

Governance, Risk, and Compliance Controls Suite

Configuration Controls Governor Installation Guide

Software Version 5.1.1

ORACLE®

Configuration Controls Governor Installation Guide

Part No. IA001-7221A

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Start Here

This guide explains how to install Configuration Controls Governor 5.1.1, either for the first time or as an upgrade from Apps 4.6. (Configuration Controls Governor was known previously as Integra Apps, and that earlier name is used throughout the remainder of this manual.)

Broadly speaking, you must perform the following tasks in the order shown:

- 1 Prepare for installation.** See the next three chapters: “Before You Install,” “Prepare the Integra UI Server” and “Integra Installer Worksheet.”
- 2 Install.** See the following chapter: “Install Integra Apps.”
- 3 Configure.** See the final chapter, “Configure the Integra UI Server,” and then the *Integra Apps 5.1.1 Administrator Guide*.
- 4 Use.** See the *Integra Apps 5.1.1 User Guide*.

About this guide

Prerequisites and assumptions

This guide assumes that:

- Your organization has licensed Integra Apps 5.1.1

Intended audience

- Anyone installing Integra Apps
- Those who must plan for, staff, and manage the installation of Integra Apps

Documents about Integra Apps 5.1.1

Release Notes provides a quick overview of the features offered in this release.

Installation Guide gives step-by-step installation instructions.

Administration Guide explains how to configure and administer Integra.

User Guide shows how to perform day-to-day tasks.

Terminology

Systems and Databases

Integra Agent	Integra-installed and owned schema in the ERP instance. Used by Integra components when performing tasks that require access to the instance.
Integra component	Any one of the following: Informia Archive, Informia Subset, Informia Reorg, Informia Data Masking, Integra Apps, Integra Codebase, Integra Access, Integra Transaction, or Integra Forms.
Integra Home instance	Database instance where Integra's components are installed, including the Integra Home schema and component-specific tablespaces. The instance may also contain non- Integra schemas.
Integra Home schema (AMHOME)	Contains all data about your Integra users, security and deployments. Usually named AMHOME.
Integra UI	User interface of Integra's components; i.e., the portion of the components that most users and administrators work with directly.
ERP application	An enterprise-scale application, such as "General Ledger."
ERP application UI	The ERP application's user interface.
ERP instance	Database instance that contains an ERP application's data.
ERP module	Synonymous with ERP application.
ERP system	Joins or integrates your ERP applications.

Using Integra

Definition	Collection of one or more programs and their user-specified parameters.
Job	A sequence of one or more definitions and/or standalone programs scheduled for execution. Future jobs are those whose execution has not begun; current jobs are those being executed now, and past jobs have either been completely executed or terminated.
Occurrence	Generated when a definition is executed. Contains data about the definition's execution, and reports generated by the definition's programs.
Program	A batch of steps or instructions that can be scheduled for execution in a job. Standalone programs can be scheduled independently of other programs (in contrast to the programs that are part of a definition and therefore always scheduled together).

Using Integra Apps

Change Tracker	Displays all changes collected by Change Tracking definitions.
Change Tracking Definition	Apps definition type that monitors changes to ERP application setups.
Change Tracking Alert	Email message that describes changes to ERP application setups. Based on Change Tracking Queries.
Change Tracking Query	Filters the data displayed in the Change Tracker.
Change Tracking Trigger	Installed in the ERP instance by the Change Tracking definition; notes events you specify (inserts, updates, deletes)
Comparison	Report that identifies differences between two Snapshot occurrences.

Displayed Field	Field that is visible to ERP system users.
Field Description	Prompt or label on a field that is visible to ERP system users.
Migration Definition	Apps definition type that moves ERP application setup data from one instance to another.
Non-Displayed Field	Field not visible to ERP system users, but contained in an ERP table.
Object	Group of setup tables to be monitored. Helps you choose the information to be monitored without having to grapple with data model or entity relationships. An Object is typically associated with an ERP application setup form or page.
Snapshot Definition	Apps definition type that reports ERP application setup data.
Template	Determines the data presented in Snapshot occurrences.

Installation

Integra Installer	Platform-independent software for installing Integra components.
Installing computer	Computer where the Integra Installer is run.

Before You Install

This section contains essential information you need to know before installing Integra Apps 5.1.1.

For a successful installation, be sure to follow all recommendations in this section.

System requirements

To successfully install and use Integra Apps 5.1.1, your systems must satisfy the following requirements. Do not attempt installation until they are met.

All requirements below are mandatory, unless otherwise stated. Do not attempt installation until all requirements have been met. Failure to do so will lead to errors and delays.

Installing computer

- One of the following operating systems:

Microsoft Windows

Unix/Linux with X Client

- SQL*Plus and IMP (Oracle Import utility):

Both must be part of the same Oracle client, and stored in the same directory. The Oracle client must satisfy this requirement:

If the Integra Home instance is...	The Installing computer's Oracle client must be...
Oracle 8i database	Oracle 8i (8.1.7.4 or higher)
Oracle 9i database	Oracle 8i (8.1.7.4 or higher) or 9i
Oracle 10g database	Oracle 8i (8.1.7.4 or higher), 9i or 10g

Both must have SQL*Net connectivity to the Integra Home instance (which requires an entry in the Oracle client's **network/admin/tnsnames.ora** file for the Integra Home instance).

Unix/Linux users: You must have **Read** and **Execute** permissions for both.

- Java Runtime Environment **J2SE 1.4.2_05 JRE** or newer (downloadable from <http://java.sun.com/j2se/1.4.2/download.html>).

- **If you are installing onto a Unix/Linux computer:** *Optional, but recommended:* **scp capability** to transfer files from the installing computer to the Integra Home instance. The Integra Installer gives you the option of installing the files manually, but we recommend letting the Installer do it for you.

We recommend that you test the scp capability by using an scp client to transfer a file (of your choice) from the installing computer to the server that hosts the Integra Home instance. Any errors generated by the scp client must be resolved before using the Integra Installer. Work with your system administrator to find resolutions before continuing.

- The file **classes12.jar** or **classes12.zip**, delivered in Oracle's database installation, downloadable from <http://www.oracle.com/technology/software/index.html>.
- **jasperreports-1.2.8.jar**, downloadable from http://downloads.sourceforge.net/jasperreports/jasperreports-1.2.8.jar?modtime=1163544934&big_mirror=0
- **birt-runtime-2_0_1.zip**, downloadable from http://mirrors.ibiblio.org/pub/mirrors/eclipse/birt/downloads/drops/R-R1-2_0_2-200608041826/birt-runtime-2_0_2.zip
- **itext-1.3.jar**, downloadable from http://downloads.sourceforge.net/itext/itext-1.3.jar?modtime=1112806930&big_mirror=0
- **commons-digester-1.7.zip**, downloadable from <http://archive.apache.org/dist/commons/digester/binaries/commons-digester-1.7.zip>
- **hibernate-3.0.5.zip**, downloadable from http://downloads.sourceforge.net/hibernate/hibernate-3.0.5.zip?modtime=1117034763&big_mirror=1
- **jcommon-0.9.5.zip**, downloadable from http://sourceforge.net/project/downloading.php?groupname=jfreechart&filename=jcommon-0.9.5.zip&use_mirror=superb-east
- **jfreechart-0.9.20.zip**, downloadable from http://sourceforge.net/project/downloading.php?group_id=15494&use_mirror=superb-east&filename=jfreechart-0.9.20.zip&63591003

Integra Home instance

Choosing an instance

- The Integra Home instance can be a new or existing database instance. It can contain non- Integra schemas, but we recommend choosing an instance that does not contain ERP schemas.

Platform

- Any platform that supports the required database (specified below), including Oracle Real Application Clusters (RAC).

Software

- Database

Oracle 8i database Enterprise Edition version 8.1.7.4 or higher, with Partitioning option enabled

...or:

Oracle 9i database Enterprise Edition versions 9.2.0.3, 9.2.0.5, 9.2.0.6 or 9.2.0.7, with Partitioning option enabled

9.2.0.4 users: If your ERP instance uses version 9.2.0.4, so must your Integra Home instance, due to a limitation in the Oracle database software. Please contact your Integra consultant.

...or:

Oracle 10g database Enterprise Edition Release 1 or 2, with Partitioning option enabled

- SQL*Plus
- Oracle IMP database utility
- SQL*Net connectivity to each instance managed or used by Integra
- Verify that the following script has been run as SYS to initiate the java virtual machine (Oracle supplies this script):

```
$ORACLE_HOME/javavm/install/initjvm.sql
```

- Verify that the following script has been run as SYS to load the **TCPConnection** java class:

Oracle 8i: \$ORACLE_HOME/rdbms/admin/initpls.j.sql

Oracle 9i: \$ORACLE_HOME/rdbms/admin/utlsmt.p.sql

Oracle 10g: *Not needed; skip this step.*

Database

Once you choose the Integra Home instance, complete the following requirements.

- **Character set:** Verify that your Integra Home instance uses either the **American_America.WE8ISO8859P1** character set, or a character set that is a superset of it (e.g., **UTF8**). The Integra Installer will use Oracle's import utility to import a .dmp file that was created using this character set.

The character set must also be compatible with the set used by the instance's operating system.

- **Disk space:** Verify that you have adequate disk space for these tablespaces:

Tablespace name	Minimum size
<i>Integra tablespaces shared by all components:</i>	
AM_DATA*	2,000 MB
AM_INDEX*	2,000 MB
AM_STAGE*	100 MB
<i>Integra tablespaces used only by Integra Apps:</i>	
APS_DATA*	2,000 MB
APS_INDEX*	1,400 MB
Subtotal 7,500 MB	
<i>Standard database tablespaces used by Integra; can be expected to expand well beyond their minimum sizes:</i>	
RBS (rollback tablespace)	1,000 MB
TEMP (temporary tablespace)	2,000 MB

* The Integra Installer will create these tablespaces, and will create one datafile for each tablespace. If you require more than one datafile per tablespace, create the tablespaces and datafiles before running the Installer. We recommend using the names shown above; in any event, make note of the names you use, because the Installer will ask you for them.

- **Database parameter file:** Set the following values in **INIT.ora**:

Parameter	Value
db_block_size	= 8192
global_names	= FALSE
java_pool_size	Oracle 8i/9i: = 65000000 <i>or greater</i> Oracle 10g: <i>Ignore this parameter</i>
job_queue_processes	= 10
job_queue_interval	Oracle 8i: = 15 Oracle 9i/10g: <i>Ignore this parameter</i>
large_pool_size	Oracle 8i/9i: = 9437184 <i>or greater</i> Oracle 10g: <i>Ignore this parameter</i>
open_cursors	= 500 <i>or greater</i>
open_links	= 10
	If you change this value, you must restart the instance.
optimizer_mode	Oracle 8i/9i: = CHOOSE Oracle 10g: <i>Ignore this parameter</i>
remote_dependencies_mode	= SIGNATURE
shared_pool_size	Oracle 8i/9i: = 31457280 <i>or greater</i> Oracle 10g: <i>Ignore this parameter</i>
utl_file_dir	<i>Contains any directory writeable by Oracle</i>

- SYS and SYSTEM passwords

ERP instance

Each ERP instance that will be configured for use with Integra Apps must meet these requirements:

Platform

- Any platform that supports the required database (specified below), including Oracle Real Application Clusters (RAC).

Software

- One of the following business application systems:
 - Oracle E-Business Suite version 10.7, 11.0.3 or 11i
 - PeopleSoft Enterprise version 8.8
- Database:
 - Oracle 8i database Enterprise Edition version 8.1.7.4 or higher (Partitioning option not required)

...or:

Oracle 9i database Enterprise Edition versions 9.2.0.3, 9.2.0.5, 9.2.0.6 or 9.2.0.7 (Partitioning option not required)

9.2.0.4 users: If your ERP instance uses version 9.2.0.4, so must your Integra Home instance, due to a limitation in the Oracle database software. Please contact your Integra consultant.

...or:

Oracle 10g database Enterprise Edition Releases 1 or 2 (Partitioning option not required)

- SQL*Plus
- Verify that the following script has been run as SYS to initiate the java virtual machine (Oracle supplies this script):

```
$ORACLE_HOME/javavm/install/initjvm.sql
```

- Verify that the following script has been run as SYS to load the **TCPConnection** java class:

Oracle 8i: \$ORACLE_HOME/rdbms/admin/initpls.j.sql

Oracle 9i: \$ORACLE_HOME/rdbms/admin/utlsmtpl.sql

Oracle 10g: Not needed; skip this step.

- **PeopleSoft Enterprise users:** Set the following parameter in the PeopleSoft Enterprise application server's **psappsrv.cfg** file:

Parameter	Value
EnableDBMonitoring	1

Database

- **Disk space:** Verify that you have adequate disk space for these tablespaces, which are created when you configure Integra:

Tablespace name	Minimum size
<i>Integra tablespaces shared by all components:</i>	
AM_AGENT_D	1,000 MB
AM_AGENT_X	1,000 MB
<i>Integra tablespaces used only by Integra Apps:</i>	
APS_AGENT_D	500 MB
APS_AGENT_X	500 MB
Total	3,000 MB

- **If you intend to use Apps' Migration feature:** If you intend to migrate setups between ERP instances that reside on different servers, the destination instance must have an entry in the **TNSNAMES.ora** file of the source instance's Oracle **\$APP_TOP** Home.

- **Unix only: If you intend to use Apps' Migration feature**, and if your **APPL_TOP** is on a different physical server than the ERP database, then the Unix user that owns the ERP database must be able to use the **scp** and **ssh** commands to log into the middle tier. This is necessary so that a Unix user can run **APPSORA.env** to set the appropriate environment variables and run **FNDLOAD** on that environment. The latter user can be – but does not need to be – your **APPLMGR** user.
 - Your middle tier Unix user must have full access to a directory that can be used for storing migration-related files. (The directory is referred to as *destination_directory* in the following step.)
 - Run the following commands as the Oracle database Unix user to test the execution of the **scp** and **ssh** commands:

```
scp filename
   middle_tier_user@server:destination_directory

ssh middle_tier_user@server unix_command
```

...where:

filename is the name of any file on the database tier

middle_tier_user is the Unix user on the middle tier to be used for migration

server is the middle tier server name

destination_directory is the directory on the middle tier that will hold migration files

unix-command is any Unix command (full path may be required)

- **Database parameter file (INIT.ora):** Set the following values in **INIT.ora**:

Parameter	Value
remote_dependencies_mode	SIGNATURE
utl_file_dir	<i>Contains any directory writeable by Oracle</i>
job_queue_processes	10
job_queue_interval	Oracle 8i: 15 Oracle 9i/10g: <i>Ignore this parameter</i>

- SYSTEM password for each ERP instance
- ERP user password for each ERP instance

Integra UI

Server

- One of the following web application servers:

Tomcat 5.x

Oracle Application Server 10g Release 1, 2 or 3. The minimum installation is **Oracle Application Server J2EE and Web Cache**; other 10g components may be installed, but are not needed by Integra.

WebLogic 8.1 SP3 or higher

Tomcat is an appropriate choice if there are no standards for application servers at your site.

- The server may reside on any computer, and may be used to serve other web applications besides Integra. You can use an existing server or create a new one.
- The server must be running on a unique port.
- Java Runtime Environment **J2SE 1.4.2_05 JRE** or higher.
- The font Arial Unicode MS (**ARIALUNI.TTF**), which is used by the Integra UI to generate reports and support non-Roman alphabets. This font can be purchased from Ascender Corporation at <http://ascendercorp.com>

User workstations

- Windows computer with network connection
- Internet Explorer 5.5 or 6.0 with Javascript (a.k.a. "scripting") enabled and popup windows allowed

Integra software prerequisites

To successfully install and use Integra Apps 5.1.1, you must satisfy the following prerequisites. Do not attempt installation until they are met.

Before installing Integra Apps 5.1.1:

- **If you already use Integra Apps:** You must upgrade to Apps 4.6.

After installing Integra Apps 5.1.1:

- **If you already use Integra Apps:** Notify your Integra administrators that the following permission has been added to all existing Security Groups:

Scope	Value
Business Group	All

- **If you use Informia Archive, Informia Subset or Integra Transaction:** You must upgrade each to version 5.1.1 or newer.
- **If you use Integra Access:** You must upgrade to Access 4.5 or newer.
- **If you already use Integra Apps:** There are several significant differences between Apps 5.1.1 and older versions:

To simplify setup and reporting, Apps 5.1.1 allows only one Application in each Snapshot definition. Each Snapshot definition that had more than one Application has been broken into multiple definitions, one per Application.

Apps 5.1.1 has different **roles** than older versions. Each user's roles have been changed as shown here:

Apps 5.1.1 Role		<i>Apps 4.x Role</i>
Apps User	Create and edit Snapshot, Change Tracking, and Migration definitions.	<i>Apps User</i>
Snapshot Scheduler	Schedule Snapshot definitions for execution, and compare Snapshot occurrences.	<i>Apps User</i>
Change Tracking Scheduler	Schedule Change Tracking definitions for execution.	<i>Change Tracking Manager</i>
Migration Scheduler	Schedule Migration definitions for execution.	<i>Migration User</i>
Apps Developer	Create and edit Templates.	<i>Template Builder</i>
Apps Metadata Manager	Use MetaBuilder.	<i>Metabuilder User</i>
	<i>This 4.x role is not converted (all administration is conducted by the Administrator role):</i>	<i>Apps Administrator</i>

Personnel requirements

The following personnel from your organization will be needed during installation:

- Database administrator
- System administrator or technician who knows how to deploy a web application and create a JNDI entry for a database connection (in Tomcat or WebLogic, as appropriate – see “Prepare the Integra UI Server” below)

Prepare the Integra UI Server

If you have already installed other 5.x component(s): Skip ahead to “Integra Installer Worksheet” below.

If you are installing your first 5.x component: The Integra UI is served by a J2EE web application server. You may use any server listed in “System Requirements: Integra UI: Server” above.

The server may reside on any computer, and may be used to serve other web applications besides Integra. You can use an existing server or create a new one:

1 If you will use an existing server:

- a. Confirm that it satisfies all requirements listed in “Before You Install: System Requirements: Integra UI: Server” above.
- b. **Oracle Application Servers only:** You can use an existing OC4J instance or create a new one. If you will not use an existing OC4J instance, create one now.

If you will not use an existing server:

- a. Create one now, using the server manufacturer’s instructions (Tomcat users can also refer to “Appendix: Install Tomcat” below).

The server must satisfy all requirements listed in “Before You Install: System Requirements: Integra UI: Server” above.

- b. Verify that the server is configured to run on a unique port.

2 Verify that the server is operating correctly.

Integra Installer Worksheet

You will use software provided by Oracle – the Integra Installer – to install Integra Apps. The installer will ask you to provide information about the environments that Integra will use.

The following worksheet ensures an easier and more efficient installation by gathering this information now. Record the information you will provide in the space provided.

While using the Integra Installer, use the values you've recorded here. If you use different values, be sure to change the values recorded here. You will need this information for post-installation steps.

The Integra Home Schema stores all data about your Integra users, security and deployments. It must be installed in an existing database. Specify that database here:

Record the value you will use:

Hostname	Hostname of database that will contain the Integra Home Schema
SID (service name)	SID (aka 'service name') of database that will contain the Integra Home Schema
TNS entry	TNS entry on the installing computer (found in the copy of tsnames.ora described in "Before You Install: System requirements: Installing computer" above); usually but not always same as SID
Port	Port number for accessing database that will contain the Integra Home Schema
SYSTEM password	Password of database's SYSTEM user
SYS password	Password of database's SYS user
Database version	Version of database that will contain the Integra Home Schema
Operating system	Operating system of database server that will contain the Integra Home Schema

Enter the following information about the Integra Home Schema:

Record the value you will use:

Home Schema name	Name of Integra Home Schema
Home Schema password	Password of Integra Home Schema
Home Schema already exists (checkbox)	Check if Integra Home Schema is already installed in database specified above

If the Integra Home Schema does not exist yet: Enter the following information about your company or organization:

Record the value you will use:

Company name	Company or Organization name
Temporary tablespace	Name of temporary tablespace used by Integra Home Schema
Create Integra Platform tablespaces (if they were not created already) (checkbox)	Uncheck if Platform tablespaces required by Integra Home Schema have already been created

If “Create Integra Platform tablespaces” was checked above: This installer will create three tablespaces for the Integra Home Schema, and one datafile for each tablespace. Specify their details here:

Record the value you will use:

Data Tablespace name	Name of Data Tablespace (we recommend accepting the default value)	AM_DATA
Data Tablespace size (MB)	Size of Data Tablespace in megabytes	
Data File path and name	Full path and name of Data Tablespace's datafile	
Index Tablespace name	Name of Index Tablespace (we recommend accepting the default value)	AM_INDEX
Index Tablespace size (MB)	Size of Index Tablespace in megabytes	
Index File path and name	Full path and name of Index Tablespace's datafile	
Staging Tablespace name	Name of Staging Tablespace (we recommend accepting the default value)	AM_STAGE
Staging Tablespace size (MB)	Size of Staging Tablespace in megabytes	
Staging File path and name	Full path and name of Staging Tablespace's datafile	

If “Create Integra Platform tablespaces” was NOT checked above: The Integra Home Schema requires the following tablespaces:

Record the value you will use:

Data Tablespace name	Name of the Data Tablespace
Index Tablespace name	Name of the Index Tablespace
Staging Tablespace name	Name of the Staging Tablespace

Enter the following information about the database that contains the Integra Home Schema:

Record the value you will use:

ORACLE_HOME directory	Full pathname of database's ORACLE_HOME directory
UTL_FILE_DIR directory	Full pathname of database's UTL_FILE_DIR directory

If the Integra Home database's operating system (specified above) is Unix: The installer copies files to your database's UTL_FILE_DIR directory. Enter the following information or check the 'Copy files manually' checkbox:

Record the value you will use:

Login user	OS username of the database server
Login password	OS password of the database server
Copy files manually (checkbox)	Check if you want to manually copy the files to the UTL_FILE_DIR directory

If the Integra Home database's operating system (specified above) is Windows: The installer copies files to your database's UTL_FILE_DIR directory. Enter the following information or check the 'Copy files manually' checkbox:

Record the value you will use:

UTL_FILE_DIR directory	Mapped network drive and path of the database's UTL_FILE_DIR directory
-------------------------------	--

Copy files manually (checkbox)	Check if you want to manually copy the files
---------------------------------------	--

The product you are installing uses a web server. The server does not need to be dedicated to Integra. Enter the following information:

Record the value you will use:

Install directory	Directory where Integra's web assets will be installed
--------------------------	--

Web app name	Name of the Integra web application (we recommend accepting the default value)	integra
---------------------	--	---------

Datasource name	JNDI entry for the connection to the Integra Home Schema (we recommend accepting the default value)	jdbc/amhome
------------------------	---	-------------

Enter the following information about the installing computer:

Record the value you will use:

Oracle bin directory	Directory where Oracle executables (e.g., sqlplus, imp) have been installed on this computer
-----------------------------	--

Database version	Database version of Oracle executables specified above
-------------------------	--

OS bin directory	Directory where common OS executables are stored (e.g., cmd (Windows), chmod (Unix))
-------------------------	---

If you are installing Integra Apps for the first time: The Integra Home Schema requires several tablespaces dedicated to Integra Apps. Uncheck the box below if those tablespaces already exist:

Record the value you will use:

Create Integra Apps tablespaces (checkbox)

If "Create Integra Apps tablespaces" was checked above: This installer will create two tablespaces for Integra Apps, and one datafile for each tablespace. Specify their details here:

Record the value you will use:

Data Tablespace name	Name of Data Tablespace (we recommend accepting the default value)	APS_DATA
Data Tablespace size (MB)	Size of Data Tablespace in megabytes	
Data File path and name	Full path and name of Data Tablespace's datafile	
Index Tablespace name	Name of Index Tablespace (we recommend accepting the default value)	APS_INDEX
Index Tablespace size (MB)	Size of Index Tablespace in megabytes	
Index File path and name	Full path and name of Index Tablespace's datafile	

If “Create Integra Apps tablespaces” was NOT checked above: Integra Apps requires the following tablespaces:

Record the value you will use:

Data Tablespace name	Name of the Data Tablespace
---------------------------------	--------------------------------

Index Tablespace name	Name of the Index Tablespace
----------------------------------	---------------------------------

Install Integra Apps

- 1 Ensure that you have satisfied all requirements and prerequisites described above, and completed the Integra Installer Worksheet (also above).
- 2 Obtain Integra Apps 5.1.1 (**apps-511-install.zip**) and all other required Integra software from Oracle.
- 3 Prepare **apps-511-install.zip** for installation:
 - a. Create the directory **integra** at the root level on the installing computer, if it does not exist already.
 - b. Place **apps-511-install.zip** in the **integra** directory.
 - c. Unzip **apps-511-install.zip**. The subdirectory **apps-511-install** is created.
 - d. Inside the **apps-511-install** directory, there will be a directory named **lib_stage**. Move the following files (downloaded earlier; see page qq) into **lib_stage**:
 - jasperreports=1.2.8.jar**
 - birt-runtime-2_0_1.zip**
 - itext-1.3.jar**
 - commons-digester-1.7.zip**
 - hibernate-3.0.5.zip**
 - jcommon-0.9.5.zip**
 - jfreechart-0.9.20.zip**
 - e. Run the following script in the **apps-511-install** directory:
 - Unix/Linux users: preinstall.sh**
 - Windows users: preinstall.bat**
- 4 Close all command shell windows.
- 5 Open a new command shell window. (In Windows XP, click **Start** and select **Run...**; enter `cmd` in the **Open** field; click **OK**.)

6 Set the following environment variables temporarily on the installing computer:

ORACLE_HOME Full path to the Oracle client described in “Before You Install: System requirements: Installing computer” above. For example,
`set ORACLE_HOME=c:\oracle\oradbs8i`

JAVA_HOME Full path to the Java Runtime Environment described in “Before You Install: System requirements: Installing computer” above. For example,
`set JAVA_HOME=c:\Program Files\Java\j2re1.4.2_05`

CLASSPATH Prepend the full path to the **lib** directory of the Java Runtime Environment described above. For example,
`set CLASSPATH=%JAVA_HOME%\lib;%CLASSPATH%`

NLS_LANG *If the Integra Home instance uses a character set other than American_America.WE8ISO8859P1:* This variable must *not* be set. Unix/Linux users should issue the command:

```
unset NLS_LANG
```

...and Windows users should issue the command:

```
set NLS_LANG=
```

7 Verify the installing computer’s connection to the Integra Home instance by entering this command:

```
tnsping TNS-entry
```

...where:

TNS-entry is the value you specified in the Integra Installer Worksheet above, on the page beginning “The Integra Home Schema stores all data about your Integra users, security and deployments.”

If the command returns any error messages, you must resolve them before continuing; work with your system administrator to find resolutions.

8 *If you have already installed other 5.x component(s):*

- a. Ask all users to log out of all Integra products.
- b. Stop the Integra web application.

- 9 **If you use Integra Apps 4.x:** Remove Integra Apps from each ERP instance, using the Deployment Workbench (navigate to **Instance Configuration: Deployment Workbench** from the Administrator Role).
- 10 Go to the **apps-511-install** directory.
- 11 Launch the Integra Installer by issuing the command appropriate for the installing computer's operating system:

Operating system	Issue this command
Unix/Linux	<code>install.sh options -f path</code>
Windows	<code>install options -f path</code>

...where *path* is `apps-511-install.apf`

...and *options* are:

-a	Runs the installer in analyze mode, which checks the destination environment without installing.
-c	Logs to the console as well as a log file.
-d <i>level</i>	Sets the debug level. <i>level</i> is a value between 0 and 5. There is no space between "d" and <i>level</i> ; e.g., <code>d1</code>
-f <i>path</i>	Shown in the examples above. Used to specify the <i>path</i> to the package to be installed.
-h	Displays a list of all flags.
-l	Lists the components in the package specified with the <code>-f</code> option.
-p	Stores all information entered by the user in a file for reuse in subsequent runs. The file is stored on the Integra Home instance, and can contain sensitive password information. To use this file in a subsequent run, use the same flag.
-x	Causes the installer to delete the file created by the <code>-p</code> option upon quitting installation.

For example: `install.sh -f apps-511-install.apf`

- 12 Follow the Installer's step-by-step instructions.

While using the Integra Installer, you were presented with a **Copy files manually** checkbox on the page beginning "The installer copies files to your database's UTL_FILE_DIR directory." Refer to the Integra Installer Worksheet above to find the value you entered.

If you checked Copy files manually, copy the files now:

- a. Connect to the *Install directory* (see above).
 - b. Copy the contents of the **utl_file_dir** directory to the Integra Home instance's UTL_FILE_DIR.
- 13 Keep the **integra/apps-511-install** directory; you will use its contents later to install additional software needed by Integra Apps 5.1.1.
 - 14 Proceed to the next section, "Configure the Integra UI Server."

Configure the Integra UI Server

This section contains three sets of instructions:

- Tomcat
- Oracle Application Server (OAS)
- WebLogic

Tomcat

- 1 **If you are installing your first 5.x component:** Create a new directory named **web-application-name** anywhere on the Integra UI server's machine, where:

- **web-application-name** is the web application name you specified in the Integra Installer.

- 2 **All users:** While using the Installer, you specified an **Install directory** on the page beginning "The product you are installing uses a web server." Refer to the Integra Installer Worksheet above to find the value you entered. Inside that directory, you'll find a directory named **am_web_ui**.

- **If you are installing your first 5.x component:** Copy the **am_web_ui** directory to the **web-application-name** directory that you made in Step 1.
- **If you have already installed other 5.x component(s):** Copy the *files* in the **am_web_ui** directory to the Integra UI server's **web-application-name/am_web_ui** directory, replacing existing files if necessary. Do the same for all subdirectories of **am_web_ui**.

- 3 **All users:** On the machine where the Integra UI server resides, explode (or unzip) each **.war** file found in **web-application-name/am_web_ui** and its subdirectories.

Delete all copies of each **.war** file after exploding (or unzipping) it.

- 4 Install all other software downloaded earlier, following the instructions that accompany the software.

At minimum, **now install all items that were marked Required, in the order indicated** on the download page.

- 5 **If you have already installed other 5.x component(s):** Restart the Integra web application. Then proceed to the *Administration Guide* to configure this component.

If you are installing your first 5.x component: Complete the following steps.

- 6 Copy the file **classes12.jar** (which can be found on the installing computer) to the directory **\$CATALINA_HOME/common/lib**
- 7 Use Tomcat's administration tools to deploy a new web application, using:
 - The context name **web-application-name**.
 - The new directory as the deploy directory.

8 Copy the file ***web-application-name/config/integra.xml*** to the **`$CATALINA_HOME/conf/catalina/localhost`** directory, renaming it ***web-application-name.xml***

9 Edit the new file:

Replace:	...with:
@webserver .contextname@	<i>web-application-name</i>
@webserver .deploy.path@	Full path to the <i>web-application-name</i> directory you created above
@database.amhome .jndiname@	JNDI Name you specified in the Integra Installer
@database.amhome .password@	Password of the Integra Home schema
@database.amhome .username@	Username of the Integra Home schema
@database .amhome.url@	<p><code>jdbc:oracle:thin:@hostname:port:SID</code></p> <p>...where:</p> <p><i>hostname</i> is the domain name of the Integra Home instance's host (e.g., <code>localhost</code> or <code>amhome.mydomain.com</code>)</p> <p><i>port</i> is the Integra Home instance's port</p> <p><i>SID</i> is the Integra Home Instance's SID</p>

10 Edit the file ***web-application-name/config/amhome.conf***:

Replace:	...with:
@webserver.type@	tomcat
@database.amhome .jndiname@	JNDI Name you specified in the Integra Installer

11 Edit the file *web-application-name/config/quartz.properties*:

Replace:	...with:
@database.amhome .url@	jdbc:oracle:thin:@hostname:port:SID ...where: hostname is the domain name of the Integra Home instance's host (e.g., localhost or amhome.mydomain.com) port is the Integra Home instance's port SID is the Integra Home Instance's SID
@database.amhome .username@	Username of the Integra Home schema
@database.amhome .password@	Password of the Integra Home schema

12 *Unix/Linux users:* Add the following two lines just below the initial comments in the file *startup.sh* (enter the entire `CATALINA_OPTS=" . . .` statement on a single line):

```
CATALINA_OPTS="-Djava.awt.headless=true
-Djava.security.auth.login.config=web-application-path/
WEB-INF/jaas.config -XmsInitial -XmxMaximum"

export CATALINA_OPTS
```

...where:

web-application-path is the full pathname of the directory you created above.

Initial and *Maximum* set the Initial Memory Pool and Maximum Memory Pool:

	Required size	Example
Initial Memory Pool	256MB or greater	-Xms256M
Maximum Memory Pool	768MB or greater	-Xmx768M

13 *Windows users:*

- a. In Windows, select **Start > Configure Tomcat**
- b. Select the **Java** tab.

c. Add the following lines under **Java Options**:

```
-Djava.awt.headless=true

-Djava.security.auth.login.config=web-application-path\
WEB-INF\jaas.config
```

...where:

web-application-path is the full pathname of the directory you created above

d. Verify that the **Initial Memory Pool** and **Maximum Memory Pool** settings meet these requirements:

Initial Memory Pool 256MB or greater

Maximum Memory Pool 768MB or greater

14 Copy the file **ARIALUNI.TTF** to the ***web-application-name*/WEB-INF/classes** directory. For information on this file, see "Before You Install: System Requirements: Integra UI" above.

15 If the directory ***web-application-name*/WEB-INF/fonts** contains one or more *.**ttf** files, copy them to:

Unix/Linux users: /usr/local/amfonts
(create this directory if it does not already exist)

Windows users: C:\WINDOWS\Fonts

16 **If the Integra UI server does not have Internet access:** Edit the file ***web-application-name*/WEB-INF/classes/resources/AMResources.properties**, and set the properties **banner0**, **banner1** and **banner2** to:

```
http://server-name:port/web-application-name/jsp/amblank.jsp
```

...where:

server-name is the domain name of your Integra UI server

port is the port Integra normally accesses on the UI server

web-application-name is the name you specified in the Integra Installer

- 17 If the following files exist in the ***web-application-name/WEB-INF/lib*** directory, delete them:

jasperreports-0.6.1.jar

itext-1.02b.jar

itext-1.4.jar

- 18 Restart the Tomcat web server.

Configure Apps 5.1.1

You have configured the Integra UI server. Proceed to the *Integra Apps 5.1.1 Administration Guide* and configure Apps 5.1.1.

Oracle Application Server (OAS)

While using the Installer, you specified an **Install directory** on the page beginning “The product you are installing uses a web server.” Refer to the Integra Installer Worksheet above to find the value you entered. The steps below refer to this directory.

1 *If you are installing your first 5.x component:*

- a. Log into the Oracle Enterprise Manager.
- b. Select the OC4J instance that will serve the Integra web application.
- c. Click the **Applications** tab.
- d. Select **Deploy WAR file**.
- e. On the **Deploy Web Application** page, enter the following information:

Web Application	The path to the file am.war am.war is in the directory <i>Install directory/am_web_ui/</i>
Application Name	<i>web-application-name</i> (the web application name you specified in the Integra Installer). Example: <i>integra</i>
Map to URL	<i>/web-application-name</i> Example: <i>/integra</i>

- f. Click **Deploy**.

- 2 **All users:** Explode (or unzip) the file *com.war*, where *com* is a three-letter acronym for the component you are installing:

Informia Archive	arc
Informia Subset	sub
Integra Access	acc
Integra Apps	aps
Integra Transaction	trx

The file is found in the directory *Install directory/com/com_web_ui/* (e.g., *Install directory/arc/arc_web_ui/arc.war*)

- 3 Delete all copies of the **.war** files used in the preceding steps.
- 4 Install all other software downloaded earlier, following the instructions that accompany the software.

At minimum, **now install all items that were marked Required, in the order indicated** on the download page.

- 5 **If you have already installed other 5.x component(s):** Restart the Integra web application. Then proceed to the *Administration Guide* to configure this component.

If you are installing your first 5.x component: Complete the following steps.

In these steps, **web-app-path** is the path to the directory containing the Integra web application's files. This is typically **OAS-home-directory/j2ee/OC4J-instance-name/web-application-name/web-application-name**

- 6 Verify that OAS's **Initial Memory Pool** and **Maximum Memory Pool** settings meet these requirements:

Initial Memory Pool 256MB or greater

Maximum Memory Pool 768MB or greater

You can do this on the Oracle Enterprise Manager's **Server Properties** page by ensuring that the **Java Options** field contains these arguments:

```
-XmsInitial -XmxMaximum
```

...where:

Initial and *Maximum* set the Initial Memory Pool and Maximum Memory Pool:

	Required size	Example
Initial Memory Pool	256MB or greater	-Xms256M
Maximum Memory Pool	768MB or greater	-Xmx768M

- 7 Edit the file ***web-app-path/config/amhome.conf***:

Replace:

...with:

@webserver.type@

oas

@database.amhome.jndiname@

JNDI Name you specified in the Integra Installer

8 Edit the file ***web-app-path/config/quartz.properties***:

Replace:	...with:
@database.amhome .url@	jdbc:oracle:thin:@ <i>hostname</i> : <i>port</i> : <i>SID</i> ...where: <i>hostname</i> is the domain name of the Integra Home instance's host (e.g., localhost or amhome.mydomain.com) <i>port</i> is the Integra Home instance's port <i>SID</i> is the Integra Home Instance's SID
@database.amhome .username@	Username of the Integra Home schema
@database.amhome .password@	Password of the Integra Home schema

9 Copy the following lines from ***web-app-path/config/jazn-data.xml*** to ***OAS-home-directory/j2ee/OC4J-instance-name/config/jazn-data.xml***, below the **<jazn-login-config>** element:

```
<application>
  <name>RDBMSConfiguration</name>
  <login-modules>
    <login-module>
      <class>com.applimation
```

```

.amplatform.security.AMRdbmsLoginModule</class>
  <control-flag>required</control-flag>
  <options>
    <option>
      <name>debug</name>
      <value>true</value>
    </option>
  </options>
</login-module>
</login-modules>
</application>
<application>
  <name>LDAPConfiguration</name>
  <login-modules>
    <login-module>
<class>com.applimation.amplatform.security.AMLdapLoginModule</
class>
  <control-flag>required</control-flag>
  <options>
    <option>
      <name>debug</name>
      <value>true</value>
    </option>
  </options>
</login-module>
</login-modules>
</application>

```

- 10 OAS 10gAS users:** Change this line in ***OAS-home-directory/j2ee/OC4J-instance-name/config/jazn.xml*** (near the top of the file):

```
<jazn provider="XML" location="./jazn-data.xml" />
```

...to:

```
<jazn provider="XML" location="OAS-home-directory/j2ee/OC4J-
instance-name/applications/web-application-
name/applimation/config/jazn-data.xml" />
```

- 11** Return to the Oracle Enterprise Manager.
- 12** Select the same OC4J instance as earlier.
- 13** Click the **Applications** tab.
- 14** Click the name of the application you created above.
- 15** From the Resources menu, select **Data Sources**.

16 Click **Create**.

17 On the **Create Data Source** page, enter the following information:

Name	<code>jdbc/web-application-name</code>
Data Source Class	<code>com.evermind.sql.DriverManagerDataSource</code>
JDBC URL	<code>jdbc:oracle:thin:@hostname:port:SID</code> ...where: <i>hostname</i> is the domain name of the Integra Home instance's host (e.g., localhost or amhome.mydomain.com) <i>port</i> is the Integra Home instance's port <i>SID</i> is the Integra Home Instance's SID
JDBC Driver	<code>oracle.jdbc.driver.OracleDriver</code>
Username	Username of the Integra Home schema.
Use Cleartext Password	Checked.
Password	Password of the Integra Home schema.
Location	<code>jdbc/web-application-name</code>
Transactional (XA) Location	<code>jdbc/xa/web-application-name</code>
EJB Location	<code>jdbc/web-application-name</code>

18 Click **Apply**.

19 Copy the file **ARIALUNI.TTF** to the **web-app-path/WEB-INF/classes** directory. For information on this file, see "Before You Install: System Requirements: Integra UI" above.

20 If the directory **web-app-path/WEB-INF/fonts** contains one or more ***.ttf** files, copy them to:

Unix/Linux users: `/usr/local/amfonts`
 (create this directory if it does not already exist)

Windows users: `C:\WINDOWS\Fonts`

- 21** Edit the file *OAS-home-directory/opmn/conf/opmn.xml*, find `<ias-component id="OC4J">`, and add the following line below `<category id="start-parameters">`:

```
<data id="oc4j-options" value="-userThreads"/>
```

OAS 10gAS users: Also add the following line:

```
<data id="java-options" value="-server -
Djava.security.policy=$ORACLE_HOME/j2ee/home/config/java2.poli
cy -Djava.awt.headless=true -Dhttp.webdir.enable=false -
Xms1024M -Xmx1024M"/>
```

- 22 OAS 10gAS users:** In ASC console > Members: home > Administration > Thread Pool Configuration > Application Server Thread Pool, enter the following values:

Minimum Pool Size	5
Keep Alive Duration	10

- 23 OAS 10gAS users:** In ASC console > Applications > integra > Administration > JDBC Resources > Connections Pools: amhome > Attributes, enter the following values:

Initial size of Connection Cache	5
Minimum Number of Connections	5
Maximum Number of Statements Cached	200
Inactivity Timeout (seconds)	300

- 24 OAS 10gAS users:** In ASC console > Members: home > Administration > Logger Configuration > Root Logger: INFO > Apply, enter the following value:

Logging Levels	INFO
-----------------------	------

- 25** *If the Integra UI server does not have Internet access:* Edit the file ***web-application-name/WEB-INF/classes/resources/AMResources.properties***, and set the properties **banner0**, **banner1** and **banner2** to:

```
http://server-name:port/web-application-name/jsp/amblank.jsp
```

...where:

server-name is the domain name of your Integra UI server

port is the port Integra normally accesses on the UI server

web-application-name is the name you specified in the Integra Installer

- 26** Restart the OC4J instance.

Configure Apps 5.1.1

You have configured the Integra UI server. Proceed to the *Integra Apps 5.1.1 Administration Guide* and configure Apps 5.1.1.

WebLogic

- 1 **If you are installing your first 5.x component:** Create a new directory named **web-application-name** anywhere on the Integra UI server's machine, where:
 - **web-application-name** is the web application name you specified in the Integra Installer
- 2 **All users:** While using the Installer, you specified an **Install directory** on the page beginning "The product you are installing uses a web server." Refer to the Integra Installer Worksheet above to find the value you entered. Inside that directory, you'll find a directory named **am_web_ui**.
 - **If you are installing your first 5.x component:** Copy the **am_web_ui** directory to the **web-application-name** directory that you made in Step 1.
 - **If you have already installed other 5.x component(s):** Copy the *files* in the **am_web_ui** directory to the Integra UI server's **web-application-name/am_web_ui** directory, replacing existing files if necessary. Do the same for all subdirectories of **am_web_ui**.
- 3 **All users:** On the machine where the Integra UI server resides, explode (or unzip) each **.war** file found in **web-application-name/am_web_ui** and its subdirectories.

Delete all copies of each **.war** file after exploding (or unzipping) it.
- 4 Install all other software downloaded earlier, following the instructions that accompany the software.

At minimum, **now install all items that were marked Required, in the order indicated** on the download page.

- 5 **If you have already installed other 5.x component(s):** Restart the Integra web application. Then proceed to the *Administration Guide* to configure this component.

If you are installing your first 5.x component: Complete the following steps.
- 6 Copy the file **classes12.jar** (which can be found on the installing computer) to the directory **\$WEBLOGIC_HOME/weblogic81/common/lib**

- 7 Verify that WebLogic's **Initial Memory Pool** and **Maximum Memory Pool** settings meet these requirements:

Initial Memory Pool 256MB or greater

Maximum Memory Pool 768MB or greater

- 8 Use the WebLogic Console to deploy a new web application, using:
- The context name ***web-application-name***.
 - The new directory as the deploy directory.
- 9 Use the WebLogic Console to create a Connection Pool for the new web application's domain that:
- Connects to the Integra Home schema
 - Has a maximum capacity of at least 15 connections
 - The name **am_connection_pool** is recommended.
- 10 Use the WebLogic Console to create a Datasource entry in the new Connection Pool that:
- Connects to your Integra Home schema
 - Uses the JNDI Name you specified in the Integra Installer

- 11 Edit the file ***web-application-name/config/amhome.conf***:

Replace:	...with:
@webserver.type@	weblogic
@database.amhome.jndiname@	JNDI Name you specified in the Integra Installer

12 Edit the file *web-application-name/config/quartz.properties*:

Replace:	...with:
@database.amhome .url@	jdbc:oracle:thin:@hostname:port:SID ...where: hostname is the domain name of the Integra Home instance's host (e.g., localhost or amhome.mydomain.com) port is the Integra Home instance's port SID is the Integra Home Instance's SID
@database.amhome .username@	Username of the Integra Home schema
@database.amhome .password@	Password of the Integra Home schema

13 Unix/Linux users: In the file *startup.sh*, find the line that starts the WebLogic server. The line begins with **\$JAVA_HOME/bin/java** and ends with **weblogic.Server**.

Insert the following text into that line, just before **weblogic.Server**:

```
-Djava.awt.headless=true
-Djava.security.auth.login.config=web-application-path/
WEB-INF/jaas.config -XmsInitial -XmxMaximum
```

...where:

web-application-path is the full pathname of the directory you created above

Initial and *Maximum* set the Initial Memory Pool and Maximum Memory Pool:

	Required size	Example
Initial Memory Pool	256MB or greater	-Xms256M
Maximum Memory Pool	768MB or greater	-Xmx768M

14 Windows users:

- a. In the file **startWeblogic.cmd**, find the line that starts the WebLogic server. The line begins with **%JAVA_HOME%\bin\java** and ends with **weblogic.Server**.
- b. Insert the following text into that line, just before **weblogic.Server**:

```
-Djava.awt.headless=true
-Djava.security.auth.login.config=web-application-path\
WEB-INF\jaas.config
```

...where:

web-application-path is the full pathname of the **web-application-name** directory

- 15** Copy the file **ARIALUNI.TTF** to the **web-application-name/WEB-INF/classes** directory. For information on this file, see "Before You Install: System Requirements: Integra UI" above.
- 16** If the directory **web-application-name/WEB-INF/fonts** contains one or more ***.ttf** files, copy them to:

Unix/Linux users: `/usr/local/amfonts`
(create this directory if it does not already exist)

Windows users: `C:\WINDOWS\Fonts`

- 17** **If the Integra UI server does not have Internet access:** Edit the file **web-application-name/WEB-INF/classes/resources/AMResources.properties**, and set the properties **banner0**, **banner1** and **banner2** to:

```
http://server-name:port/web-application-name/jsp/amblank.jsp
```

...where:

server-name is the domain name of your Integra UI server

port is the port Integra normally accesses on the UI server

web-application-name is the name you specified in the Integra Installer

- 18** Restart the domain where you deployed the Integra web application.

Configure Apps 5.1.1

You have configured the Integra UI server. Proceed to the *Integra Apps 5.1.1 Administration Guide* and configure Apps 5.1.1.

Appendix: Install Tomcat

This section summarizes the process of acquiring and installing Tomcat. Refer to the manufacturer's instructions for important details.

Acquire Tomcat

- 1 Visit <http://jakarta.apache.org/tomcat/>
- 2 The Tomcat page appears. Click on **Current Releases** on the left side of the page:

Download

- [Current Releases](#)

Install Tomcat

At the time of writing, the current release is 5.5.9. In the following steps, replace "5.5.9" with the new current release number.

3 **Windows users:**

- a. Download **5.5.9 exe**, **5.5.9 Admin zip**, and, if the Integra UI server has Java 1.4.2, **5.5.9 Compat zip**.
- b. Launch **5.5.9 exe** (the Tomcat installer). You must install Tomcat in a directory whose full path (excluding the drive name) is 8 characters or less, and contains only letters and digits. **c:\tomcat** is recommended.
- c. Once Tomcat is installed, unzip the contents of **5.5.9 Admin zip** (and, if the UI server has Java 1.4.2, **5.5.9 Compat zip**) in the **tomcat** directory.
- d. Verify that the OS environment variable **JAVA_HOME** is set to the directory where Java is installed. (In Windows XP, right-click on **My Computer** and select **Properties**; click the **Advanced** tab; click **Environment Variables**; **JAVA_HOME** must be listed in the **System variables** section.)

Unix/Linux users:

- a. Download **5.5.9 tar.gz**, **5.5.9 Admin tar.gz**, and, if the Integra UI server has Java 1.4.2, **5.5.9 Compat tar.gz**.

- b. Put the contents of **5.5.9 tar.gz** in the **tomcat** directory on the UI server.
- c. Once Tomcat is installed, put the contents of **5.5.9 Admin zip** (and, if the UI server has Java 1.4.2, **5.5.9 Compat zip**) in the **tomcat** directory.
- d. Verify that the following OS environment variables are set in Integra's environment initialization profile (e.g., **.profile**, **.bashrc**, **.bash_profile**, **.cshrc**):

JAVA_HOME	Full path to the directory where Java is installed
------------------	--

CATALINA_HOME	Full path to the tomcat directory
----------------------	--

CLASSPATH	Add the full path to the tomcat/bin directory
------------------	--
