is installed in the *DOMAIN_HOME* directory. You must run the Database Wizard for the domain to initialize the database repository with the required tables and system data. For additional information, see “Configuring the Database for a Domain” in *Starting, Stopping and Customizing BEA WebLogic Integration*, at the following URL:

<http://edocs.bea.com/wli/docs70/config/index.htm>

Step 3. Updating the Environment

The BEA WebLogic Adapter for ClarifyCRM relies on JDBC access to the ClarifyCRM database for event processing. Therefore, the appropriate JDBC driver must be installed and set in the classpath. Before you update the server environment, you must obtain the JDBC driver required for your ClarifyCRM database.

If the ClarifyCRM database is stored in MS SQL Server, you can obtain the necessary JDBC driver from the following site:

<http://msdn.microsoft.com/downloads/default.asp>

If the ClarifyCRM database is stored in Oracle, you can obtain the necessary JDBC driver from the following site:

http://otn.oracle.com/software/tech/java/sqlj_jdbc/content.html

After you have obtained the required driver, update your environment as described in the following procedure.

Note: As of the release date, the BEA WebLogic Adapter for ClarifyCRM is only certified for use with Windows operating systems. We are working to certify the adapter on additional platforms. Check the BEA WebLogic Adapters web site at the following URL for updates:

<http://edocs.bea.com/wlapters/docs70/index.html>

To update the server environment on Windows, complete the following steps:

1. Go to the root directory for your domain:

```
cd DOMAIN_HOME
```

Note: You must choose a domain that supports application integration functionality.

2. Locate the `SetDomainTypeData.cmd` file.

Here, *DomainType* is the type of the domain. For example, if your domain is configured to support the development of solutions that employ the full range of WebLogic Integration functionality, it contains the `SetwliDomainData.cmd` file.

1 Installing the Adapter with WebLogic Integration 7.0

3. Update the SVRCP environment variable settings in the `SetDomainTypeData.cmd` file.

Note: The SVRCP environment variable is used in the `SetDomainTypeData` script to set the classpath for the java executable.

After the following line:

```
set SVRCP=%SVRCP%;%PBCOMMONCP%
```

add the following JAR files, according to your database environment:

- For SQL server:

```
set SVRCP=%SVRCP%; "install_path\msbase.jar"
set SVRCP=%SVRCP%; "install_path\mssqlserver.jar"
set SVRCP=%SVRCP%; "install_path\msutil.jar"
set SVRCP=%SVRCP%; "clarify_install_path\javaclasses\ClfyCbo.jar"
```

- For Oracle:

```
set SVRCP=%SVRCP%; "install_path\classes12.zip"
set SVRCP=%SVRCP%; "clarify_install_path\javaclasses\ClfyCbo.jar"
```

Here, `install_path` is the full path to the directory in which you placed the above-listed JDBC driver files for SQL server or the full path to the `classes12.zip` file, and `clarify_install_path` is the path to the root of your ClarifyCRM installation.

4. Add the Clarify `bin` directory to the `PATH` environment variable. For example, add the following statement to the `SetDomainTypeData.cmd` file:

```
set PATH=%PATH%; "clarify_install_path\bin"
```

Step 4. Updating the BEA License

The BEA WebLogic Adapter for ClarifyCRM cannot be used without a valid software license. If you have downloaded the adapter for evaluation, you must obtain an evaluation license as described on the adapter download page. If you have purchased a license for the adapter, the license file is typically sent to you as an e-mail attachment.

When you have obtained a valid license for the adapter, update your `license.bea` file by completing the following steps:

1. Save the license file that you obtained with a name other than `license.bea`, in the `BEA_HOME` directory. For example, save the file as `clarify_adapter_license.bea`. Use this file as the `license_update_file` in step 4 of this procedure.

Warning: Do not overwrite or change the name of the existing `license.bea` file.

2. Change to the `BEA_HOME` directory. For example, on a Windows system, open an MS-DOS session and go to the `BEA_HOME` directory.
3. If it is not already included, add the JDK to your `PATH` variable by executing the command appropriate to your system. For example, on a Windows system:

```
set PATH=BEA_HOME\jdk131_03\bin;%PATH%
```

4. Merge the license update file into your existing license by executing the command appropriate to your system. For example, on a Windows system:

```
UpdateLicense license_update_file
```

Here, `license_update_file` is the name to which you saved the license update file in step 1.

5. Save a copy of your updated `license.bea` file in a safe place outside the WebLogic Integration and application installation directories.

Step 5. Deploying the Adapter Using the WebLogic Server Console

After the BEA WebLogic Adapter for ClarifyCRM is installed, it must be deployed to your domain. To configure and deploy an adapter using the WebLogic Server Administration Console, complete the following steps:

1. Start WebLogic Server.
2. Start the WebLogic Server Administration Console in a browser using the following URL:

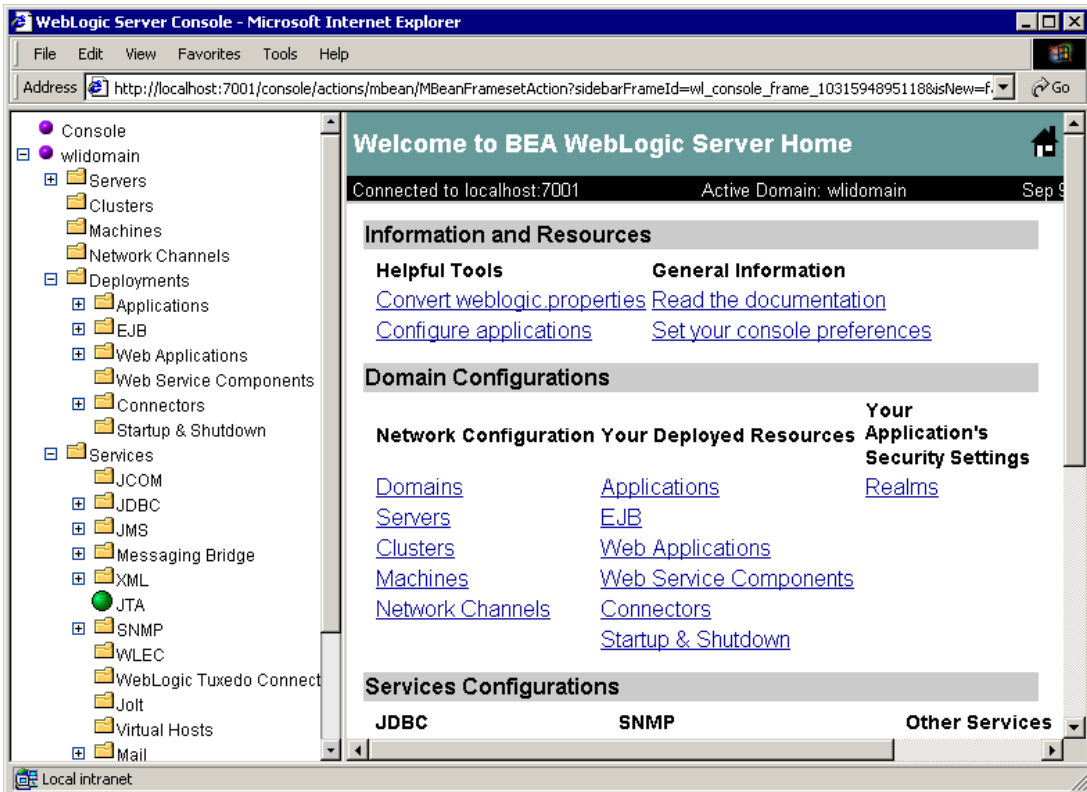
`http://host:port/console/`

Here, *host* represents the machine on which WebLogic Server is running and *port* represents the listening port.

For example, `http://localhost:7001/console/`

3. When prompted, enter the user name and password for the server.
The WebLogic Server Administration Console opens.

Figure 1-1 WebLogic Server Console

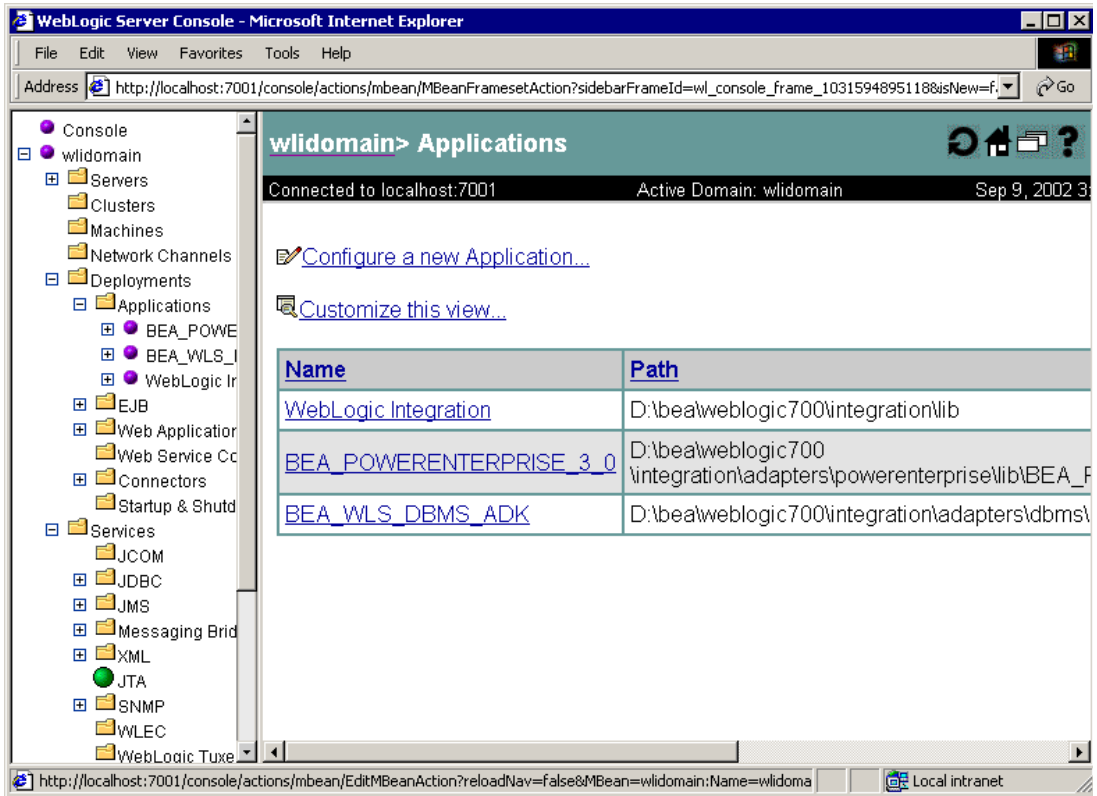


4. In the left pane, choose Deployments and then Applications from the navigation tree.

The console displays the Applications window.

1 *Installing the Adapter with WebLogic Integration 7.0*

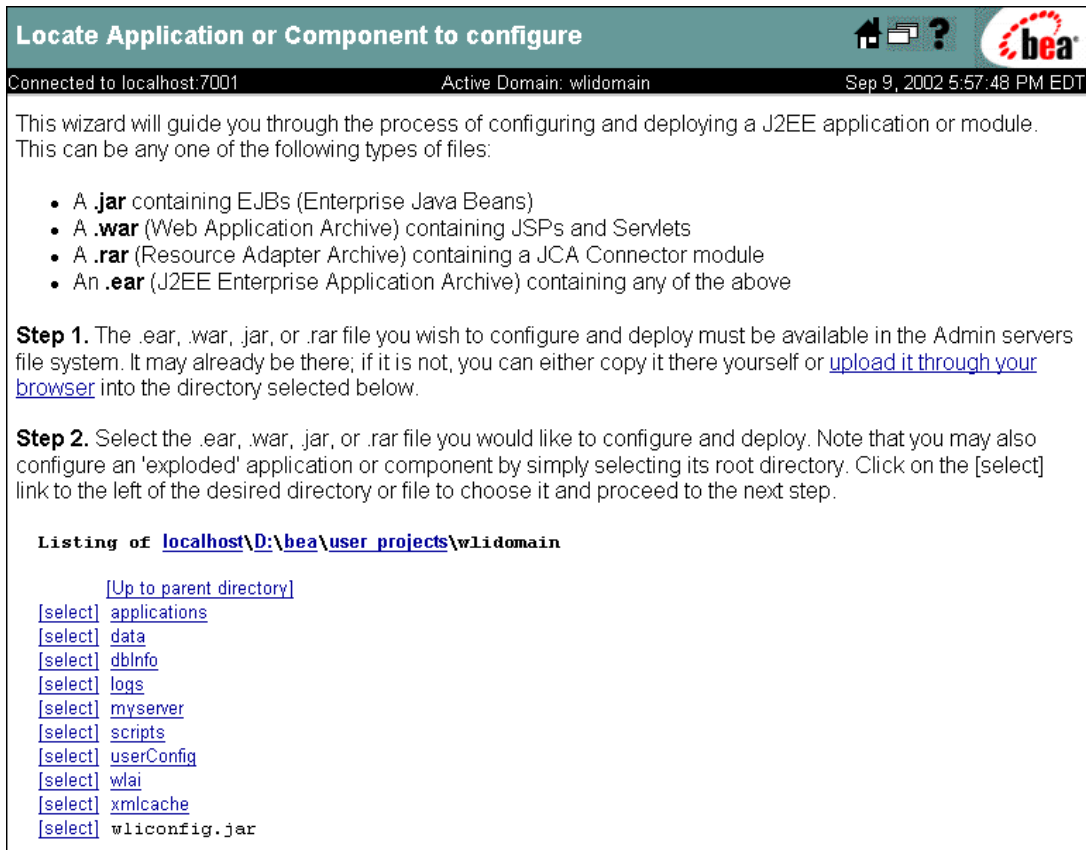
Figure 1-2 Applications Window



5. Click the Configure a new Application link.

The console displays the Locate Application or Component to configure window.

Figure 1-3 Locate Application or Component to Configure Window



6. Do one of the following:

If you copied the `BEA_CLARIFY_1_0_70.ear` file to a directory on the administrative server, navigate to that directory. For example, if you copied the file to the `D:\bea\AdapterEars` directory, select the directory as shown in the following figure.

Figure 1-4 Locating the Adapter EAR File

Listing of [localhost\D:\bea\AdapterEars](#)

[\[Up to parent directory\]](#)
[\[select\]](#) BEA_CLARIFY_1_0_70.ear

If you have not copied the BEA_CLARIFY_1_0_70.ear file to a directory on the administrative server, do the following:

- a. Navigate to the directory to which the file will be uploaded.

For example, to upload the adapter from your local machine to the D:\bea\AdapterEars directory on the administrative server, select the directory as shown in the following figure.

Figure 1-5 Selecting the Target Directory

Listing of [localhost\D:\bea\AdapterEars](#)

[\[Up to parent directory\]](#)

- b. Click the upload it through your browser link to display the Install or Update an Application window.
- c. Click Browse to display the Choose File dialog box.
- d. In the Choose File dialog box, locate the file, and then click Open.

The console displays the selected location.

Figure 1-6 Install or Update an Application Window

Install or Update an Application

Connected to localhost:7001 Active Domain: wldomain Sep 9, 2002 5:01:00 PM EDT

Upload and Install an Application

Click on the 'browse' button below to locate an application archive on the machine from which you are browsing. 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
- A **.rar** (Resource Adapter Archive) containing a JCA Connector module
- An **.ear** (J2EE Enterprise Application Archive) containing any of the above

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

C:\downloads\BEA_CLARIFY_1_0.ear Browse... Upload Cancel

e. Click Upload.

The browser status bar indicates upload progress. When the upload is complete, you are returned to the Locate Application or Component to configure window. The uploaded file now resides in the directory selected in step a.

Figure 1-7 Adapter EAR File Uploaded to Administrative Server

Listing of [localhost\D:\bea\AdapterEars](#)

[\[Up to parent directory\]](#)
[\[select\]](#) BEA_CLARIFY_1_0_70.ear

7. Click the [select] link to the left of the adapter EAR file.

The console displays the Configure Application or Component window.

Figure 1-8 Configure Application or Component Window

Configure Application or Component

Connected to localhost:7001 Active Domain: wlidomain Sep 9, 2002 5:33:42 PM EDT

Step 3. You have chosen to configure

D:\bea\AdapterEars\BEA_CLARIFY_1_0_70.ear

Select the Servers and/or Clusters on which you would like to deploy this application initially.
(You can reconfigure deployment targets later if you wish).

Available Servers		Target Servers
myserver	→	
	←	

Step 4. Enter a name for this application.

BEA_CLARIFY_1_0

Step 5. Press 'Configure and Deploy' to configure and deploy the application, or 'Cancel' to leave the Domain unchanged.

Configure and Deploy Cancel

8. Select the servers or clusters on which to deploy the adapter by using the arrow buttons to move entries from the available list to the target list.

9. You must change the application name from BEA_CLARIFY_1_0_70 to BEA_CLARIFY_1_0.

Note: If you do not change the application name, the adapter will not be available to application views.

Step 5. Deploying the Adapter Using the WebLogic Server Console

The following figure shows a configured application.

Figure 1-9 Configured Application

The screenshot shows the 'Configure Application or Component' dialog in the WebLogic Server Console. The title bar includes a home icon, a question mark, and the BEA logo. The status bar at the top indicates 'Connected to localhost:7001', 'Active Domain: wldomain', and the date/time 'Sep 9, 2002 5:33:42 PM EDT'.

Step 3. You have chosen to configure

D:\bea\AdapterEars\BEA_CLARIFY_1_0_70.ear

Select the Servers and/or Clusters on which you would like to deploy this application initially. (You can reconfigure deployment targets later if you wish).

Available Servers		Target Servers
	→	myserver
	←	

Step 4. Enter a name for this application.

BEA_CLARIFY_1_0

Step 5. Press 'Configure and Deploy' to configure and deploy the application, or 'Cancel' to leave the Domain unchanged.

Configure and Deploy Cancel

10. Click Configure and Deploy.

The console displays the deployment status, which includes a description, status, begin time, and end time for the deployed adapter.

Step 6. Creating or Updating the Adapter Group

Before you create an application view that uses the events or services supported by an adapter, the following requirements must be met:

- The user group, `adapter`, must be defined.
- The administrative server user name must be a member of the `adapter` group.

The action required to complete the configuration depends on which domain template you selected when you created the domain. See the following table for guidelines.

Table 1-1 Configuration Requirements

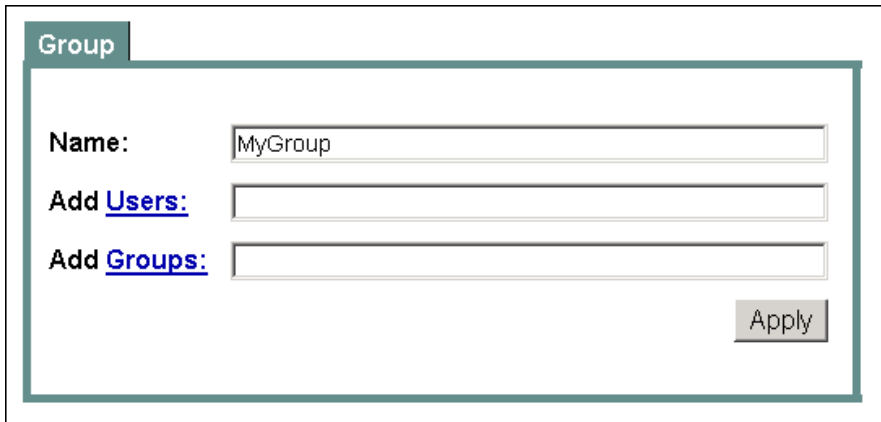
If you created a domain based on the ...	And the administrative server user name is ...	Then ...
Platform domain template	Any value	Create the adapter group and add the administrative user name to it as described in “Creating the Adapter Group” on page 1-17.
WLI or EAI domain template	<code>system</code>	The adapter group is already defined. This group includes the <code>system</code> user name by default. No further configuration is required.
WLI or EAI domain template	A value other than <code>system</code>	The adapter group is already defined. Add the user name to the group as described in “Adding the User Name to the Adapter Group” on page 1-18.

Creating the Adapter Group

To create the adapter group and add the administrative server user name to it, complete the following steps:

1. In the left pane of the WebLogic Server Administration Console, choose Compatibility Security and then Groups from the navigation tree.
2. Click the Create a New Group link to display the Group window.

Figure 1-10 Group Window



The screenshot shows a web form titled "Group". It contains three input fields. The first field is labeled "Name:" and contains the text "MyGroup". The second field is labeled "Add [Users:](#)" and is empty. The third field is labeled "Add [Groups:](#)" and is empty. An "Apply" button is located at the bottom right of the form.

3. Enter adapter in the Name field.
4. Enter the administrative server user name in the Add Users field.
5. Click Apply.

The Group window is updated as shown in the following figure.

Figure 1-11 Group Window

The screenshot shows a web-based form titled "Group". It contains the following elements:

- Name:** A text field containing the value "adapter".
- Members:** A section with the text "(Select to remove)" below it. It contains a checkbox next to the text "username".
- Add [Users](#):** A text input field.
- Add [Groups](#):** A text input field.
- Apply:** A button located at the bottom right of the form.

Adding the User Name to the Adapter Group

To add the administrative server user name to the `adapter` group, complete the following steps:

1. In the left pane of the WebLogic Server Administration Console, choose Compatibility Security and then Groups from the navigation tree.
The console displays the groups currently defined for the domain.
2. Locate and click the link for the `adapter` group to display the group definition.

Figure 1-12 Group Definition

mydomain > Realms > myRealm > Groups

Connected to localhost:7001 Active Domain: mydomain Sep 10, 2002 5:41:32 PM EDT

Group

Name: adapter

Members: (Select to remove)

☐ admin ☐ wlcSamplesUser ☐ joe ☐ wliSystem ☐ hub

☐ system ☐ mary ☐ guest

Add Users:

Add Groups:

Apply

3. If the administrative server user name is not included in the Members list, enter the user name in the Add Users field.
 4. Click Apply to add the user name to the group.
- The name is added to the Members list.

Next Steps

When you have successfully installed and deployed the adapter, you can log on to the WebLogic Integration Application View Console to create application views that employ events and services supported by the BEA WebLogic Adapter for ClarifyCRM. For more information, see the *BEA WebLogic Adapter for ClarifyCRM User Guide*.

1 *Installing the Adapter with WebLogic Integration 7.0*
