

SeeBeyond™ eBusiness Integration Suite

e*Xchange Partner Manager Installation Guide

Release 4.5.1



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Introduction

This e*Xchange Partner Manager Installation Guide provides instructions for installing the e*Xchange Partner Manager components of the SeeBeyond eBusiness Integration Suite.

This Installation Guide covers only the installation of the e*Xchange Partner Manager components. Refer to additional publications for installing additional components.

Table 1 Related Publications For Installing Additional Components

For instructions on installing this component...	Refer to this publication...
e*Gate	<i>e*Gate Integrator Installation Guide</i>
ASC X12 ETD Library	<i>ASC X12 ETD Library User's Guide</i>
RosettaNet ETD Library	<i>RosettaNet ETD Library User's Guide</i>
UN/EDIFACT ETD Library	<i>UN/EDIFACT ETD Library User's Guide</i>

1.1 Document Purpose and Scope

This guide explains how to install the SeeBeyond Technology Corporation™ SeeBeyond eBusiness Integration Suite. This user guide includes information on the following topics:

- Installation of e*Xchange Partner Manager
- Upgrading e*Xchange Partner Manager from Version 4.1.2 to 4.5.1.

1.2 Intended Audience

The reader of this guide is presumed to be a developer or system administrator with responsibility for installing the SeeBeyond eBusiness Integration Suite. He or she should have expert-level knowledge of Windows NT and UNIX operations and administration, and should be thoroughly familiar with Windows-style GUI operations.

To install the e*Xchange GUI and back end, the reader should have an understanding of e*Gate Integrator 4.5.1, including the location of the Registry, Participating Host, and

the e*Gate Enterprise Manager GUI. To create the database schema, the reader should have knowledge of database administration for Oracle, SQL Server, Sybase, or DB2 UDB.

1.3 Organization of Information

The e*Xchange Partner Manager Installation Guide includes the following information:

- 1 - Introduction to the various applications included in the SeeBeyond eBusiness Integration Suite and the components of each.
- 2 - Overview of the SeeBeyond eBI Suite.
- 3 - Overview of, and requirements for, the installation process.
- 4 - Instructions for installing the e*Xchange Web Interface.
- 5 - Instructions for installing the e*Xchange eGate Schema.
- 6 - Instructions for installing the e*Xchange Repository Manager.
- 7 - Instructions for installing the Validation Rules Builder and the Java Runtime Environment.
- 8 - Instructions for installing the e*Xchange Client for Windows.
- 9 - Instructions on installing Oracle database schemas.
- 10 - Instructions on installing SQL Server database schemas.
- 11 - Instructions on installing Sybase database schemas.
- 12 - Instructions on installing DB2 UDB database schemas.
- Appendix A -Instructions on upgrading e*Xchange e*Gate schemas from version to 4.5.1
- Appendix B- Instructions on upgrading e*Xchange database schemas from version 4.1.2 to 4.5.1.
- Appendix C- Instructions on upgrading e*Xchange database schemas from version 4.5 to 4.5.1.
- Appendix D- Instructions on upgrading e*Xchange database schemas from version 4.1.1 to 4.1.2.
- Appendix E- Instructions on upgrading e*Xchange database schemas from version 4.1.0 to 4.1.1.

1.4 Writing Conventions

The writing conventions listed in this section are observed throughout this document.

Hypertext Links

When you are using this guide online, cross-references are also hypertext links and appear in [blue text](#) as shown below. Click the [blue text](#) to jump to the section.

For information on these and related topics, see [“Supporting Documents” on page 4](#).

Command Line

Text to be typed at the command line is displayed in a special font as shown below.

```
java -jar ValidationBuilder.jar
```

Variables within a command line are set in the same font and bold italic as shown below.

```
stcregutil -rh host-name -un user-name -up password -sf
```

Code and Samples

Computer code and samples (including printouts) on a separate line or lines are set in the command-line font as shown below.

```
Configuration for BOB_Promotion
```

However, when these elements (or portions of them) or variables representing several possible elements appear within ordinary text, they are set in *italics* as shown below.

path and *file-name* are the path and file name specified as arguments to **-fr** in the **stcregutil** command line.

Notes and Cautions

Points of particular interest or significance to the reader are introduced with *Note*, *Caution*, or *Important*, and the text is displayed in *italics*, for example:

Note: The Actions menu is only available when a Properties window is displayed.

User Input

The names of items in the user interface such as icons or buttons that you click or select appear in **bold** as shown below.

Click **Apply** to save, or **OK** to save and close.

File Names and Paths

When names of files are given in the text, they appear in **bold** as shown below.

Use a text editor to open the **ValidationBuilder.properties** file.

When file paths and drive designations are used, with or without the file name, they appear in **bold** as shown below.

In the **Open** field, type **D:\setup\setup.exe** where **D:** is your CD-ROM drive.

Parameter, Function, and Command Names

When names of parameters, functions, and commands are given in the body of the text, they appear in **bold** as follows:

The default parameter **localhost** is normally only used for testing.

The Monk function **iq-put** places an Event into an IQ.

After you extract the schema files from the CD-ROM, you must import them to an e*Gate schema using the **stcregutil** utility.

1.5 Supporting Documents

The following SeeBeyond documents provide additional information about the e*Exchange Partner Manager and e*Gate:

- *SeeBeyond eBusiness Integration Suite Deployment Guide*
- *SeeBeyond eBusiness Integration Suite Primer*
- *e*Exchange Partner Manager User's Guide*
- *e*Exchange Partner Manager Implementation Guide*
- *e*Gate Integrator Alert Agent User's Guide*
- *e*Gate Integrator Alert and Log File Reference Guide*
- *Collaboration Services Reference Guide*
- *System Administration and Operations Guide*
- *e*Gate Integrator User's Guide*
- *Monk Developer's Reference*

1.6 SeeBeyond Web Site

The SeeBeyond Web site is your best source for up-to-date product news and technical support information. The site's URL is

<http://www.SeeBeyond.com>

Introduction to the SeeBeyond eBI Suite

This chapter provides an overview of the SeeBeyond eBusiness Integration Suite.

2.1 SeeBeyond eBusiness Integration Suite

Complex and dynamic partner relationships, and the management of various processes, present a tremendous challenge in eBusiness. Organizations and their trading partners are both faced with the problem of managing disparate component applications and aligning proprietary software requirements. In addition, organizations and their trading partners must agree on data exchange and security standards.

The SeeBeyond eBusiness Integration Suite merges traditional Enterprise Application Integration (EAI) and Business-to-Business (B2B) interactions into a multi-enterprise eBusiness Integration (eBI) product suite. This suite allows you to:

- Leverage your existing technology and applications.
- Create an eApplication consisting of component applications that are managed by your organization or your trading partners.
- Rapidly execute eBusiness strategies.
- Create and manage virtual organizations across the entire value chain.
- Rapidly implement industry standard business protocols.
- Quickly and easily establish new business partners, or update existing ones.
- Automatically secure transmissions sent over the public domain.

This suite also provides:

- Extensive and flexible back-office connectivity.
- Powerful data transformation and mapping facilities.
- Content-based routing.
- Unparalleled scalability based on a fully distributed architecture.

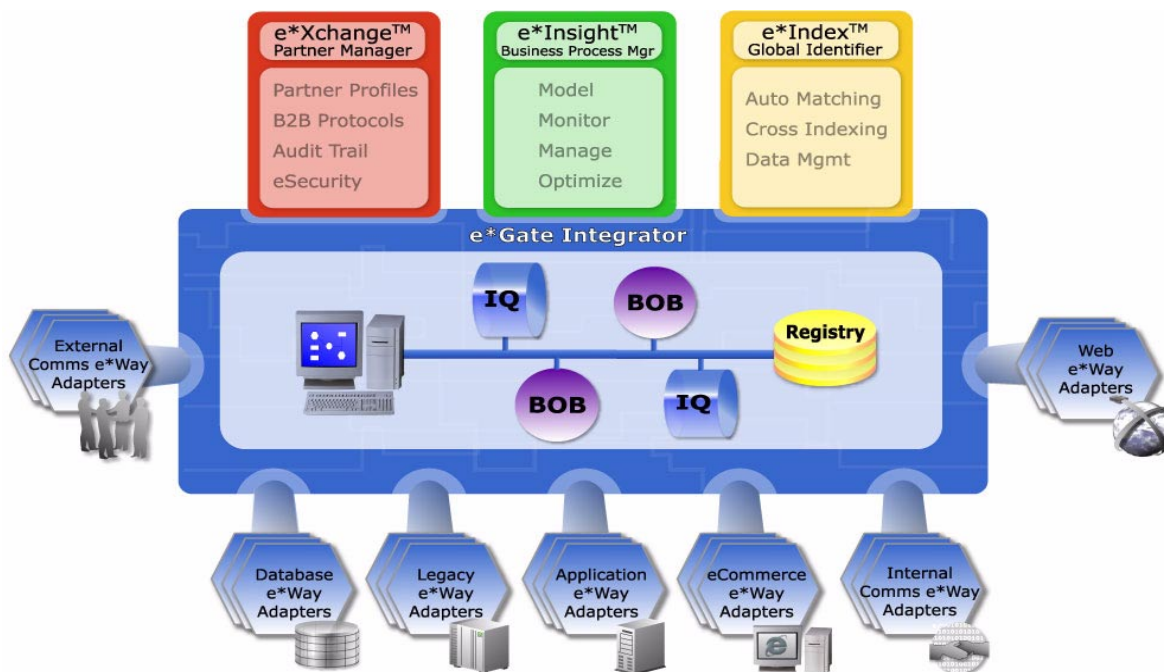
2.1.1 SeeBeyond eBusiness Integration Suite Components

The SeeBeyond eBusiness Integration Suite includes the following components and sub-components:

- eBusiness integration applications:
 - ♦ e*Insight™ Business Process Manager
 - ♦ e*Xchange™ Partner Manager
 - ♦ e*Index Global Identifier
- e*Gate™ Integrator:
 - ♦ e*Way™ Intelligent Adapters
 - ♦ Intelligent Queues (IQ™)
 - ♦ Business Object Brokers (BOBs)

See Figure 1 for a graphical representation of the SeeBeyond eBusiness Integration Suite and its components.

Figure 1 SeeBeyond eBusiness Integration Suite



e*Insight Business Process Manager

The e*Insight Business Process Manager facilitates the automation and administration of business process flow across eBusiness activities. Through graphical modeling and monitoring, business analysts can instantly assess the detailed state of a business process instance and identify bottlenecks in the process.

e*Xchange Partner Manager

The e*Xchange Partner Manager manages trading partner profiles and supports standard eBusiness message format and enveloping protocols, including RosettaNet, UN/EDIFACT, ASC X12, and BizTalk. The e*Xchange Partner Manager includes a Validation Rules Builder to aid in the creation of X12 and UN/EDIFACT message validation based on industry implementation guides.

The eSecurity Manager authenticates and ensures full integrity of message data sent to and from trading partners, which is imperative when conducting eBusiness over the public domain. The eSecurity Manager uses public key infrastructure (PKI) to ensure origin authentication of the sender and encryption ensures business messages remain secure and private.

e*Index Global Identifier

e*Index Global Identifier (e*Index) is a global cross-indexing application that provides a complete solution for automated person-matching across disparate source systems, simplifying the process of sharing member data between systems.

e*Index centralizes information about the people who participate throughout your business enterprise. The application provides accurate identification and cross-referencing of member information in order to maintain the most current information about each member. e*Index creates a single, consistent view of all member data by providing an automatic, common identification process regardless of the location or system from which the data originates.

e*Gate Integrator Components

e*Gate Integrator enables the flow of information across an extended enterprise by providing comprehensive connectivity to applications and datastores across a network. e*Gate is based on a distributed architecture with an open design that deploys flexible load balancing options. e*Gate processes Events according to user-defined business logic and integrates business processes between applications, ensuring end-to-end data flow into back-office systems.

e*Way Intelligent Adapters

e*Way Intelligent Adapters provide specialized application connectivity and also provide support for robust data processing such as business Collaborations, transformation logic, and publish/subscribe relationships. e*Way adapters are multi-threaded to enable high-performance distributed processing capabilities. This multi-threaded processing allows for ultimate deployment flexibility and load balancing.

Intelligent Queues

Intelligent Queues (IQs) are open-queue services for SeeBeyond or third-party queuing technology that provide robust data transport.

In conjunction with Java-enabled Collaborations, SeeBeyond JMS IQs can provide guaranteed exactly once delivery of messages.

Business Object Brokers

A BOB component is similar to an e*Way in the sense that it establishes connectivity and is capable of data transformation. BOBs use Collaborations to route and transform data within the e*Gate system. They have the following properties:

- They only communicate with IQs within e*Gate. They do not communicate with external applications as e*Ways do.
- They are optional by design. You can add them to an environment to remove some load from your e*Ways, either to set up easily maintainable data processing or to enable multiple internal processes.

Installing the e*Xchange Web Interface

This chapter describes the process for installing the e*Xchange Web Interface. The installation process installs Apache httpd Server 1.3.19 and Tomcat 3.2.1.

The Apache httpd Server wizard is activated during the installation process.

Tomcat files are copied during the installation process. To complete the configuration Tomcat is started and the epm.std file is updated. If the automatic configuration is unsuccessful, you must complete it manually. See [“Manually Configuring Tomcat” on page 13](#).

Note: *In order to access a database schema from the e*Xchange Web Interface, you must have the database schema installed. See [“Creating the e*Xchange Database Schema—Oracle” on page 45](#), [“Creating the e*Xchange Database—SQL Server” on page 56](#), [“Creating the e*Xchange Database—Sybase” on page 65](#), or [“Creating the e*Xchange Database—DB2 UDB” on page 74](#) for more information.*

3.1 Overview

This chapter provides information on the following items:

- System requirements
- Installing the e*Xchange Web Interface on Windows NT or 2000
- Manually configuring Tomcat
- Upgrading the e*Xchange Web Interface from 4.5 to 4.5.1
- Uninstalling Apache http Server and Tomcat

3.2 System Requirements

The e*Xchange Web Interface must be installed on a Windows NT or 2000 workstation that can access an Oracle, SQL Server, Sybase, or DB2 UDB database. Additional requirements include:

- Pentium-class CPU, 300 MHz or higher

- Minimum 128 MB RAM
- 70 MB disk space

Driver Requirements

The e*Xchange Web Interface needs to connect to the e*Xchange database. The table below describes the driver requirements for the supported databases.

Table 2 e*Xchange Web Interface Driver Requirements

Database	Driver	Install Procedure
Oracle	JDBC	Copy classes12.zip into <EX_HOME>/lib. This file is installed as part of the Oracle installation.
SQL Server	Merant JDBC	Automatically installed by the e*Xchange Web Interface.
Sybase	Merant JDBC	Installed automatically by the e*Xchange Web Interface installation.
DB2 UDB	JDBC	The db2java.zip file should be located in %DB2TEMPDIR%/JAVA. This is installed as part of the DB2 UDB installation (Client or Server).

3.3 Installing the e*Xchange Web Interface

- You must have Administrator privileges to install the e*Xchange Web Interface.
- Exit all Windows programs, including any anti-virus applications.
- Verify your database type and setup.
- You must have Java SDK version 1.3x. This is required for running the Tomcat Web server. If it is not installed on your machine, do the following:
 - ♦ Download it from the Java Web site at this address:
<http://java.sun.com/j2se/1.3/download-windows.html>
 - ♦ Install Java SDK by running the downloaded file
 - ♦ Make sure that your JAVA_HOME environment variable is pointing to the location of the **tools.jar** file. To do this you can do either of the following:
 - ♦ Copy **tools.jar** (located in the **lib** directory created by installation of Java SDK) to your e*Xchange folder: for example, **C:\eXchange\jre\1.3\lib**.

3.3.1 Installing the e*Exchange Web Interface on Windows NT or 2000

To install the e*Exchange Web Interface on Windows NT or 2000

- 1 Log in to the workstation on which you want to install the schema.
- 2 Insert the installation CD into the CD-ROM drive.
If Autorun is enabled, the setup program automatically starts. Otherwise:
 - ♦ On the task bar, click the **Start** button, and then click **Run**.
 - ♦ In the **Open** field, type **D:\setup\setup.exe** where **D:** is your CD-ROM drive.
- 3 Follow the online prompts through the **Welcome**, **Software License Agreement**, and **Information** dialog boxes.

Note: *The **Software License Agreement** appears twice during the installation process, and must be accepted to continue with the installation.*

- 4 When the **User Information** dialog box appears, enter the user name and company for which this software is installed, and then click **Next**.
- 5 In the **Please choose the product to install** dialog box, select the **e*Exchange Partner Manager** check box, and then click **Next**.

The **Check Setup Information** dialog box appears.

Note: *Selecting the **e*Gate Integrator** check box installs **e*Gate** components, some of which are required for **e*Exchange**. This guide does not cover installation of those components. For information on installing **e*Gate** components, refer to the **e*Gate Integrator Installation Guide**.*

- 6 In the **Check Setup Information** dialog box, confirm that the **e*Exchange** component has been selected, and then click **Next**.
This launches the **e*Exchange** portion of the setup wizard.
- 7 Follow the online prompts, through the **Welcome**, **Software License Agreement**, and **Information** dialog boxes.
- 8 In the **User Information** dialog box, enter the user name and company for which this software is installed, and then click **Next**.
- 9 In the **Choose Destination Location** dialog box, click **Browse** to change the destination folder; otherwise, click **Next** to continue.
- 10 Select **e*Exchange Web Interface**, and then click **Next**.

The **Check Setup Information** dialog box appears.

- 11 In the **Check Setup Information** dialog box, review the installation information, and then click **Next**.

The **Select e*Exchange Partner Manager Web Interface Install/Upgrade** dialog box appears.

12 Select Full Install.

The **Select Database Server to support e*Xchange Web Interface** dialog box appears.

In the **Select Database Server to support e*Xchange Web Interface** dialog box, select the database type, and then click **Next**. The following screens depend on the type of database selected. Refer to the following sections:

Database	Section
Oracle	“To install the e*Xchange Web Interface on Oracle” on page 12
SQL Server	“To install the e*Xchange Web Interface on SQL Server” on page 12
Sybase	“To install the e*Xchange Web Interface on Sybase” on page 12
DB2 UDB	“To install the e*Xchange Web Interface on DB2 UDB” on page 13

To install the e*Xchange Web Interface on Oracle

- 13 In the **e*Xchange Partner Manager Database Information** dialog box, enter the name and host to identify the database, and then click **Next**.

Note: The name does not need to match the SID for the database..

- 14 In the second **e*Xchange Partner Manager Database Information** dialog box, enter the port number and OracleSID for the database, and then click **Next**.

Continue with [“Apache httpd Server Installation” on page 13](#).

To install the e*Xchange Web Interface on SQL Server

- 15 In the **e*Xchange Partner Manager Database Information** dialog box, enter the name and host to identify the database, and then click **Next**.

Note: The name does not need to match the database name.

- 16 In the second **e*Xchange Partner Manager Database Information** dialog box, enter the port number and database name, and then click **Next**.

Continue with [“Apache httpd Server Installation” on page 13](#).

To install the e*Xchange Web Interface on Sybase

- 17 In the **e*Xchange Partner Manager Database Information** dialog box, enter the name and host to identify the database, and then click **Next**.

Note: The name does not need to match the database name.

- 18 In the second **e*Xchange Partner Manager Database Information** dialog box, enter the port number and database name, and then click **Next**.

Continue with [“Apache httpd Server Installation” on page 13.](#)

To install the e*Xchange Web Interface on DB2 UDB

- 19 In the **e*Xchange Partner Manager Database Information** dialog box, enter the name to identify the database, and then click **Next**.

Note: The name does not need to match the database name.

- 20 In the second **e*Xchange Partner Manager Database Information** dialog box, enter the database name, and then click **Next**.

Apache httpd Server Installation

- 21 The Apache httpd Server Installation Wizard will automatically be started. Follow the installation wizard, taking the default options.

Note: The default directory for Apache httpd Server is C:\Program Files\Apache Group. You can change this location if required.

Note: If you cancel the Apache httpd Server Installation Wizard because Apache is already installed, you may see a message warning that the Apache service is not started. This message can be ignored.

- 22 Click **Finish** to exit the Apache httpd Server Installation Wizard.

An Information dialog appears to inform you where to direct your browser.

- 23 In the **Setup Complete** dialog box, click **Finish** to complete the e*Xchange Web Interface installation.

- 24 In the **Setup Complete** dialog box, select whether to reboot the computer now or later, and click **Finish** to complete the installation process.

Important: If the installation is successful, Tomcat will be automatically started. To determine whether Tomcat has been started, check that the file `mod_jk.conf-auto` exists. The default location for this file is `C:\eXchange\tomcat-3.2.1\conf`. If the file does not exist see [“Manually Configuring Tomcat” on page 13.](#)

3.3.2 Manually Configuring Tomcat

This procedure should only be followed if the automatic configuration of Tomcat has not been successful.

If the installation is successful then Tomcat will be automatically started. To determine whether Tomcat has been started, check that the file `mod_jk.conf-auto` exists. The default location for this file is `C:\eXchange\tomcat-3.2.1\conf`. If this file does not exist follow the steps below:

Note: The default file location is based on the assumption that e*Xchange has been installed into **C:\eXchange**.

- 1 Start Tomcat by running **startup.bat**, either from a DOS prompt or by double clicking. The default location for this file is **C:\eXchange\tomcat-3.2.1\bin**.
- 2 Check that the file **mod_jk.conf-auto** exists to ensure that Tomcat is started. The default location for this file is **C:\eXchange\tomcat-3.2.1\conf**.
- 3 Modify **epm.std** to include information about your database. The default location for this file is **C:\eXchange\tomcat-3.2.1\webapps\stcepmweb\web-inf**. Ensure that the parameters are configured correctly for your database. Example configurations are shown below.

Note: The status is set to **D (Disabled)** for the examples in this file. Change to **A (Active)** for all database connections that you copy from these examples.

Oracle

```
<server>
  <name>ORACLE SAMPLE2</name>
  <description>Oracle Server SERVERNAME.DOMAIN.COM Using Web
Login for Database Connection</description>
  <status>D</status>
  <url>jdbc:oracle:thin:@db-host:1521:db-sid</url>
</server>
```

SQL Server

```
<server>
  <name>SQLSERVER SAMPLE1</name>
  <status>D</status>
  <url>jdbc:SeeBeyond:sqlserver://db-host:1433;DatabaseName=db-
name;embedded=true</url>
  <username>*****</username>
  <password>*****</password>
</server>
```

Sybase

```
<server>
  <name>SYBASE SAMPLE1</name>
  <status>D</status>
  <url>jdbc:SeeBeyond:sybase://db-host:5000;DatabaseName=db-
name;embedded=true</url>
  <username>*****</username>
  <password>*****</password>
</server>
```

DB2 UDB

```
<server>
  <name>DB2 SAMPLE</name>
  <description>DB2 Database</description>
  <status>D</status>
  <url>jdbc:db2:db-name</url>
  <username>*****</username>
  <password>*****</password>
</server>
```

- 4 Start the Apache service. Click the **Start** menu, point to **Programs, Apache httpd Server, Control Apache Server**, and click **Start**.

- 5 Start your Web Browser and enter the URL given on completion of the e*Xchange Partner Manager Web Interface Installation. By default this is:

`http://localhost/stcepmweb/login_form.jsp`

Shutting down Apache httpd Server

To stop the Apache service, Click the **Start** menu, point to **Programs, Apache httpd Server, Control Apache Server**, and click **Stop**.

Shutting down Tomcat

- To shut down Tomcat run shutdown.bat, either from the DOS prompt or by double-clicking. The default location for this file is **C:\eXchange\tomcat-3.2.1\bin**.

3.4 Upgrading the e*Xchange Web Interface

Before you begin:

- You must have Administrator privileges to upgrade the e*Xchange Web Interface.
- Exit all Windows programs, including any anti-virus applications.
- Verify your database type and setup.
- You must have Java SDK version 1.3x. This is required for running the Tomcat Web server. If it is not installed on your machine, do the following:
 - ♦ Download it from the Java Web site at this address:
<http://java.sun.com/j2se/1.3/download-windows.html>
 - ♦ Install Java SDK by running the downloaded file
 - ♦ Make sure that your JAVA_HOME environment variable is pointing to the location of the **tools.jar** file. To do this you can do either of the following:
 - ♦ Copy **tools.jar** (located in the **lib** directory created by installation of Java SDK) to your e*Xchange folder: for example, **C:\eXchange\jre\1.3\lib**.
 - ♦ Change the JAVA_HOME environment variable to point to the location where you installed Java SDK: for example, **C:\jdk1.1.3**.

3.4.1 Upgrading the e*Xchange Web Interface on Windows NT or 2000

To install the e*Xchange Web Interface on Windows NT or 2000

- 1 Log in to the workstation on which you want to upgrade the schema.
- 2 Insert the installation CD into the CD-ROM drive.

If Autorun is enabled, the setup program automatically starts. Otherwise:

- ♦ On the task bar, click the **Start** button, and then click **Run**.
- ♦ In the **Open** field, type **D:\setup\setup.exe** where **D:** is your CD-ROM drive.

- 3 Follow the online prompts through the **Welcome**, **Software License Agreement**, and **Information** dialog boxes.

Note: *The **Software License Agreement** appears twice during the installation process, and must be accepted to continue with the installation.*

- 4 When the **User Information** dialog box appears, enter the user name and company for which this software is installed, and then click **Next**.
- 5 In the **Please choose the product to install** dialog box, select the **e*Exchange Partner Manager** check box, and then click **Next**.

The **Check Setup Information** dialog box appears.

Note: *Selecting the **e*Gate Integrator** check box installs **e*Gate** components, some of which are required for **e*Exchange**. This guide does not cover installation of those components. For information on installing **e*Gate** components, refer to the **e*Gate Integrator Installation Guide**.*

- 6 In the **Check Setup Information** dialog box, confirm that the **e*Exchange** component has been selected, and then click **Next**.

This launches the **e*Exchange** portion of the setup wizard.

- 7 Follow the online prompts, through the **Welcome**, **Software License Agreement**, and **Information** dialog boxes.
- 8 In the **User Information** dialog box, enter the user name and company for which this software is installed, and then click **Next**.
- 9 In the **Choose Destination Location** dialog box, click **Browse** to change the destination folder; otherwise, click **Next** to continue.
- 10 In the **Select Components** dialog box, select the **e*Exchange Web Interface**, and then click **Next**.

The **Check Setup Information** dialog box appears.

- 11 In the **Check Setup Information** dialog box, review the installation information, and then click **Next**.

The **Select e*Exchange Partner Manager Web Interface Install/Upgrade** dialog box appears.

- 12 Select **Upgrade From 4.5.0 to 4.5.1**.

The **Select Database Server to support e*Exchange Web Interface** dialog box appears.

- 13 In the **Select Database Server to support e*Exchange Web Interface** dialog box, select **Oracle**, and then click **Next**.

- 14 In the **e*Xchange Partner Manager Database Information** dialog box, enter the name and host to identify the database, and then click **Next**.

Note: The name does not need to match the SID for the database..

- 15 In the second **e*Xchange Partner Manager Database Information** dialog box, enter the port number and OracleSID for the database, and then click **Next**.
- 16 In the **Setup Complete** dialog box, click **Finish** to complete the e*Xchange Web Interface installation.
- 17 In the **Setup Complete** dialog box, select whether to reboot the computer now or later, and click **Finish** to complete the installation process.

3.4.2 Update the CLASSPATH environment variable

After upgrading to 4.5.1, it may be desirable to remove entries in the CLASSPATH that are no longer required. The following **CLASSPATH** environment variable references can be removed:

- %TOMCAT_HOME%
- stcepmapi.jar
- stcepmbean.jar

3.4.3 Backup directory

The upgrade process creates the directory <EX_HOME>/Backup and copies the following files from the previous version to this location:

- epm.std
- jar files
- war files

The information about your database can be copied from epm.std if you are manually configuring Tomcat.

3.5 Uninstalling Apache httpd Server

To remove Apache httpd Server, use Add/Remove Programs from Control Panel.

Note: Before reinstalling Apache httpd Server ensure that all Apache files have been deleted. By default they will be found in **C:\Program Files\Apache Group**.

Note: Since Apache and Tomcat files are used together, it is recommended that if you delete Apache files, Tomcat files should also be cleaned up.

3.6 Uninstalling Tomcat

To uninstall Tomcat simply delete the Tomcat files. The default location for these is **C:\eXchange\tomcat-3.2.1**.

Note: *The installation of Tomcat adds information to the CLASSPATH environment variable. If you are permanently removing Tomcat, or have installed multiple versions of the e*Exchange Web Interface, it may be desirable to remove redundant variables.*

Installation Overview

This chapter provides an overview of the steps necessary for a successful e*Xchange installation.

4.1 e*Xchange Installation Summary

This user guide describes how to install the e*Xchange Partner Manager components. During the installation process you will install the following four components:

- e*Xchange relational database schema—Includes all of the files necessary to create the e*Xchange database schema on the database server.
- e*Xchange Web Interface—Includes the Web Interface and Apache/Tomcat.
- e*Xchange eGate Schema—Includes the e*Gate schema components for e*Xchange and the eSecurity Manager component.
- e*Xchange Repository Manager GUI
- e*Xchange Validation Rules Builder—Includes all of the files necessary to install the e*Xchange Validation Rules Builder and the Java Runtime Engine version 1.3.
- e*Xchange Client for Windows.

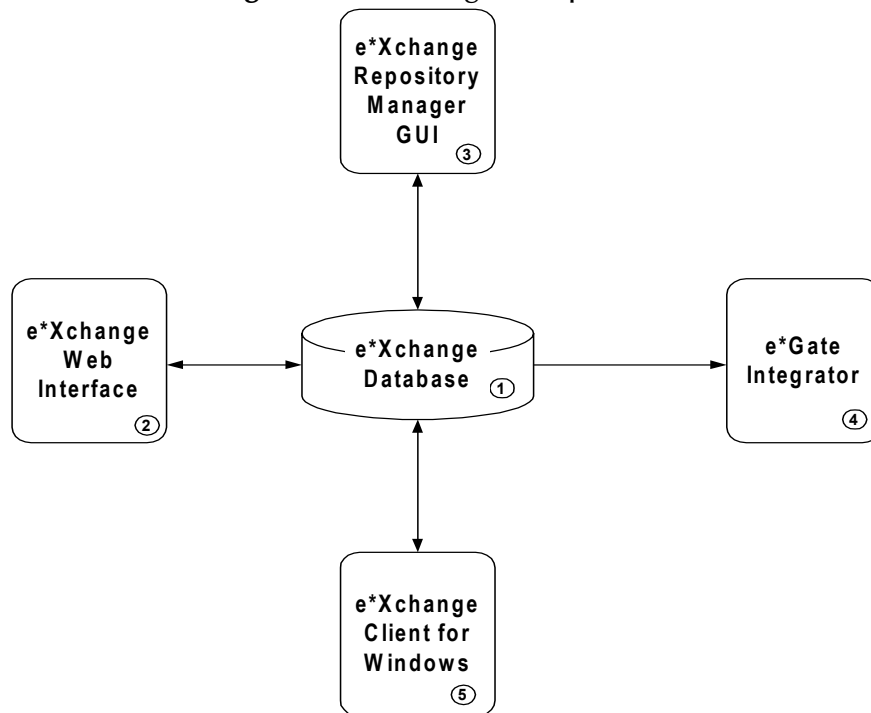
The Web Interface, e*Gate schema, GUIs and relational database schema portions are installed using the Install Shield® Wizard directly from the CD. The Validation Rules Builder is installed separately.

This guide contains separate chapters for installing the GUIs and the e*Gate Schema for e*Xchange. You can choose to install these components separately or at the same time.

4.2 Overview of e*Xchange Components

There are a number of components required when using e*Xchange Partner Manager. This section describes the purpose of each component and how they connect to the other components. shows the main components.

Figure 2 e*Xchange Components



- 1 **e*Xchange Database**—This is the repository for all information about e*Xchange Partner Manager. This includes trading partner details, in addition to messages that have been sent and received.
- 2 **e*Xchange Web Interface**—This is the interface that allows the user to access the information held on the database. It can be used to manage the trading partner details and monitor the messages.
- 3 **e*Xchange Repository Manager GUI**—This GUI allows the user to import and export trading partner profiles, and to archive/de-archive of message data.
- 4 **e*Gate Integrator**—This is required to run the e*Gate schema for e*Xchange. The e*Gate schema provides the connectivity to the trading partners, and other systems and applications.
- 5 **e*Xchange Client for Windows**—This component has similar functionality to the e*Xchange Web Interface. However, it cannot be used with a DB2 Universal Database (DB2 UDB) database.

4.3 System Requirements

The following sections provide details on the hardware, software, and disk space requirements for the e*Xchange installation, as well as a list of supported platforms.

4.3.1 Hardware Requirements

The e*Exchange GUIs must be installed on a Windows NT or 2000 workstation that includes the following minimum requirements:

- Pentium-class CPU, 300 MHz or higher
- Minimum 128 MB RAM
- 70 MB disk space

4.3.2 Software Requirements

e*Exchange Partner Manager requires that the following applications and components be installed prior to installing the e*Exchange components:

- e*Gate Integrator 4.5.1
- Oracle 8i (Server) (8.1.6 or 8.1.7), SQL Server 7.0 (Server), SQL Server 2000, or Sybase 11.9 or 12 (Server), DB2 UDB 7.1
- Java Runtime Environment for Java 1.3.x (for the Validation Rules Builder)

e*Exchange Web Interface

- Java SDK version 1.3.x.

e*Gate Integrator 4.5.1

e*Exchange uses e*Gate as its underlying core technology. In order to run e*Exchange components, the following e*Gate components must be available:

- Registry
- Participating Host
- GUI
- Oracle e*Way or ODBC e*Way (for SQL Server, Sybase, and DB2 UDB)
- Sybase e*Way
- HTTPS e*Way (Java enabled)
- Batch e*Way
- e-Mail e*Way
- CGI Web Server e*Way (Client and Server)
- e*Gate API Kit

The e*Gate e*Ways are installed as add-ons from the e*Gate Integrator portion of the installation CD. The e*Ways must be installed on an e*Gate Participating Host.

For information on installing e*Gate components, see the *e*Gate Integrator Installation Guide*.

Oracle

- The e*Exchange Oracle database schema must be created in an existing Oracle 8i (8.1.6 or 8.1.7) instance. This instance can be created using custom settings as

required to handle expected throughput and volume of data stored in the e*Xchange schema. For requirements associated with the Oracle instance, see the appropriate Oracle user guide(s).

- The default disk space for the e*Xchange Oracle schema is 490 MB. You should adjust this as necessary, based on the throughput and storage requirements for your enterprise.
- The hard disk requirement for each Oracle8i product includes 15 MB which is required to install Java Runtime Environment (JRE) and Oracle Universal Installer on the partition in which the operating system is installed.

SQL Server

- The e*Xchange SQL Server database must be created in an existing SQL Server 7.0 or SQL Server 2000 instance. For requirements associated with the SQL Server instance, see the appropriate SQL Server user guides.

Important: *When creating the SQL Server 2000 database, make sure the data source has been set to verify the authenticity of the login ID using a login ID and password entered by the user.*

*Also, to use SQL Server with e*Xchange, your database must be set to **not** be case-sensitive (this is the default setting).*

Sybase

- For requirements associated with Sybase, see the appropriate Sybase user guides.

Important: *To use Sybase with e*Xchange, your database must be set to **not** be case-sensitive. Since case-sensitive is the default setting, follow the instructions in “**To set a Sybase database to be case-insensitive**” below to change the setting.*

To set a Sybase database to be case-insensitive

- 1 Start Server Config.
- 2 Click **Configure Adaptive Server**.
- 3 Select your server and click **Continue**.
- 4 Enter the SA login and password and click **Continue**.
- 5 Click the **Language** button.
- 6 Under **Sort Order**, click the **Set Default** button.
- 7 Select **Dictionary Order, Case Insensitive**.
- 8 Click the **OK** or **Save** button on each dialog box to save the changes.

DB2 UDB

- For requirements associated with DB2 UDB 7.1, see the appropriate DB2 UDB user guides.

4.3.3 Supported Platforms

e*Xchange is available for the following platforms:

- Windows NT 4.0 with Service Pack 6 or higher; or Windows 2000
- Solaris 7, 8
- HPUX 11.0
- AIX 4.3.3
- Compaq Tru64 v4.0F

Important: The CD is built in a Windows format. To copy a file from the CD to a Unix machine, first copy the file from the CD to a temporary location on a Windows machine. Then transfer the file via FTP to the applicable Unix machine. The transfer mode for the FTP operation should be set to "binary".

Note: The e*Xchange Client for Windows is available only for Windows NT or 2000. SQL Server 7.0 support is available for all operating systems other than Compaq Tru64.

4.4 Upgrade Scenario

The following scenario outlines the steps you should take when upgrading e*Xchange from version 4.1.2 or 4.5 to 4.5.1. You must upgrade e*Gate and e*Xchange to the same version.

Note: If you wish to upgrade from an earlier version than 4.1.2 please refer to ["Updating the e*Xchange e*Gate Schemas from 4.1.1 to 4.1.2" on page 88](#) and ["Upgrading the e*Xchange Database Schemas from Version 4.1.1 to 4.1.2" on page 100](#).

Table 3 Upgrading e*Gate and e*Xchange from 4.1.2 to 4.5.1

Install e*Gate version 4.5.1	See the e*Gate Integrator Installation Guide for version 4.5.1
Upgrade the e*Xchange database schemas.	"Upgrading the e*Xchange Database Schemas from Version 4.1.2 to 4.5.1" on page 89
Install the e*Xchange Web Interface and e*Xchange Repository Manager.	"Installing the e*Xchange Web Interface" on page 9 and "Installing the e*Xchange Repository Manager" on page 32
Update the e*Gate Schema version.	"Updating the e*Xchange e*Gate Schemas to 4.5.1" on page 86

Table 3 Upgrading e*Gate and e*Xchange from 4.1.2 to 4.5.1

Install e*Xchange Client for Windows	“Installing the e*Xchange Client for Windows” on page 41
Update the VRB and JRE as necessary.	“Additional Installation Requirements” on page 37

Table 4 Upgrading e*Gate and e*Xchange from 4.5 to 4.5.1

Install e*Gate version 4.5.1	See the e*Gate Integrator Installation Guide for version 4.5.1
Upgrade the e*Xchange database schemas.	“Upgrading the e*Xchange Databases from Version 4.5 to 4.5.1” on page 93
Update or install the e*Xchange Web Interface.	“Installing the e*Xchange Web Interface” on page 9 or “Upgrading the e*Xchange Web Interface on Windows NT or 2000” on page 15
Install e*Xchange Repository Manager	“Installing the e*Xchange Repository Manager” on page 32
Update the e*Gate Schema.	“Updating the e*Xchange e*Gate Schemas to 4.5.1” on page 86
Install e*Xchange Client for Windows	“Installing the e*Xchange Client for Windows” on page 41
Update the VRB and JRE as necessary.	“Additional Installation Requirements” on page 37

4.5 Installation at a Glance

The following table summarizes the dependencies between the components, and the order in which to install them. Available platforms are in parentheses.

For information on installing e*Gate components, see the *e*Gate Integrator Installation Guide*.

Table 5 Installation at a Glance

Step	Action	Chapter/Section
1	Install e*Gate version 4.5.1.	See the e*Gate Integrator Installation Guide for version 4.5.1.

Table 5 Installation at a Glance

Step	Action	Chapter/Section
2	Install the e*Xchange database schema on a machine that contains an existing (Oracle, SQL Server, Sybase or DB2 UDB) database instance (Windows NT, 2000 or UNIX).	See “Creating the e*Xchange Database Schema—Oracle” on page 45 , “Creating the e*Xchange Database—SQL Server” on page 56 , “Creating the e*Xchange Database—Sybase” on page 65 or “Creating the e*Xchange Database—DB2 UDB” on page 74 .
3	Install the e*Xchange Web Interface on one or more machines that have a connection to the database (Windows NT or 2000).	See “Installing the e*Xchange Web Interface” on page 10 .
4	Install the e*Xchange eGate Schema from a Windows NT or 2000 machine that has a network connection to the e*Gate Registry Host.	See “Installing the Schema” on page 27 .
5	Install e*Xchange Repository Manager	“Installing the e*Xchange Repository Manager” on page 32
6	Install e*Xchange Client for Windows	“Installing the e*Xchange Client for Windows” on page 41
7	Install the e*Xchange Validation Rules Builder on a machine which contains (or on which you will subsequently install) the correct JRE version. (1.3.x)	See “Installing the Validation Rules Builder” on page 38 .

Installing the e*Xchange eGate Schema

This chapter describes the process for installing the e*Xchange eGate Schema, which consists of the eXSchema. A schema is a configuration scheme that contains all of the modules and configuration parameters that control, route, and transform data as it travels through the e*Gate system. Schemas also maintain the relationships between the components, including the publish/subscribe information that is the heart of the data transportation process.

Note: For information on e*Gate installation procedures, refer to the *e*Gate Integrator Installation Guide*.

5.1 Overview

This chapter provides information on the following items:

- System Requirements
- Installing the back end on Windows NT or 2000
- Installing the back end on UNIX

5.2 System Requirements

The e*Xchange schema must be installed on a Windows NT or 2000 workstation. Additional requirements include:

- Pentium-class CPU, 300 MHz or higher
- Minimum 128 MB RAM
- 70 MB disk space

Driver Requirements

The e*Gate Schema for e*Xchange needs to connect to the e*Xchange database. The table below describes the driver requirements for the supported databases.

Table 6 e*Gate Schema for e*Xchange Driver Requirements

Database	Driver	Install Procedure
Oracle	Oracle	Installed as part of the Oracle installation (Client or Server) 8.1.6 or 8.1.7.
SQL Server	ODBC	Installed as part of the SQL Server installation (Client or Server) 7 or 2000. For information on configuring the ODBC connection see “Creating the SQL Server ODBC Connection” on page 63.
Sybase	Sybase or ODBC	Install Sybase client software. For information on configuring the ODBC connection see 11.6 on page 72.
UDB	ODBC	Installed as part of the UDB installation (Client or Server). For information on configuring the ODBC connection see “Creating the DB2 UDB ODBC Connection” on page 85.

5.3 Installing the Schema

Before you begin:

- You must have Administrator privileges to install the e*Xchange schema.
- Exit all Windows programs, including any anti-virus applications.
- Verify your e*Gate registry host name, schema name, control broker logical name, and the administrator user name and password.

5.3.1 Installing the Back End on Windows NT or 2000

To install the e*Xchange schema on Windows NT or 2000

- 1 Log in to the workstation on which you want to install the schema.
- 2 Insert the installation CD into the CD-ROM drive.
If Autorun is enabled, the setup program automatically starts. Otherwise:
 - ♦ On the task bar, click the **Start** button, and then click **Run**.
 - ♦ In the **Open** field, type **D:\setup\setup.exe** where **D:** is your CD-ROM drive.
- 3 Follow the online prompts through the **Welcome**, **Software License Agreement**, and **Information** dialog boxes.

Note: *The **Software License Agreement** appears twice during the installation process, and must be accepted to continue with the installation.*

- 4 When the **User Information** dialog box appears, enter the user name and company for which this software is installed, and then click **Next**.
- 5 In the **Please choose the product to install** dialog box, select the **e*Xchange Partner Manager** check box, and then click **Next**.

The **Check Setup Information** dialog box appears.

Note: *Selecting the e*Gate Integrator check box installs e*Gate components, some of which are required for e*Xchange. This guide does not cover installation of those components. For information on installing e*Gate components, refer to the e*Gate Integrator Installation Guide.*

- 6 In the **Check Setup Information** dialog box, confirm that the **e*Xchange** component has been selected, and then click **Next**.
This launches the **e*Xchange** portion of the setup wizard.
- 7 Follow the online prompts through the **Welcome**, **Software License Agreement**, and **Information** dialog boxes.
- 8 In the **User Information** dialog box, enter the user name and company for which this software is installed, and then click **Next**.
- 9 In the **Choose Destination Location** dialog box, click **Browse** to change the destination folder; otherwise, click **Next** to continue.
- 10 In the **Select Components** dialog box, select the **e*Xchange eGate Schema** check box.
- 11 Highlight **e*Xchange eGate Schema**, and then click **Change**.
The **Select Sub-components** dialog box appears, listing the subcomponents of the e*Xchange eGate Schema.
- 12 In the **Select Sub-components** dialog box, select the **eSecurity Manager** check box to install this component if required.

Note: *The e*Xchange Partner Manager check box cannot be cleared.*

- 13 Click **Continue** to return to the **Select Components** dialog box, and then click **Next**.
The **Check Setup Information** dialog box appears.
- 14 In the **Check Setup Information** dialog box, review the installation information for the e*Xchange back-end components, and then click **Next**.
The **Registry Host and Schema** dialog box appears.

- 15 In the **Registry Host and Schema** dialog box, enter the e*Gate Registry host name and schema to which you want to add the e*Xchange back-end components, and then click **Next**.
- 16 In the **Administrator Account Information** dialog box, enter the administrator **Username** and **Password**, and password confirmation, and then click **Next**.
- 17 In the **Control Broker Logical Name** dialog box, keep the default (*machine name_cb*) or type a new logical name for the Control Broker for which you want to add the e*Xchange eGate Schema components, and then click **Next**.
- 18 In the **Select e*Gate platforms to support e*Xchange** dialog box, select the client platform that the e*Gate Registry will support, and then click **Next**.

The setup program begins installing the files on your machine.

Important: *In order for the e*Gate Registry to support the operating system of a Participating Host running one or more of the e*Xchange back-end components, you must select the operating system of that host. At this point you can install more than one platform, if necessary. However, the more you install, the greater the system resources that are used.*

- 19 In the **Setup Complete** dialog box, click **Finish** to complete the e*Xchange back-end installation.
- 20 In the **Setup Complete** dialog box, select whether to reboot the computer now or later, and click **Finish** to complete the installation process.

5.3.2 Installing the Back End on UNIX

This section explains how to install the schema on UNIX. You can install the schema (back end) on UNIX from a Windows NT or 2000 machine, but the GUI must run on Windows NT or 2000.

Note: *If you are installing the e*Xchange eGate Schema on a UNIX platform, you need to set up the environment first, including setting the TEMP environment. For example, if the temporary working directory is SMIME_TEMP, make a directory "SMIME_TEMP" and then use one of the following commands.*

```
export TEMP=~/.SMIME_TEMP (korn shell)
```

```
setenv TEMP ~/.SMIME_TEMP (c-shell)
```

Note: *AIX has a single segment memory allocation limit of 256 MB per process by default. This can cause problems when processing large messages. The memory allocation limit can be increase to 2 GB by setting the following environment variable.*

```
LDR_CNTRL=MAXDATA=0x20000000
```

Note: *Compaq TRU64 has a memory allocation limit at the user level that can cause problems when processing large messages. If necessary, the following commands may be used to increase the maximum data area.*

- ♦ *ulimit -a* — indicates the current user settings
- ♦ *ulimit -H* — indicates the maximum allowed hard limits for the specified values
- ♦ *ulimit -d NNNNN* — sets the data area to the specified value, which must be under the value specified in *ulimit -H*

Contact your system administrator to determine what these values should be for your system.

To install the schema on UNIX

- 1 Log in to the Windows NT or 2000 workstation which you want to use to install the UNIX schema.
- 2 Insert the installation CD into the CD-ROM drive.
If Autorun is enabled, the setup program automatically starts. Otherwise:
 - ♦ On the task bar, click the **Start** button, and then click **Run**.
 - ♦ In the **Open** field, type **D:\setup\setup.exe** where **D:** is your CD-ROM drive.
- 3 Follow the online prompts through the **Welcome**, **Software License Agreement**, and **Information** dialog boxes.

Note: The **Software License Agreement** appears twice during the installation process, and must be accepted to continue with the installation.

- 4 When the **User Information** dialog box appears, enter the user name and company for which this software is installed, and then click **Next**.
- 5 In the **Please choose the product to install** dialog box, select the **e*Xchange Partner Manager** check box, and then click **Next**.

Note: Selecting the *e*Gate Integrator* check box installs *e*Gate* components, some of which are required for *e*Xchange*. This guide does not cover installation of those components. For information on installing *e*Gate* components, refer to the *e*Gate Integrator Installation Guide*.

The **Check Setup Information** dialog box appears.

- 6 In the **Check Setup Information** dialog box, confirm that the **e*Xchange** component has been selected, and then click **Next**.

This launches the **e*Xchange** portion of the setup wizard.

- 7 Follow the online prompts through the **Welcome**, **Software License Agreement**, and **Information** dialog boxes.
- 8 In the **User Information** dialog box, enter the user name and company for which this software is installed, and then click **Next**.

- 9 In the **Choose Destination Location** dialog box, click **Browse** to change the destination folder; otherwise, click **Next** to continue.
- 10 In the **Select Components** dialog box, select the **e*Xchange eGate Schema** check box.
- 11 Highlight **e*Xchange eGate Schema**, and then click **Change**.
The **Select Sub-components** dialog box appears, listing the subcomponents of the e*Xchange eGate Schema.
- 12 In the **Select Sub-components** dialog box, select the **eSecurity Manager** check box to install this component.

Note: *The e*Xchange Partner Manager check box cannot be cleared.*

- 13 Click **Continue** to return to the **Select Components** dialog box, and then click **Next**.
The **Check Setup Information** dialog box appears.
- 14 In the **Check Setup Information** dialog box, review the installation information for the e*Xchange back-end components, and then click **Next**.
The **Registry Host and Schema** dialog box appears.
- 15 In the **Registry Host and Schema** dialog box, enter the **UNIX Hostname** and **Schema** to which you want to add the e*Xchange back-end components, and then click **Next**.
- 16 In the **Administrator Account Information** dialog box, enter the administrator **Username** and **Password**, and **password confirmation**, and then click **Next**.
- 17 In the **Control Broker Logical Name** dialog box, type the **UNIX** host name as the **CB Logical Name**, and then click **Next**.
- 18 In the **Select e*Gate platforms to support e*Xchange** dialog box, select the client platform that the e*Gate Registry will support, and then click **Next**.
The setup program begins installing the files on your machine.

Note: *In order for the e*Gate Registry to support the operating system of a Participating Host running one or more of the e*Xchange eGate Schema components, you must select the operating system of that host. At this point you can install more than one UNIX platform, if necessary. However, the more you install, the greater the system resources that are used.*

- 19 In the **Setup Complete** dialog box, click **Finish** to complete the e*Xchange eGate Schema installation.
- 20 In the **Setup Complete** dialog box, select whether you want to reboot the computer now or later, and click **Finish** to complete the installation process.

Installing the e*Xchange Repository Manager

This chapter describes the process for installing the e*Xchange Repository Manager. The Repository Manager GUI allows the user to import and export trading partner profiles or to archive and de-archive messages stored in the message tracking facility.

You can install the e*Gate and e*Xchange GUIs in any order and at any point in the installation process, since they are not dependent on any other e*Gate or e*Xchange component. Each GUI can be installed on any Windows NT or 2000 machine that contains the appropriate necessary software. However, the installation of the e*Xchange Repository Manager requires information about the database that you are connecting to.

6.1 Overview

This chapter provides information on the following items:

- System Requirements
- Installing the e*Xchange Repository Manager GUI

6.2 System Requirements

The e*Xchange GUI must be installed on a Windows NT or 2000 workstation that contains the Oracle, SQL Server, Sybase, or DB2 UDB database that will be used by the GUI. Additional requirements include:

- Pentium-class CPU, 300 MHz or higher
- Minimum 128 MB RAM
- 70 MB disk space

Driver Requirements

The e*Xchange Repository Manager needs to connect to the e*Xchange database. The table below describes the driver requirements for the supported databases.

Table 7 e*Xchange Repository Manager Driver Requirements

Database	Driver	Install Procedure
Oracle	JDBC	Copy classes12.zip into <EX_HOME>/lib. This file is installed as part of the Oracle installation.
SQL Server	Merant JDBC	Installed as part of the e*Xchange Repository Manager installation.
Sybase	Merant JDBC	Installed as part of the e*Xchange Repository Manager installation.
DB2 UDB	JDBC	The db2java.zip file should be located in %DB2TEMPDIR%/JAVA. This is installed as part of the DB2 UDB installation (Client or Server).

6.3 Using the Installation Wizard

You can install the entire SeeBeyond eBusiness Integration Suite, or selected components, using an installation wizard. The setup applications are based upon InstallShield Wizards.

Note: *The instructions presume that the reader is familiar with InstallShield's **Back**, **Next**, **Cancel**, **Yes**, **No**, and **Finish** buttons. Select the appropriate control as you finish entering any required information as each dialog box appears.*

6.4 Installing the e*Xchange Repository Manager GUI

Before you begin:

- You must have Administrator privileges to install the e*Xchange GUIs.
- You should exit all Windows programs, including any anti-virus applications, before running the setup program.

To install the e*Xchange GUIs

- 1 Log into the workstation on which you want to install the GUIs.
- 2 Insert the installation CD into the CD-ROM drive.

If Autorun is enabled, the setup program automatically starts. Otherwise:

- ♦ On the task bar, click the **Start** button, and then click **Run**.
 - ♦ In the **Open** field, type **D:\setup\setup.exe** where **D:** is your CD-ROM drive.
- 3 Follow the online prompts through the **Welcome**, **Software License Agreement**, and **Information** dialog boxes.

Note: *The **Software License Agreement** appears twice during the installation process, and must be accepted to continue with the installation.*

- 4 When the **User Information** dialog box appears, enter the user name and company for which this software is installed, and then click **Next**.
- 5 In the **Please choose the product to install** dialog box, select the **e*Xchange Partner Manager** check box, and then click **Next**.

Note: *Selecting the **e*Gate Integrator** check box installs **e*Gate** components, some of which are required for **e*Xchange**. This guide does not cover installation of those components. For information on installing **e*Gate** components, refer to the **e*Gate Integrator Installation Guide**.*

The **Check Setup Information** dialog box appears.

- 6 In the **Check Setup Information** dialog box, confirm that the **e*Xchange** component has been selected, and then click **Next**.

This launches the **e*Xchange** portion of the setup wizard.

- 7 Follow the online prompts through the **Welcome**, **Software License Agreement**, and **Information** dialog boxes.
- 8 In the **User Information** dialog box, enter the user name and company for which this software is installed, and then click **Next**.
- 9 In the **Choose Destination Location** dialog box, click **Browse** to change the destination folder; otherwise, click **Next** to continue.
- 10 In the **Select Components** dialog box, select *only* **e*Xchange Repository Manager**, and then click **Next**.
- 11 In the **Select Database Server to support e*Xchange Repository Manager** dialog box, select the database type, and then click **Next**.

The following screens depend on the type of database selected. Refer to the following sections:

Database	Section
Oracle	“To install the e*Xchange Repository Manager on Oracle” on page 35
SQL Server	“To install the e*Xchange Repository Manager on SQL Server” on page 35
Sybase	“To install the e*Xchange Repository Manager on Sybase” on page 35
DB2 UDB	“To install the e*Xchange Repository Manager on DB2 UDB” on page 36

To install the e*Xchange Repository Manager on Oracle

- 12 In the **e*Xchange Partner Manager Database Information** dialog box, enter the name and host to identify the database, and then click **Next**.

Note: The name does not need to match the SID for the database..

- 13 In the second **e*Xchange Partner Manager Database Information** dialog box, enter the port number and OracleSID for the database, and then click **Next**.
- 14 In the **Setup Complete** dialog box, select whether you want to reboot the computer now or later, and then click **Finish** to complete the installation process.

Note: You must reboot your computer for the changes to take effect.

To install the e*Xchange Repository Manager on SQL Server

- 15 In the **e*Xchange Partner Manager Database Information** dialog box, enter the name and host to identify the database, and then click **Next**.

Note: The name does not need to match the database name.

- 16 In the second **e*Xchange Partner Manager Database Information** dialog box, enter the port number and database name, and then click **Next**.
- 17 In the **Setup Complete** dialog box, select whether you want to reboot the computer now or later, and then click **Finish** to complete the installation process.

Note: You must reboot your computer for the changes to take effect.

To install the e*Xchange Repository Manager on Sybase

- 18 In the **e*Xchange Partner Manager Database Information** dialog box, enter the name and host to identify the database, and then click **Next**.

Note: The name does not need to match the database name.

- 19 In the second **e*Xchange Partner Manager Database Information** dialog box, enter the port number and database name, and then click **Next**.
- 20 In the **Setup Complete** dialog box, select whether you want to reboot the computer now or later, and then click **Finish** to complete the installation process.

Note: You must reboot your computer for the changes to take effect.

To install the e*Xchange Repository Manager on DB2 UDB

- 21 In the **e*Xchange Partner Manager Database Information** dialog box, enter the name to identify the database, and then click **Next**.

Note: *The name does not need to match the database name.*

- 22 In the second **e*Xchange Partner Manager Database Information** dialog box, enter the database name, and then click **Next**.
- 23 In the **Setup Complete** dialog box, select whether you want to reboot the computer now or later, and then click **Finish** to complete the installation process.

Note: *You must reboot your computer for the changes to take effect.*

Additional Installation Requirements

This chapter describes the process for installing the Validation Rules Builder tool, which is used to create custom validation Collaborations from user-supplied Standard Exchange Format (SEF) files, as well as the installation of the JRE version 1.3.x. The chapter also describes where Java 1.3 and Microsoft Data Access Components (MDAC) are installed automatically.

7.1 Overview

This chapter provides information on the following items:

- System Requirements
- Installing the Validation Rules Builder
- Installing the Java Runtime Environment (version 1.3.x)
- Installing the Microsoft Data Access Components

7.2 System Requirements

- The Validation Rules Builder in e*Xchange requires the Java Runtime Environment (JRE) for Java 1.3.x.

7.3 Installing the Validation Rules Builder

The Validation Rules Builder is a tool for converting X12 and UN/EDIFACT EDI implementation guide files into a format compatible for use with e*Xchange. This conversion tool accepts Standard Exchange Format (SEF) version 1.4 or 1.5 files and converts them into e*Gate Event Type Definition (ETD) files (.ssc files) and Collaboration Rules files (.tsc files).

See the **e*Xchange Partner Manager User's Guide** for more information on the Validation Rules Builder and the files associated with it.

Note: You can install the Validation Rules Builder, in any order prior to using them.

7.3.1 Validation Rules Builder File List

The e*Xchange installation CD contains all files necessary to install the Validation Rules Builder. All files are located in the \setup\ex\ValidationRulesBuilder directory. The Validation Rules Builder in e*Xchange requires the Java Runtime Environment (JRE) for Java 1.3.x in order to run. For information on where to obtain the 1.3.x version JRE, see ["Installing the Java Runtime Environment" on page 40](#).

Table 8 Validation Rules Builder Files

sec_4010_desc
set_4010_desc
ValidationBuilder.jar
ValidationBuilder.properties
PathtoVB.properties
sec and set desc files for UN/EDIFACT
sec and set desc files for X12

Note: There are additional files located in the CD directory that are no longer used. You only need to copy the files listed above.

The following two steps are necessary to install the Validation Rules Builder:

- Copy the installation files from the e*Xchange Installation CD to the VRB folder you create in the eXchange directory.
- Copy the PathtoVB.properties file to your profiles directory and edit it to reflect the path of the other VRB files.

Note: The following instructions are for Windows NT or 2000. If you are installing on a UNIX machine make the appropriate substitution of "/" for "\" in path names.

To copy the installation files

- 1 On a Windows NT or 2000 machine, insert the e*Xchange installation CD into the CD-ROM drive.

- 2 Create a new directory called **Vrb** on the machine on which you want to install the Validation Rules Builder, in the \eXchange root directory.
- 3 Copy only the specified *files* in the following folder on the CD into the **Vrb** folder created in step 2:

setup\applications\ex\ValidationRulesBuilder

Note: Do not copy the folder “jre.” Only copy the specified files within the Validation Rules Builder file on the CD.

To copy and edit the PathtoVB.properties file

Before you can use the Validation Rules Builder you must copy the **PathtoVB.properties** file to your profiles directory and edit it to match the properties for your site.

- 1 Copy the file named **PathtoVB.properties** from the \eXchange\VRB directory to either of the following as necessary:
 - ♦ For Windows NT, copy the file to your profiles directory (C:\Winnt\Profiles\username).
 - ♦ For Windows 2000, copy the file to your profiles directory (C:\Documents and Settings\username)
 - ♦ For UNIX, copy the file to your home directory.

Important: You must use forward slashes “/” for path names in the properties file regardless of whether you are running the Validation Rules Builder on Windows NT, Windows 2000 or UNIX.

- 2 Open the file named **PathtoVB.properties** in any text editor.
- 3 Confirm the path to the location of the **ValidationBuilder.properties** file you copied from the CD.

For example:

VB_PROPS=C:/exchange/vrb

- 4 Save the file.

7.3.2 Configuring the VRB

The ValidationBuilder.properties file contains a number of parameters that you will need to customize before using the Validation Rules Builder. The file is delivered with example parameters, which you will need to review and change if necessary.

See the *e*Xchange Partner Manager User's Guide* for information on configuring the ValidationBuilder.properties file and using the VRB.

7.4 Installing the Java Runtime Environment

To install the Java Runtime Environment Version 1.3.x

For Windows NT, Windows 2000 and Solaris you can run the appropriate executable file for your platform from the e*Xchange installation CD.

If you are using a platform other than Windows NT or Solaris, you can download the JRE for your platform directly from the Java web site at this address:

<http://java.sun.com/products/jdk/1.3/jre>

- 1 From the command line, navigate to the CD directory:

- ♦ For Windows NT or Windows 2000, enter the following command:

```
\setup\applications\ex\ValidationRulesBuilder\jre\  
jre1_2_2-001-win.exe
```

- ♦ For Solaris, enter the following command:

```
\setup\applications\ex\ValidationRulesBuilder\jre\  
Solaris_JRE_1.3.2_05_sparc.bin
```

The Java™ Runtime Environment install is initialized, and the **Software License Agreement** dialog appears.

Note: You can also double-click on the executable file to start the install.

- 2 Accept the License agreement by clicking Yes.
- 3 Choose the destination location for the files via the **Browse** button, and then click **Next**.

The files are installed.

Note: When the installation is complete, a message displays and the install program closes.

- 4 Once you have installed JRE version 1.3.x, navigate to \eGate\Client\Classes, and copy the file

```
egate.jar  
to \jre\1.3\lib\ext.
```

Note: egate.jar is loaded when you install e*Gate. The path \jre\1.3\lib\ext is created when you install JRE version 1.3.x.

Installing the e*Xchange Client for Windows

This chapter describes the process for installing the e*Xchange Client for Windows.

The e*Xchange Client for Windows does not support connecting to a DB2 UDB database. The e*Xchange Web Interface must be used. The installation process for the e*Xchange Web Interface is described in detail in [“Installing the e*Xchange Web Interface” on page 9](#).

You can install the e*Gate and e*Xchange GUIs in any order and at any point in the installation process, since they are not dependent on any other e*Gate or e*Xchange component. Each GUI can be installed on any Windows NT or 2000 machine that contains the appropriate necessary software.

8.1 Overview

This chapter provides information on the following items:

- System Requirements
- Installing the e*Xchange Client for Windows

8.2 System Requirements

The e*Xchange Client for Windows must be installed on a Windows NT or 2000 workstation that contains the Oracle, SQL Server or Sybase database that will be used by the GUI. Additional requirements include:

- Pentium-class CPU, 300 MHz or higher
- Minimum 128 MB RAM
- 70 MB disk space

Driver Requirements

The e*Xchange Client for Windows needs to connect to the e*Xchange database. The table below describes the driver requirements for the supported databases.

Table 9 e*Xchange Client for Windows Driver Requirements

Database	Driver	Install Procedure
Oracle	ODBC	Installed as part of the Oracle installation (Client or Server) 8.1.6 or 8.1.7. For information on configuring the ODBC connection see “Creating the Oracle ODBC Connection” on page 54.
SQL Server	ODBC	Installed as part of the SQL Server installation (Client or Server) 7 or 2000. For information on configuring the ODBC connection see “Creating the SQL Server ODBC Connection” on page 63.
Sybase	ODBC	Install Sybase client software. For information on configuring the ODBC connection, see “Creating the Sybase ODBC Connection” on page 72.
DB2 UDB	Not Supported	

8.3 Using the Installation Wizard

You can install the entire SeeBeyond eBusiness Integration Suite, or selected components, using an installation wizard. The setup applications are based upon InstallShield Wizards.

Note: *The instructions presume that the reader is familiar with InstallShield’s **Back**, **Next**, **Cancel**, **Yes**, **No**, and **Finish** buttons. Select the appropriate control as you finish entering any required information as each dialog box appears.*

8.4 Installing the e*Xchange Client for Windows

Before you begin:

- You must have Administrator privileges to install the e*Xchange Client for Windows.
- You should exit all Windows programs, including any anti-virus applications, before running the setup program.

To install the e*Xchange Client for Windows

- 1 Log into the workstation on which you want to install the GUI.
- 2 Insert the installation CD into the CD-ROM drive.

If Autorun is enabled, the setup program automatically starts. Otherwise:

- ♦ On the task bar, click the **Start** button, and then click **Run**.
 - ♦ In the **Open** field, type **D:\setup\setup.exe** where **D:** is your CD-ROM drive.
- 3 Follow the online prompts through the **Welcome**, **Software License Agreement**, and **Information** dialog boxes.

Note: *The **Software License Agreement** appears twice during the installation process, and must be accepted to continue with the installation.*

- 4 When the **User Information** dialog box appears, enter the user name and company for which this software is installed, and then click **Next**.
- 5 In the **Please choose the product to install** dialog box, select the **e*Xchange Partner Manager** check box, and then click **Next**.

Note: *Selecting the **e*Gate Integrator** check box installs **e*Gate** components, some of which are required for **e*Xchange**. This guide does not cover installation of those components. For information on installing **e*Gate** components, refer to the **e*Gate Integrator Installation Guide**.*

The **Check Setup Information** dialog box appears.

- 6 In the **Check Setup Information** dialog box, confirm that the **e*Xchange** component has been selected, and then click **Next**.

This launches the **e*Xchange** portion of the setup wizard.

- 7 Follow the online prompts through the **Welcome**, **Software License Agreement**, and **Information** dialog boxes.
- 8 In the **User Information** dialog box, enter the user name and company for which this software is installed, and then click **Next**.
- 9 In the **Choose Destination Location** dialog box, click **Browse** to change the destination folder; otherwise, click **Next** to continue.
- 10 In the **Select Components** dialog box, select *only* **e*Xchange Client for Windows**.
- 11 Highlight **e*Xchange Client for Windows** and then click **Change**.

The **Select Sub-components** dialog box appears.

- 12 In the **Select Sub-components** dialog box, select the GUI components to install.

Note: *If you want to install the **eSecurity Manager**, select the **e*Xchange Client for Windows** option, then click **Change** and select **eSecurity Manager** also.*

- 13 Click **Continue** to return to the **Select Components** dialog box, and then click **Next**.
- 14 In the **Select Program Folder** dialog box, review the name of the default program folder for the **e*Xchange Client for Windows** icons; keep or change as needed, and then click **Next**.

The **Check Setup Information** dialog box appears.

- 15 In the **Check Setup Information** dialog box, review the installation information for e*Xchange Client for Windows, and then click **Next**.

The setup program begins installing the files on your machine. When the installation has completed, the **Setup Complete** dialog box appears.

***Note:** You may need to use the scroll bar to view the entire text in the **Check Setup Information** dialog box.*

- 16 In the **Setup Complete** dialog box, click **Finish** to complete the e*Xchange Client for Windows installation.
- 17 In the **Setup Complete** dialog box, select whether you want to reboot the computer now or later, and then click **Finish** to complete the installation process.

***Note:** You must reboot your computer for the changes to take effect.*

Creating the e*Xchange Database Schema—Oracle

This chapter explains how to create the e*Xchange database schema with Oracle.

9.1 Overview

This chapter provides information on the following items:

- System Requirements
- Creating an Oracle Schema via the Install Shield Wizard

Note: *The Install Shield uses the default date format used by e*Xchange: MM/DD/YYYY HH24:MI:SS. If you want to use a different date format, you must perform a manual installation.*

- Creating an Oracle Schema manually
- Creating the Oracle ODBC connection

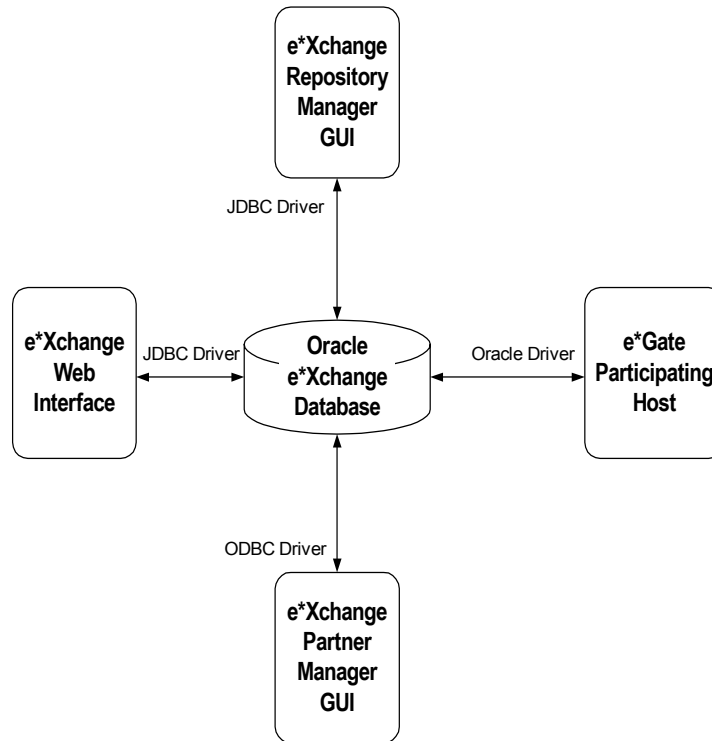
9.2 System Requirements

- The e*Xchange Oracle database schema must be created in an existing Oracle 8i (8.1.6, or 8.1.7) instance. The instance can be created using custom settings as required to handle expected throughput and volume of data stored in the e*Xchange Schema. For requirements associated with the Oracle instance, see the appropriate Oracle user guides.
- The default disk space for the e*Xchange Oracle schema is 490 MB. You should adjust this as necessary, based on the throughput and storage requirements for your enterprise.
- The hard disk requirement for each Oracle 8i product includes 15 MB which is required to install Java Runtime Environment (JRE) and Oracle Universal Installer on the partition in which the operating system is installed.

9.3 Overview of the Oracle e*Xchange Database

The e*Xchange database is the repository for all information about e*Xchange Partner Manager. All other e*Xchange Partner Manager components need to connect to the database to send and/or receive information. The following diagram shows how the various components connect to the Oracle e*Xchange database.

Figure 3 Oracle e*Xchange Database Overview



The drivers need to reside on the machine with the component connecting to the Oracle e*Xchange database.

Table 10 Driver Requirements

Driver	Install Procedure
JDBC	Copy classes12.zip into <EX_HOME>/lib. This file is installed as part of the Oracle installation.
Oracle	Installed as part of the Oracle installation (Client or Server) 8.1.6 or 8.1.7.
ODBC	Installed as part of the Oracle installation (Client or Server) 8.1.6 or 8.1.7. For information on configuring the ODBC connection see “Creating the Oracle ODBC Connection” on page 54.

9.4 Creating an Oracle Schema via Install Shield Wizard

This section describes how to create an Oracle database schema for e*Xchange using the Install Shield Wizard.

Note: *The Install Shield uses the default date format used by e*Xchange: MM/DD/YYYY HH24:MI:SS. If you want to use a different date format, you must do a manual installation.*

To create an Oracle schema

- 1 Run the Install Shield Wizard from the setup program.
- 2 Modify the **init.ora** file.

Important: *After you have created the Oracle schema, you must create an ODBC connection for the database to be able to log into it from the e*Xchange GUIs. See [“Creating the Oracle ODBC Connection” on page 54](#).*

Important: *Installation of the e*Xchange Database Schema deletes any previous versions of the e*Xchange Database Schema created within the same Database Service. If you are upgrading then refer to [“Upgrading the e*Xchange Database Schemas from Version 4.1.2 to 4.5.1” on page 89](#).*

9.5 Installing the Schema

Before you begin:

- Make sure you have Oracle installed. For information specific to the Oracle installation, refer to the Oracle documentation.
- Make sure you have Administrator privileges to install the e*Xchange schema.
- Exit all Windows programs, including any anti-virus applications.
- Verify the administrator user name and password.

9.5.1 Installing the Database Schema from Windows NT or 2000

To install the Database Schema on Windows NT or 2000

- 1 Log in to the machine running the DBMS.
- 2 Insert the installation CD into the CD-ROM drive.

If Autorun is enabled, the setup program automatically starts. Otherwise:

- ♦ On the task bar, click the **Start** button, and then click **Run**.
- ♦ In the **Open** field, type **D:\setup\setup.exe** where **D:** is your CD-ROM drive.

- 3 Follow the online prompts through the **Welcome**, **Software License Agreement**, and **Information** dialog boxes.

Note: *The **Software License Agreement** appears twice during the installation process, and must be accepted to continue with the installation.*

- 4 When the **User Information** dialog box appears, enter the user name and company for which this software is installed, and then click **Next**.
- 5 In the **Please choose the product to install** dialog box, select the **e*Xchange Partner Manager** check box, and then click **Next**.

Note: *Selecting the **e*Gate Integrator** check box installs **e*Gate** components, some of which are required for **e*Xchange**. This guide does not cover installation of those components. For information on installing **e*Gate** components, refer to the **e*Gate Integrator Installation Guide**.*

The **Check Setup Information** dialog box appears.

- 6 In the **Check Setup Information** dialog box, confirm that the **e*Xchange** component has been selected, and then click **Next**.
This launches the **e*Xchange** portion of the setup wizard.
- 7 Follow the online prompts through the **Welcome**, **Software License Agreement**, and **Information** dialog boxes.
- 8 In the **User Information** dialog box, enter the user name and company for which this software is installed, and then click **Next**.
- 9 In the **Choose Destination Location** dialog box, click **Browse** to change the destination folder; otherwise, click **Next** to continue.
- 10 In the **Select Components** dialog box, select the **e*Xchange Database Schema** check box.
- 11 Click **Next**.

Important: *Installation of the **e*Xchange Database Schema** deletes any previously installed **e*Xchange Database Schema**, if the same schema username is specified. If you are upgrading, refer to [“Upgrading the e*Xchange Database Schemas from Version 4.1.2 to 4.5.1” on page 89](#).*

The **Check Setup Information** dialog box appears.

- 12 In the **Check Setup Information** dialog box, review the installation information for the **e*Xchange** back-end components, and then click **Next**.
- 13 In the **Select Database Server to support e*Xchange** dialog box, select **Oracle**, and then click **Next**.

- 14 In the **Database Administrator Information** dialog box, enter the Oracle administrator **Username** and **Password**, and then click **Next**.

Note: By default the Oracle Administrator username is **system** and the password is **manager**.

- 15 In the **Database Schema Owner Information** dialog box, enter an Owner and Password for the database schema, and then click **Next**.

Note: This username must be unique in the Oracle Instance. If it is not unique, then the user is dropped and everything it owns is deleted before the user is recreated.

- 16 In the **Select Database Server Location** dialog box, select **Local** or **Remote**.

- 17 In the **Oracle Specific Info** dialog box, enter an Oracle Service/SID name, and then click **Next**.

Note: If an Oracle Service is detected on your machine, then the name is automatically inserted. This can be over-typed if it is not the correct service name.

- 18 The first **Table Space Information** dialog contains the directory names where the first and second tablespaces will be created. The tablespaces are defined as followed:

- ♦ TSP1 contains the ex_epm_stat_data (company, tp profiles, and so on) and ex_epm_mtrk_data (can grow large as number of messages increases).
- ♦ TSP2 contains the ex_epm_msg_data (message data can grow large as number of messages increases).

Change the default entries if required, and then click **Next**.

Important: The directories will only be created if the Database Server Location is local. If the location is remote, you must ensure that the directories already exist.

Note: The lowest level folder in the path should match the name of the Oracle Service/SID.

- 19 The second **Table Space Information** dialog appears. This contains the directory names for the third and fourth tablespaces.

- ♦ TSP3 contains all indexes.
- ♦ TSP4 contains all message security data.

Change the default entries if required, and then click **Next**. The Database Schema is installed.

- 20 In the **Remote Server Directories Confirmation** dialog, check the information, and then click **Next**.

- 21 In the **Setup Complete** dialog box, click **Finish** to complete the e*Xchange Database Schema installation.

- 22 In the **Setup Complete** dialog box, select whether to reboot the computer now or later, and click **Finish** to complete the installation process.

9.5.2 Modifying the init.ora File for the e*Xchange Database

If you create a new database, you must increase the `open_cursors` parameter for the e*Xchange database to 500. When you open this file, verify that it contains the line specified in step 2, and add it if it is not in the file.

To modify the `init.ora` file

- 1 Navigate to **Oracle home>/admin/<eX database name>/pfile**.
- 2 Open **init.ora** file for the e*Xchange database in any text editor.
- 3 Add the line:

```
open_cursors = 500
```
- 4 Save the file.
- 5 Restart the database.

9.6 Creating an Oracle Schema Manually

This section describes how to manually create an Oracle database schema for e*Xchange.

Note: Before you begin, you must have Oracle installed. Read the Oracle documentation for information specific to the Oracle installation.

To create an Oracle schema

- 1 Copy the installation files from the e*Xchange Installation CD to the e*Xchange root directory.
- 2 Modify the SQL statements with the specific information for your system.
- 3 Run the **ex_install.sql** script to create the schema.
- 4 Modify the **init.ora** file.

Important: After you have created the Oracle schema, you must create an ODBC connection for the database to be able to log into it from the e*Xchange GUIs. See [“Creating the Oracle ODBC Connection” on page 54](#).

Important: Installation of the e*Xchange Database Schema deletes any previously installed e*Xchange Database Schema, if the same schema username is specified. If you are upgrading, refer to [“Upgrading the e*Xchange Database Schemas from Version 4.1.2 to 4.5.1” on page 89](#).

9.6.1 Copy the Installation Files to the e*Xchange Root Directory

To copy the necessary files

- 1 On a Windows NT or 2000 machine, insert the e*Xchange installation CD into the CD-ROM drive.
- 2 Copy the following folder to the e*Xchange root directory on the machine running the DBMS:

```
CD:\setup\ex\database\Oracle
```

The result will be:

```
\eXchange\Oracle
```

Note: All further instructions for creating the Oracle database schema pertain to the files in the directory \eXchange\Oracle.

9.6.2 Modifying SQL Statements

For the Oracle database, you must modify two SQL scripts with information specific to your site. Additionally, there are two other files you can update if you need to increase storage parameters.

Important: If you run the automatic install before the manual install then the *ex_defs.sql* and *ex_intall.sql* files will be merged. Make all the changes described in **"To modify ex_defs.sql" on page 51** to the *ex_install.sql* file.

A \eXchange\Oracle\ex_defs.sql

B \eXchange\Oracle\ex_install.sql

C \eXchange\Oracle\tsp_defs.sql (optional)

D \eXchange\Oracle\epm\epm_defs.sql (optional)

To modify ex_defs.sql

- 1 Open \eXchange\Oracle\ex_defs.sql in any text editor.
- 2 Under **define DATE_FORMAT**, enter the date format that will be used in e*Xchange.

For example:

```
define DATE_FORMAT = "MM/DD/YYYY HH24:MI:SS"
```

Note: This date format must be recognizable by Oracle. Refer to Oracle documentation for possible formats.

- 3 Under **STC eXchange ePM User Info**, replace the default password to use a different password for the schema owner.

For example:

```
-- STC eXchange ePM User Info  
define ADMIN_NAME = "ex_admin"
```

```
define ADMIN_PW = "ex_admin"
```

- 4 Replace TNS_NAME with the database tns name found in the tnsnames.ora file.
- 5 Under **Oracle tablespace info**, replace the default information with the location of the tablespaces for your site. This is listed under your Oracle install.

For example:

```
-- Oracle tablespace info:

define TSP1 = "d:\Oracle\exchange\<db>"
define TSP2 = "d:\Oracle\exchange\<db>"
define TSP3 = "d:\Oracle\exchange\<db>"
define TSP4 = "d:\Oracle\exchange\<db>"
```

Where **d:\Oracle\exchange** is the path to where you want the tablespaces created, and **\db** is your TNS_NAME. The tablespaces contain the following data:

- ♦ TSP1 contains the ex_epm_stat_data (company, tp profiles, and so on) and ex_epm_mtrk_data (can grow large as number of messages increases).
- ♦ TSP2 contains the ex_epm_msg_data (message data can grow large as number of messages increases).
- ♦ TSP3 contains all indexes.
- ♦ TSP4 contains all message security data.

Important: If you use the default tablespace information you must create a directory on the server machine that corresponds to the default location for the tablespace files: **\Oracle\exchange\db**. This folder must be created **before** you run the install script.

- 6 Save and close the file.

To modify ex_install.sql

- 1 Open **\eXchange\Oracle\ex_install.sql** in any text editor.
- 2 Under **Install scripts home dir**, double-check that the path specified for SCRIPT_HOME is where you have copied the files from the CD, and edit the path as necessary.

For example:

```
-- Install scripts home dir
-- Use the following line for release
define SCRIPT_HOME = "/ex/database/Oracle"
```

If you installed e*Xchange on your d: drive, change the path to read:

```
define SCRIPT_HOME = "d:\eXchange\Oracle"
```

Where d: is the drive where you installed e*Xchange.

Note: In UNIX you can omit the drive designation.

- 3 Save and close the file.

To modify `tsp_defs.sql` (optional)

This file contains the tablespace information used to create the database schema used by e*Xchange. You can choose to use the default information in this file or make changes to reflect the requirements of your site.

Important: If you use the default tablespace information you must create a directory on the local machine that corresponds to the default location for the tablespace files: `\Oracle\exchange\dfs`. Create this folder **before** you run the install script.

- 1 Open `\Oracle\tsp_defs.sql` in any text editor.
- 2 Under **ePM eXchange tablespace info**, replace the default information with the tablespace size information appropriate for your site.

An example of the default information is shown below:

```
-- STC ePM eXchange tablespace info

define TSP_dname1 = "ex_epm_stat_data"
define TSP2 = "&TSP1/ex_epm_stat_data.dbf"
define TSP3 = "30M"
define TSP2 = "20M"
define TSP3 = "20M"
```

- 3 Save and close the file.

To modify `epm_defs.sql` (optional)

This file contains the table sizing information used to create the e*Xchange tables. You can choose to use the default information in this file or make changes to reflect the requirements of your site.

- 1 Navigate to `eXchange\Oracle\epm\`.
- 2 Open `epm_defs.sql` in any text editor.
- 3 Edit the extent sizes as necessary.
- 4 Save and close the file.

9.6.3 Running the `ex_install.sql` Script

Once you have edited the relevant files, run `ex_install.sql`.

Important: You must be logged in with the database administrator to run the install script.

To run the `ex_install.sql` script

- 1 Open SQL Plus, and log in as the database administrator, using the `TNS_NAME` (database name) as the Host String.
- 2 At the `SQL>` prompt type the command:

```
@<path to ex_install.sql>
```

where

path to `ex_install.sql` is the name and location of the `ex_install.sql` file that was copied from the e*Xchange installation CD-ROM.

For example:

```
@c:\exchange\Oracle\ex_install.sql
```

3 Press Enter.

The schema is created, and is owned by the specified user.

9.6.4 Modifying the init.ora File for the e*Xchange Database

If you create a new database, you must increase the `open_cursors` parameter for the e*Xchange database to 500. When you open this file, verify that it contains the line specified in step 2, and add it if it is not in the file.

To modify the `init.ora` file

- 1** Navigate to **Oracle home>/admin/<eX database name>/pfile**
- 2** Open **init.ora** file for the e*Xchange database in any text editor.
- 3** Add the line:

```
open_cursors = 500
```
- 4** Save the file.
- 5** Restart the database.

9.7 Creating the Oracle ODBC Connection

The e*Xchange GUIs require the installation of an ODBC driver in order to connect to the Oracle database. The ODBC driver must be installed on the same machine as the e*Xchange GUIs.

9.7.1 Installing the Latest Drivers

e*Xchange version 4.5.1 supports the latest ODBC drivers. These drivers can be obtained from http://technet.Oracle.com/software/utilities/software_index.htm. The latest versions available as of publication time are:

- Version 8.1.6.3.0 for Net 8 Client 8.1.6.0.0 (ODBC Version 3.51)
- Version 8.1.5.7.0 for Net 8 Client 8.1.5.0.5 (ODBC Version 3.51)

Install the version appropriate for the appropriate version of Oracle you are running. Once you have downloaded and extracted the necessary files, see the `readme.txt` file provided by Oracle for specific installation instructions. You will need to have access to the Universal Installer in order to install the new driver.

Note: To check what version Oracle driver you have, select the **Drivers** tab on the ODBC Data Source Administrator, located in the Control Panel. Once you have completed the installation, refer to this tab to confirm that it was successful. The version number on the Drivers tab is displayed in a slightly different format than that

shown on the Oracle web page. For example, on the Web page, the version “8.1.5.7.0” will display as “8.01.57.00” in the ODBC Data Source Administrator.

9.7.2 Creating the ODBC Connection

To create the ODBC connection

Perform the following steps on the machine running the GUIs.

- 1 On the task bar, click the **Start** button, point to **Settings**, and then click **Control Panel**.
- 2 Double-click **ODBC Data Sources** to open the **ODBC Data Sources Administrator** dialog box.

Note: *In Windows 2000 go to **Settings**, **Control Panel**, **Administrative Tools**, **Data Sources (ODBC)**.*

- 3 In the **ODBC Data Sources Administrator** dialog box, select the **System DSN** tab.
- 4 On the **System DSN** tab, click **Add**.

The **Create New Data Source** dialog box appears.

- 5 Double-click **Oracle ODBC Driver**.

The **Oracle8 ODBC Driver Setup** dialog box appears. This dialog box may appear slightly different, depending upon the driver version that is installed.

- 6 In the **Oracle8 ODBC Driver Setup** dialog box, in the **Data Source Name** field, type a logical name for the ODBC driver.

You will use this name to log in to the e*Xchange GUIs.

- 7 In the **Description** box, enter a description to distinguish it from the others when selecting it from a list.
- 8 In the **Service Name** box in the **Data Source** area, type the service name for the e*Xchange database.

Note: *You can obtain the database service name from your database administrator. For all other fields in this dialog box, use the default values or leave them blank.*

- 9 Clear the box labeled **Enable Query Timeout**.

Important: *If you have installed Versions 8.1.6.2.0 or 8.1.5.7.0, you must select the **Application** tab and clear the box labeled **Enable Query Timeout**.*

- 10 Click **OK** to close the dialog box and return to the **ODBC Data Source Administrator** dialog box.
- 11 Click **OK** to install the driver.

Creating the e*Xchange Database—SQL Server

This chapter explains how to create the e*Xchange database with SQL Server.

10.1 Overview

This chapter provides information on the following items:

- System Requirements
- Creating a SQL Server database via the Install Shield Wizard
- Creating a SQL Server database manually
- Creating the SQL Server ODBC connection
- Uninstalling the SQL Server database

10.2 System Requirements

The e*Xchange SQL Server database must be created in an existing SQL Server 7.0 or SQL Server 2000 database. For requirements associated with the SQL Server instance, see the appropriate SQL Server user guides.

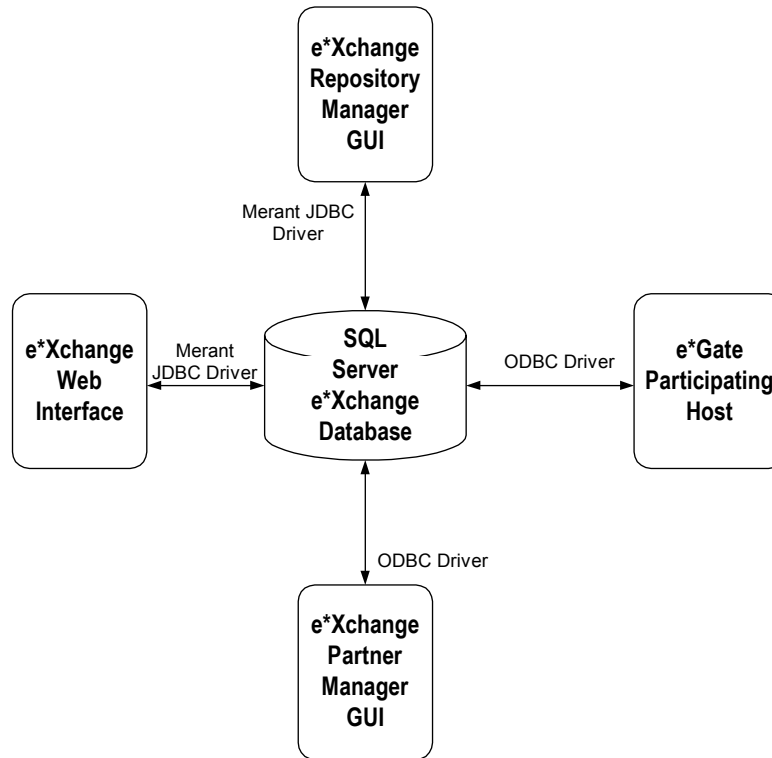
Important: *When creating the SQL Server 2000 database, make sure the data source has been set to verify the authenticity of the login ID using a login ID and password entered by the user.*

Note: *SQL Server support is available for all operating systems other than Compaq Tru64.*

10.3 Overview of the SQL Server e*Xchange Database

The e*Xchange database is the repository for all information about e*Xchange Partner Manager. All other e*Xchange Partner Manager components need to connect to the database to send and/or receive information. The following diagram shows how the various components connect to the Oracle e*Xchange database.

Figure 4 SQL Server e*Xchange Database Overview



The drivers need to reside on the machine with the component connecting to the SQL Server e*Xchange database.

Table 11 Driver Requirements

Driver	Install Procedure
Merant JDBC	Automatically installed by the e*Xchange component.
ODBC	Installed as part of the SQL Server installation (Client or Server) 7 or 2000. For information on configuring the ODBC connection see “Creating the SQL Server ODBC Connection” on page 63.

10.4 Creating a SQL Server Database via Install Shield Wizard

This section describes how to create a SQL Server database for e*Xchange using the Install Shield Wizard.

Note: Before you begin, you must have SQL Server installed. Read the SQL Server documentation for information specific to the SQL Server installation.

To create a SQL Server database

- Run the Install Shield® Wizard from the setup program.

Important: After you have created the SQL Server database, you must create an ODBC connection for the database to be able to log into it from the e*Xchange GUIs. See [“Creating the SQL Server ODBC Connection” on page 63](#).

Important: The installation of the e*Xchange database will not complete successfully if you use the same username and/or database name that already exists on the server. If you are upgrading, refer to [“Upgrading the e*Xchange Database Schemas from Version 4.1.2 to 4.5.1” on page 89](#).

10.5 Installing the Database

Before you begin:

- You must have Administrator privileges to install the e*Xchange database.
- You should exit all Windows programs, including any anti-virus applications, before running the setup program.
- Verify your e*Gate registry host name, schema name, control broker logical name, and the administrator user name and password.

10.5.1 Installing the Database on Windows NT or 2000

To install the Database on Windows NT or 2000

- 1 Log in to the machine running the DBMS or client.
- 2 Insert the installation CD into the CD-ROM drive.
If Autorun is enabled, the setup program automatically starts. Otherwise:
 - ♦ On the task bar, click the **Start** button, and then click **Run**.
 - ♦ In the **Open** field, type **D:\setup\setup.exe** where **D:** is your CD-ROM drive.
- 3 Follow the online prompts through the **Welcome**, **Software License Agreement**, and **Information** dialog boxes.

Note: *The **Software License Agreement** appears twice during the installation process, and must be accepted to continue with the installation.*

- 4 When the **User Information** dialog box appears, enter the user name and company for which this software is installed, and then click **Next**.
- 5 In the **Please choose the product to install** dialog box, select the **e*Xchange Partner Manager** check box, and then click **Next**.

Note: *Selecting the **e*Gate Integrator** check box installs **e*Gate** components, some of which are required for **e*Xchange**. This guide does not cover installation of those components. For information on installing **e*Gate** components, refer to the **e*Gate Integrator Installation Guide**.*

The **Check Setup Information** dialog box appears.

- 6 Confirm that the **e*Xchange** component has been selected, and then click **Next**.
This launches the **e*Xchange** portion of the setup wizard.
- 7 Follow the online prompts through the **Welcome**, **Software License Agreement**, and **Information** dialog boxes.
- 8 In the **User Information** dialog box, enter the user name and company for which this software is installed, and then click **Next**.
- 9 In the **Choose Destination Location** dialog box, click **Browse** to change the destination folder; otherwise, click **Next** to continue.
- 10 In the **Select Components** dialog box, select the **e*Xchange Database Schema** check box.
- 11 Click **Next**.

The **Check Setup Information** dialog box appears.

- 12 In the **Check Setup Information** dialog box, review the installation information for the **e*Xchange** back-end components, and then click **Next**.

The **About the Database Schema** dialog box appears.

- 13 Click **Next**.
- 14 In the **Select Database Server to support e*Xchange** dialog box, select **SQL Server** then click **Next**.
- 15 In the **Database Administrator Information** dialog box, enter the **SQL Server administrator Username** and **Password**, and then click **Next**.
- 16 In the **Database Owner Information** dialog box, enter the **Database Owner Username** and **Password**, and then click **Next**.

Important: *The owner for the database and the database name cannot already exist in the Server. They are created as part of the installation process.*

- 17 In the **Select Database Server Location** dialog, select either **Local** or **Remote** for the database location.
- 18 In the **SQL Server Specific Info** dialog box, enter a **Host** name, and **Database** name. Then click **Next**.
- 19 The first **File Group/Datafile Information** dialog appears. Enter a location for the following file groups/datafiles and then click **Next**.
 - ♦ Prim—the primary filegroup.
 - ♦ Stat_data—contains the company and trading partner profile as well as the user data. Will only grow as the company, trading partners, and user data increases.
- 20 The second **File Group/Datafile Information** dialog appears. Enter a location for the following file groups/datafiles and then click **Next**.
 - ♦ Mtrk_data—contains the message tracking data. Will increase as the number of messages increase.
 - ♦ Msg_data—contains the actual message data. Can increase quite significantly depending on the size and volume of the messages.
- 21 The third **File Group/Datafile Information** dialog appears. Enter a location for the following file groups/datafiles and then click **Next**.
 - ♦ Sec_data—contains the security message data used primarily in RosettaNet.
 - ♦ Stat_indx—contains the Stat_data indexes.
- 22 The fourth **File Group/Datafile Information** dialog appears. Enter a location for the following file groups/datafiles and then click **Next**.
 - ♦ Mtrk_indx—contains the Mtrk_data indexes.
 - ♦ Msg_indx—contains the Msg_data indexes.
- 23 The fifth **File Group/Datafile Information** dialog appears. Enter a location for the following file groups/datafiles and then click **Next**.
 - ♦ Log—for logging.

An information message appears to show that ss_ex_install.bat has been launched successfully.
- 24 Click **OK**.
- 25 In the **Setup Complete** dialog box, click **Finish** to complete the e*Xchange Database installation.

10.6 Creating a SQL Server Database Manually

This section describes how to create a SQL Server database for e*Xchange on a Windows NT or 2000 machine. You can create the database either before or after installing the GUIs. However, if you install the database first, you must copy the SQL

Server folder as described in **“Copying the Installation Files to the e*Xchange Root Directory” on page 61**, to a location other than the e*Xchange root directory, as it will not yet be installed.

Important: Before you begin, you must have SQL Server installed. Read the SQL Server documentation for information specific to the SQL Server installation.

Important: The installation of the e*Xchange database will not complete successfully if you use the same username and/or database name that already exists on the server. If you are upgrading, refer to **“Upgrading the e*Xchange Database Schemas from Version 4.1.2 to 4.5.1” on page 89**.

To create a SQL Server database

- 1 Copy the installation files from the e*Xchange Installation CD to the e*Xchange root directory.
- 2 Create and configure the database.

Important: After you have created the SQL Server database, you must create an ODBC connection for the database to be able to log into it from the e*Xchange GUIs. See **“Creating the SQL Server ODBC Connection” on page 63**.

10.6.1 Copying the Installation Files to the e*Xchange Root Directory

The e*Xchange SQL Server database can be installed from either the Client or the Server.

To copy the necessary files

- On the machine from which you want to install the e*Xchange SQL Server database, copy the following folder on the CD to the e*Xchange root directory:

CD:\setup\ex\database\sqlserver

The result will be:

\eXchange\sqlserver

10.6.2 Modifying SQL Statements

For the SQL Server database, you must modify two SQL scripts with information specific to your site.

Important: If you run the automatic install before the manual install then the default `ss_ex_install.sql` will have been replaced by one with values inserted via the install wizard.

A \eXchange\SQLServer\ss_ex_install.sql

B \eXchange\SQLServer\ss_ex_install.bat

To modify `ss_ex_install.sql`

- 1 Open \eXchange\SQLServer\ss_ex_install.sql in any text editor.

- 2 Update all references to “exchange” to the new database name.
- 3 Change the “FILENAME=” portion for each filegroup to reflect where the data files need to be stored.
 - A EX_PRIM - the primary filegroup.
 - B EX_EPM_STAT_DATA - contains the company and trading partner profile as well as the user data. Will only grow as the company, trading partners, and user data increases.
 - C EX_EPM_MTRK_DATA - contains the message tracking data. Will increase as the number of messages increase.
 - D EX_EPM_MSG_DATA - contains the actual message data. Can increase quite significantly depending on the size of the messages.
 - E EX_EPM_SEC_MSG_DATA - contains the security message data used primarily in Rosettanet.
 - F EX_EPM_STAT_INDX - contains the EX_EPM_STAT_DATA indexes.
 - G EX_EPM_MTRK_INDX - contains the EX_EPM_MSG_DATA indexes.
 - H EX_EPM_MSG_INDX - contains the EX_EPM_MSG_DATA and EX_EPM_SEC_MSG_DATA indexes.
 - I EX_LOG - for logging.
- 4 Modify all occurrences of ‘ex_admin’, ‘ex_admin’ to reflect the database owner user name and password.
- 5 Save and close the file.

To modify ss_ex_install.bat

- 1 In the e*Xchange SQL Server directory on your local drive:
 \exchange\sqlserver
 locate the file **ss_ex_install.bat**.
- 2 Open the file in any text editor and check that the names you specified for the database and the server are referenced in the file. Make changes as required.
 - A Set “__HOST=” to the host name
 - B Set “__USER=” to the eXchange owner
 - C Set “__PASSWORD=” to the eXchange owner password
 - D Set “__DATABASE=” to the name of the database
 - E Set “__DBADMINUSER=” to the database administrator
 - F Set “__DBADMINPASSWORD=” to the database administrator password
- 3 Save any changes, and close the text file.

10.6.3 Running ss_ex_install.bat.

Once the relevant files have been updated you can run the install script.

To run `ss_ex_install.bat`

- Double-click the file `ss_ex_install.bat` that you just modified.

Running this file sets up the tables and procedures in the database.

10.7 Creating the SQL Server ODBC Connection

The e*Xchange GUIs require the installation of the SQL Server ODBC driver in order to connect to the SQL Server database. The ODBC driver must be installed on the same machine as the e*Xchange GUIs.

Important: *If you are using a SQL Server database on Solaris, you will need to use either a pure JDBC driver or the JDBC-ODBC Bridge. If you are using the Bridge, the ODBC driver managers might name their libs `libodbcinst.so` and `libodbc.so`. The JDBC-ODBC Bridge expects these libraries to be named `libodbcinst.so.1` and `libodbc.so.1`, so symbolic links for these names must be created. See the Java web page for more information.*

To create the ODBC connection

The database that you are connecting to must be running before you can create an ODBC connection to it.

- 1 Start the SQL Server database for which you are creating the ODBC connection.
- 2 On the task bar, click the **Start** button, point to **Settings**, and then click **Control Panel**.
- 3 Double-click **ODBC Data Sources** to open the **ODBC Data Sources Administrator** dialog box.
- 4 In the **ODBC Data Sources Administrator** dialog box, select the **System DSN** tab.
- 5 Click **Add**.

The **Create New Data Source** dialog box appears.

- 6 Select **SQL Server**, and click **Finish**.

The **Create a New Data Source to SQL Server** dialog box appears.

- 7 In the **Name** box, type the name of the data source. This can be any name.
- 8 (Optional) In the **Description** box, type the description of the data source.
- 9 From the **Server** list, select the server to which you want to connect, and click **Next**.
The **Microsoft SQL Server DSN Configuration** dialog box appears.
- 10 Select the **"With SQL Server authentication..."** radio button.

- 11 In the **Login ID** and **Password** boxes, type “**ex_admin**” or the name specified in the installation scripts.

This is the login ID and password you will use when logging into this database in the e*Xchange GUIs.

- 12 Click **Client Configuration**.

The **Add Network Library Configuration** dialog box appears.

- 13 In the **Network Libraries** section, verify that **TCP/IP** is selected, and click **OK** to return to the previous dialog box.

- 14 Click **Next**.

The **Microsoft SQL Server DSN Configuration** (change default database) dialog box appears.

- 15 Select **Change the default database to**, and then type the name of the database you created (exchange).

- 16 Clear **Use ANSI quoted identifiers** and **Use ANSI nulls, paddings and warnings**, and then click **Next**.

The **Create a New Data Source to SQL Server** dialog box appears.

- 17 Accept the defaults.

***Note:** Make sure that **Use regional settings when outputting currency, numbers, dates and times** remains cleared.*

- 18 Click **Finish**.

The **ODBC Microsoft SQL Server Setup** dialog box appears.

- 19 Click **Test Data Source**.

The **SQL Server ODBC Data Source Test** dialog box appears.

- 20 Click **OK** on both of the testing dialog boxes to return to the **ODBC Data Source Administrator**.

- 21 Double-check that the database connection you just set up is listed, and then click **OK** to close the **ODBC Data Source Administrator**.

10.8 Uninstalling the SQL Server Database

If at any point you want to uninstall the SQL Server database that you created for e*Xchange, you must do it via SQL Server itself. Uninstalling e*Xchange does not remove the SQL Server database.

Creating the e*Xchange Database—Sybase

This chapter explains how to create the e*Xchange database with Sybase.

11.1 Overview

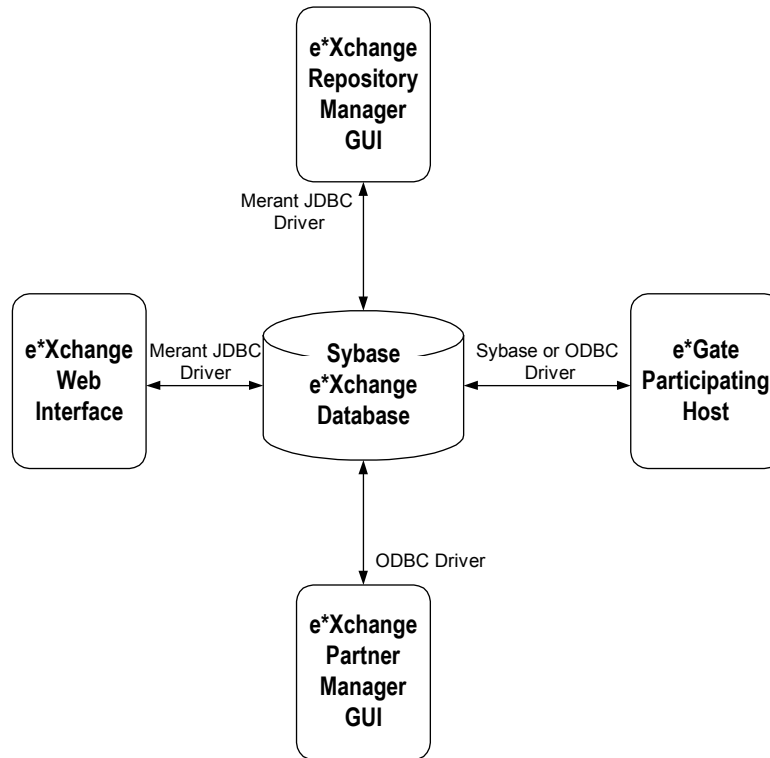
This chapter provides information on the following items:

- Creating a Sybase database via the Install Shield Wizard
- Creating a Sybase database manually
- Creating the Sybase ODBC connection
- Uninstalling the Sybase database

11.2 Overview of the Sybase e*Xchange Database

The e*Xchange database is the repository for all information about e*Xchange Partner Manager. All other e*Xchange Partner Manager components need to connect to the database to send and/or receive information. The following diagram shows how the various components connect to the Oracle e*Xchange database.

Figure 5 Sybase e*Xchange Database Overview



The drivers need to reside on the machine with the component connecting to the Sybase e*Xchange database.

Table 12 Driver Requirements

Driver	Install Procedure
JDBC	Installed automatically by the e*Xchange Web Interface or e*Xchange Repository Manager installation.
Sybase	Install Sybase client software.
ODBC	Install Sybase client software. For information on configuring the ODBC connection, see “Creating the Sybase ODBC Connection” on page 72.

11.3 Creating an Sybase Database via Install Shield Wizard

This section describes how to create an Sybase database for e*Xchange using the Install Shield® Wizard.

Note: *Before you begin, you must have Sybase installed. Read the Sybase documentation for information specific to the Sybase installation.*

Important: *A second e*Xchange database cannot be created within the same server due to a conflict with device file names.*

Follow this step to create a Sybase database

- Run the Install Shield® Wizard from the setup program.

11.4 Installing the Database

Before you begin:

- You must have Administrator privileges to install the e*Xchange database.
- Exit all Windows programs, including any anti-virus applications.

11.4.1 Installing the Database from Windows NT or 2000

To install the Database from Windows NT or 2000

- 1 Log in to the machine running the DBMS, or you can install remotely if the remote machine has the Sybase client installed.
- 2 Insert the installation CD into the CD-ROM drive.

If Autorun is enabled, the setup program automatically starts. Otherwise:

- ♦ On the task bar, click the **Start** button, and then click **Run**.
 - ♦ In the **Open** field, type **D:\setup\setup.exe** where **D:** is your CD-ROM drive.
- 3 Follow the online prompts through the **Welcome**, **Software License Agreement**, and **Information** dialog boxes.

Note: *The **Software License Agreement** appears twice during the installation process, and must be accepted to continue with the installation.*

- 4 When the **User Information** dialog box appears, enter the user name and company for which this software is installed, and then click **Next**.

- 5 In the **Please choose the product to install** dialog box, select the **e*Xchange Partner Manager** check box, and then click **Next**.

Note: *Selecting the e*Gate Integrator check box installs e*Gate components, some of which are required for e*Xchange. This guide does not cover installation of those components. For information on installing e*Gate components, refer to the **e*Gate Integrator Installation Guide**.*

The **Check Setup Information** dialog box appears.

- 6 In the **Check Setup Information** dialog box, confirm that the **e*Xchange** component has been selected, and then click **Next**.

This launches the **e*Xchange** portion of the setup wizard.

- 7 Follow the online prompts through the **Welcome**, **Software License Agreement**, and **Information** dialog boxes.
- 8 In the **User Information** dialog box, enter the user name and company for which this software is installed, and then click **Next**.
- 9 In the **Choose Destination Location** dialog box, click **Browse** to change the destination folder; otherwise, click **Next** to continue.
- 10 In the **Select Components** dialog box, select the **e*Xchange Database Schema** check box.
- 11 Click **Next**.

The **Check Setup Information** dialog box appears.

- 12 In the **Check Setup Information** dialog box, review the installation information for the e*Xchange back-end components, and then click **Next**.
- 13 In the **Select Database Server to support e*Xchange** dialog box, select Sybase then click **Next**.
- 14 In the **Database Administrator Information** dialog box, enter the *Sybase* administrator **Username** and **Password**, and then click **Next**.

Note: *The password must be at least 6 characters.*

- 15 In the **Database Owner Information** dialog box, enter the Database Owner **Username** and **Password**, and then click **Next**.

Important: *The owner for the database is created as part of the installation process.*

- 16 In the **Select Database Server Location** dialog, select either **Local** or **Remote** for the database location.
- 17 In the **Sybase Specific Info** dialog box, enter a **Host** name, and **Database** name. Then click **Next**.

Note: *The installation creates a database with this name.*

- 18 The first **File Group/Datafile Information** dialog appears. Enter a location for the following file groups/datafiles and then click **Next**.
 - ♦ Prim—the primary filegroup.
 - ♦ Stat_data—contains the company and trading partner profile as well as the user data. Will only grow as the company, trading partners, and user data increases.
- 19 The second **File Group/Datafile Information** dialog appears. Enter a location for the following file groups/datafiles and then click **Next**.
 - ♦ Mtrk_data—contains the message tracking data. Will increase as the number of messages increase.
 - ♦ Msg_data—contains the actual message data. Can increase quite significantly depending on the size of the messages.
- 20 The third **File Group/Datafile Information** dialog appears. Enter a location for the following file groups/datafiles and then click **Next**.
 - ♦ Sec_data—contains the security message data used primarily in Rosettanet.
 - ♦ Stat_indx—contains the Stat_data indexes.
- 21 The fourth **File Group/Datafile Information** dialog appears. Enter a location for the following file groups/datafiles and then click **Next**.
 - ♦ Mtrk_indx—contains the Mtrk_data indexes.
 - ♦ Msg_indx—contains the Msg_data indexes.
- 22 The fifth **File Group/Datafile Information** dialog appears. Enter a location for the following file groups/datafiles and then click **Next**.
 - ♦ Log—for logging.

An information message appears to show that **sy_ex_install.bat** has been launched successfully.
- 23 Click **OK**.
- 24 In the **Setup Complete** dialog box, click **Finish** to complete the e*Xchange Database installation.

11.5 Creating a Sybase Database Manually

The following section provides you with instructions for creating a Sybase database for e*Xchange. You can create the database either before or after installing the e*Xchange GUIs.

Important: Before you begin, you must have Sybase installed. Read the Sybase documentation for information specific to the Sybase installation.

Important: A second e*Xchange database cannot be created within the same server due to a conflict with device file names.

To create a Sybase database

- 1 Copy the installation files from the e*Xchange Installation CD to the e*Xchange root directory.
- 2 Modify files containing the database name.
- 3 Modify files containing the user name and password.
- 4 Modify file containing reference to the server.
- 5 Modify and run the installation file.

Important: After you have created the Sybase database, you must create an ODBC connection for the database to be able to log into it from the e*Xchange GUIs. See [“Creating the Sybase ODBC Connection”](#) on page 72.

11.5.1 Copying the Installation Files to the e*Xchange Root Directory

Before you run the installation, you must copy the files to your own directory so that they can be modified.

To copy the necessary files

- On the machine from which you want to install the e*Xchange Sybase database, copy the following folder on the CD to the e*Xchange root directory:

CD:\setup\ex\database\sybase

The result will be:

\eXchange\sybase

11.5.2 Modifying SQL Statements

For the Sybase database, you must modify two SQL scripts with information specific to your site.

Important: If you run the automatic install before the manual install then the default *ss_ex_install.sql* will have been replaced by one with values inserted via the install wizard.

A \eXchange\sybase\sy_ex_install.sql

B \eXchange\sybase\sy_ex_install.bat

To modify ss_ex_install.sql

- 1 Open \eXchange\Sybase\sy_ex_install.sql in any text editor.
- 2 Update all references to “exchange” to the new database name.
- 3 Change the “FILENAME=” portion for each filegroup to reflect where the data files need to be stored.
 - A** EX_PRIM - the primary filegroup.

- B EX_EPM_STAT_DATA - contains the company and trading partner profile as well as the user data. Will only grow as the company, trading partners, and user data increases.
 - C EX_EPM_MTRK_DATA - contains the message tracking data. Will increase as the number of messages increase.
 - D EX_EPM_MSG_DATA - contains the actual message data. Can increase quite significantly depending on the size of the messages.
 - E EX_EPM_SEC_MSG_DATA - contains the security message data used primarily in Rosettanet.
 - F EX_EPM_STAT_INDX - contains the EX_EPM_STAT_DATA indexes.
 - G EX_EPM_MTRK_INDX - contains the EX_EPM_MSG_DATA indexes.
 - H EX_EPM_MSG_INDX - contains the EX_EPM_MSG_DATA and EX_EPM_SEC_MSG_DATA indexes.
 - I EX_LOG - for logging.
- 4 Modify all occurrences of 'ex_admin', 'ex_admin' to reflect the database owner user name and password.
 - 5 Save and close the file.

11.5.3 Configuring the Database

Follow the steps below to create and configure the Sybase database.

To modify sy_ex_install.bat

- 1 In the e*Xchange Sybase directory on your local drive:
 \exchange\sybase
 locate the file **sy_ex_install.bat**.
- 2 Open the file in any text editor and check that the names you specified for the database and the server are referenced in the file. Make changes as required.
 - A Set "__HOST=" to the host name
 - B Set "__USER=" to the eXchange owner
 - C Set "__PASSWORD=" to the eXchange owner password

Note: The password must be at least 6 characters.

- D Set "__DATABASE=" to the name of the database
 - E Set "__DBADMINUSER=" to the database administrator
 - F Set "__DBADMINPASSWORD=" to the database administrator password
- 3 Save any changes, and close the text file.

11.5.4 Configuration Changes to the Sybase Server

Configuration changes to the Sybase server include:

- Updating **cis cursor rows** from the default value of 50 to 500
- Updating **number of devices** from the default value of 10 to 100

11.6 Creating the Sybase ODBC Connection

The e*Xchange GUIs require the installation of the Sybase ODBC driver in order to connect to the Sybase database. The ODBC driver must be installed on the same machine as the e*Xchange GUIs. You can install the driver when you install the Sybase Client software.

To create the ODBC connection

The database must be running before you can create an ODBC connection to it.

- 1 Start the Sybase database for which you are creating the ODBC connection.
- 2 On the task bar, click the **Start** button, point to **Settings**, and then click **Control Panel**.
- 3 Double-click **Administrative Tools**, and then **Data Sources (ODBC)**, to open the **ODBC Data Source Administrator** dialog box.
- 4 In the **ODBC Data Source Administrator** dialog box, select the **System DSN** tab.
- 5 Click **Add**.

The **Create New Data Source** dialog box appears.

- 6 Select **Sybase System 11** and click **Finish**.

The **ODBC Sybase Driver Setup** dialog box appears.

- 7 In the **Data Source Name** box, type the name of the data source you created.
- 8 (Optional) In the **Description** box, type the description of the data source.
- 9 In the **Server Name** box, type the name of the server where you installed the database.
- 10 In the **Database Name** box, type the name of the database for which you are creating the connection.
- 11 Click **OK**.
- 12 Double-check that the database connection you just set up is listed, and then click **OK** to close the **ODBC Data Source Administrator**.

11.7 Uninstalling the Sybase Database

If at any point you want to uninstall the Sybase database that you created for e*Xchange, you must do it via Sybase itself. Uninstalling e*Xchange does not remove the Sybase database.

Creating the e*Xchange Database—DB2 UDB

This chapter explains how to create the e*Xchange database with DB2 UDB.

12.1 Overview

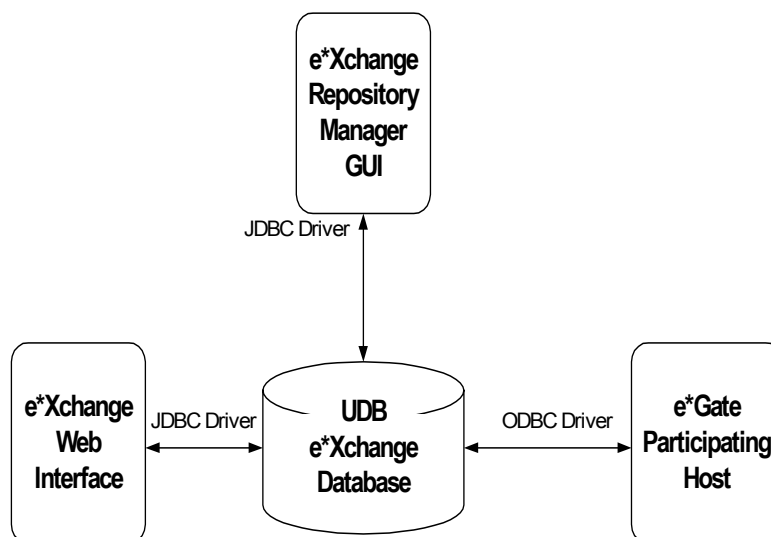
This chapter provides information on the following items:

- Full install via the Install Shield Wizard
- Partial install via the Install Shield Wizard
- Minimal install via the Install Shield Wizard
- Manual install
- Creating the DB2 UDB ODBC connection
- Uninstalling the DB2 UDB database

12.2 Overview of the DB2 UDB e*Xchange Database

The e*Xchange database is the repository for all information about e*Xchange Partner Manager. All other e*Xchange Partner Manager components need to connect to the database to send and/or receive information. The following diagram shows how the various components connect to the DB2 UDB e*Xchange database.

Figure 6 DB2 UDB e*Xchange Database Overview



The drivers need to reside on the machine with the component connecting to the SQL Server e*Xchange database.

Table 13 Driver Requirements

Driver	Install Procedure
JDBC	The db2java.zip file should be located in %DB2TEMPDIR%/JAVA. This is installed as part of the DB2 UDB installation (Client or Server).
ODBC	Installed as part of the DB2 UDB installation (Client or Server). For information on configuring the ODBC connection see “Creating the DB2 UDB ODBC Connection” on page 85 .

Important: The e*Xchange Web Interface and the e*Gate Schema for e*Xchange cannot run on the same machine. For more information see [“Installing the Web Interface and e*Gate Schema for e*Xchange” on page 76](#).

Installing the Web Interface and e*Gate Schema for e*Xchange

The Participating Host running the e*Gate Schema for e*Xchange and the Web Interface cannot run on the same machine. If both components have been installed you can run the e*Gate Schema for e*Xchange without making any configuration changes. However, to run the Web Interface, you need to do the following:

- 1 Open %DB2TEMPDIR%/db2cli.ini in any text editor.
- 2 Add a semicolon in front of LONGDATACOMPAT=1.
- 3 Save the file.

Installing e*Xchange Repository Manager

The file **udbtools.class** file is installed in the %DB2TEMPDIR%/function directory when installing e*Xchange database schema on a local machine. If you use one of the remote install options, the file needs to be copied to the correct location on the DB2 UDB server.

If this file is not copied to the correct location, then the import/export and archive/dearchive operations will not function correctly.

12.3 Creating a DB2 UDB Database via the Install Wizard

The following section provides you with instructions for creating a DB2 UDB database schema for e*Xchange. The following install procedures are available

- Full install—Can only be performed locally on the server. Installs the tablespaces, the database, and the e*Xchange database objects (tables and indexes). For more information, see [“Creating the e*Xchange DB2 UDB database \(full install\) via the Install Wizard” on page 77](#).
- Partial Install—Can be performed locally or remotely. Requires the database is created before the e*Xchange installation. Installs the tablespaces and the e*Xchange database objects (tables and indexes). For more information, see [“Creating e*Xchange DB2 UDB Tablespaces and Database objects \(partial install\) via Install Shield Wizard” on page 79](#)
- Minimal install—Can be performed locally or remotely. Requires the database and tablespaces are created before the e*Xchange installation. Installs only the e*Xchange database objects (tables and indexes). For more information, see [“Creating the e*Xchange DB2 UDB Database Objects \(minimal install\) via Install Shield Wizard” on page 81](#)

Important: Before you begin, you must have DB2 UDB installed. Read the DB2 UDB documentation for information specific to the DB2 UDB installation.

12.3.1 Creating the e*Xchange DB2 UDB database (full install) via the Install Wizard

This section describes how to create an DB2 UDB database, tablespaces, and e*Xchange database objects (tables and indexes) for e*Xchange using the Install Shield® Wizard.

Note: This installation must be run locally.

Installing the Database

Before you begin:

- You must manually create the eXchange database owner on the operating system level. Refer to the operating system user guide for more information.
- Exit all Windows programs, including any anti-virus applications.

To install the Database from Windows NT or 2000

- 1 Log in to the machine.
- 2 Insert the installation CD into the CD-ROM drive.
If Autorun is enabled, the setup program automatically starts. Otherwise:
 - ♦ On the task bar, click the **Start** button, and then click **Run**.
 - ♦ In the **Open** field, type **D:\setup\setup.exe** where **D:** is your CD-ROM drive.
- 3 Follow the online prompts through the **Welcome**, **Software License Agreement**, and **Information** dialog boxes.

Note: The **Software License Agreement** appears twice during the installation process, and must be accepted to continue with the installation.

- 4 When the **User Information** dialog box appears, enter the user name and company for which this software is installed, and then click **Next**.
- 5 In the **Please choose the product to install** dialog box, select the **e*Xchange Partner Manager** check box, and then click **Next**.

The **Check Setup Information** dialog box appears.

- 6 In the **Check Setup Information** dialog box, confirm that the **e*Xchange** component has been selected, and then click **Next**.

This launches the **e*Xchange** portion of the setup wizard.

- 7 Follow the online prompts through the **Welcome**, **Software License Agreement**, and **Information** dialog boxes.
- 8 In the **User Information** dialog box, enter the user name and company for which this software is installed, and then click **Next**.
- 9 In the **Choose Destination Location** dialog box, click **Browse** to change the destination folder; otherwise, click **Next** to continue.

- 10 In the **Select Components** dialog box, select the **e*Xchange Database Schema** check box.
- 11 Click **Next**.
- 12 In the **Check Setup Information** dialog box, review the installation information for the **e*Xchange Database Schema** components, and then click **Next**.
- 13 In the **About the Database Schema** dialog box, review the installation information, and then click **Next**.
- 14 In the **Select Database Server to support e*Xchange** dialog box, select **UDB** then click **Next**.
- 15 In the **Database Administrator Information** dialog box, enter the DB2 UDB administrator **Username** and **Password**, and then click **Next**.
- 16 In the **Database Owner Information** dialog box, enter a **Username** and **Password**, and then click **Next**.

Note: The username and password must be previously defined.

- 17 In the **UDB Database Setup Options** dialog box, select **Full Install of schema (local install only)**, and then click **Next**.
- 18 In the **UDB Specific Info** dialog box, enter a host name and database name, and then click **Next**.

Note: The tablespaces and tables are created.

An information message appears to show that **udb_ex_install.bat** has been launched successfully.

- 19 Click **OK**.
- 20 In the **Setup Complete** dialog box, click **Finish** to complete the e*Xchange Database installation.

Post Installation Notes

The following two steps must be performed after the installation has been completed:

- A Update the application heap size of the database on the DB2 UDB server to 1000.
- B Run usejdbc2.bat. This is located in %DB2TEMPDIR%/SQLLIB/java12.

12.3.2 Creating e*Xchange DB2 UDB Tablespaces and Database objects (partial install) via Install Shield Wizard

This section describes how to create tablespaces and e*Xchange database objects (tables and indexes) for e*Xchange using the Install Shield® Wizard.

Note: *This installation requires that the database is created manually on the DB2 UDB system.*

The installation of the DB2 UDB database objects and tablespaces can be run locally or remotely. If installing remotely, the DB2 UDB client needs to be installed and configured for the database on the remote server.

Installing the Database

Before you begin:

- You must manually create the eXchange database owner on the operating system level. Refer to the DB2 UDB user guide for more information.
- You must manually create the DB2 UDB database.
- Exit all Windows programs, including any anti-virus applications.

To install the Database from Windows NT or 2000

- 1 Log in to the machine.
- 2 Insert the installation CD into the CD-ROM drive.
If Autorun is enabled, the setup program automatically starts. Otherwise:
 - ♦ On the task bar, click the **Start** button, and then click **Run**.
 - ♦ In the **Open** field, type **D:\setup\setup.exe** where **D:** is your CD-ROM drive.
- 3 Follow the online prompts through the **Welcome**, **Software License Agreement**, and **Information** dialog boxes.

Note: *The **Software License Agreement** appears twice during the installation process, and must be accepted to continue with the installation.*

- 4 When the **User Information** dialog box appears, enter the user name and company for which this software is installed, and then click **Next**.
- 5 In the **Please choose the product to install** dialog box, select the **e*Xchange Partner Manager** check box, and then click **Next**.
- 6 In the **Check Setup Information** dialog box, confirm that the **e*Xchange** component has been selected, and then click **Next**.

This launches the **e*Xchange** portion of the setup wizard.

- 7 Follow the online prompts through the **Welcome**, **Software License Agreement**, and **Information** dialog boxes.

- 8 In the **User Information** dialog box, enter the user name and company for which this software is installed, and then click **Next**.
- 9 In the **Choose Destination Location** dialog box, click **Browse** to change the destination folder; otherwise, click **Next** to continue.
- 10 In the **Select Components** dialog box, select the **e*Xchange Database Schema** check box.
- 11 Click **Next**.
- 12 In the **Check Setup Information** dialog box, review the installation information for the e*Xchange back-end components, and then click **Next**.
- 13 In the **About the Database Schema** dialog box, review the installation information, and then click **Next**.
- 14 In the **Select Database Server to support e*Xchange** dialog box, select **UDB** then click **Next**.
- 15 In the **Database Administrator Information** dialog box, enter the DB2 UDB administrator **Username** and **Password**, and then click **Next**.
- 16 In the **Database Owner Information** dialog box, enter a **Username** and **Password**, and then click **Next**.

Note: The username and password must be previously defined.

- 17 In the **UDB Database Setup Options** dialog box, select **Schema requiring manual creation of Database**, and then click **Next**.
- 18 In the **UDB Specific Info** dialog box, enter a host name and database name, and then click **Next**.

Note: The tables are created.

An information message appears to show that **udb_ex_install.bat** has been launched successfully.

- 19 Click **OK**.
- 20 In the **Setup Complete** dialog box, click **Finish** to complete the e*Xchange Database installation.

Post Installation Notes

The following two steps must be performed after the installation has been completed:

- A Update the application heap size of the database on the DB2 UDB server to 1000.
- B Run usejdbc2.bat. This is located in %DB2TEMPDIR%/SQLLIB/java12.

12.3.3 Creating the e*Xchange DB2 UDB Database Objects (minimal install) via Install Shield Wizard

This section describes how to create an DB2 UDB database for e*Xchange using the Install Shield Wizard. You are required to manually create the database and tablespaces. Refer to `cr_udb_epm_tablespaces.sql` for the tablespace names. The tablespaces required are the following:

- EX_PRIM - the primary filegroup.
- EX_EPM_STAT_DATA - contains the company and trading partner profile as well as the user data. Will only grow as the company, trading partners, and user data increases.
- EX_EPM_MTRK_DATA - contains the message tracking data. Will increase as the number of messages increases.
- EX_EPM_MSG_DATA - contains the actual message data. Can increase quite significantly depending on the size of the messages.
- EX_EPM_SEC_MSG_DAT - contains the security message data used primarily in Rosettanet.

The installation of the DB2 UDB database objects and tablespaces can be run locally or remotely. If installing remotely, the DB2 UDB client needs to be installed and configured for the database on the remote server.

Installing the Database Objects

Before you begin:

- You must manually create the eXchange database owner on the operating system level. Refer to the DB2 UDB user guide for more information.
- Exit all Windows programs, including any anti-virus applications.

To install the Database from Windows NT or 2000

- 1 Log in to the machine.
- 2 Insert the installation CD into the CD-ROM drive.
If Autorun is enabled, the setup program automatically starts. Otherwise:
 - ♦ On the task bar, click the **Start** button, and then click **Run**.
 - ♦ In the **Open** field, type **D:\setup\setup.exe** where **D:** is your CD-ROM drive.
- 3 Follow the online prompts through the **Welcome**, **Software License Agreement**, and **Information** dialog boxes.

Note: *The **Software License Agreement** appears twice during the installation process, and must be accepted to continue with the installation.*

- 4 When the **User Information** dialog box appears, enter the user name and company for which this software is installed, and then click **Next**.

- 5 In the **Please choose the product to install** dialog box, select the **e*Xchange Partner Manager** check box, and then click **Next**.
- 6 In the **Check Setup Information** dialog box, confirm that the **e*Xchange** component has been selected, and then click **Next**.
This launches the **e*Xchange** portion of the setup wizard.
- 7 Follow the online prompts through the **Welcome**, **Software License Agreement**, and **Information** dialog boxes.
- 8 In the **User Information** dialog box, enter the user name and company for which this software is installed, and then click **Next**.
- 9 In the **Choose Destination Location** dialog box, click **Browse** to change the destination folder; otherwise, click **Next** to continue.
- 10 In the **Select Components** dialog box, select the **e*Xchange Database Schema** check box. Make sure that the **e*Xchange GUI** and **e*Xchange eGate Schema** check boxes are *not* selected, and then click **Next**.
- 11 In the **Check Setup Information** dialog box, review the installation information for the e*Xchange back-end components, and then click **Next**.
- 12 In the **About the Database Schema** dialog box, review the installation information, and then click **Next**.
- 13 In the **Select Database Server to support e*Xchange** dialog box, select **UDB** then click **Next**.
- 14 In the **Database Administrator Information** dialog box, enter the DB2 UDB administrator **Username** and **Password**, and then click **Next**.
- 15 In the **Database Owner Information** dialog box, enter a **Username** and **Password**, and then click **Next**.

Note: *The username and password must be previously defined.*

- 16 In the **UDB Database Setup Options** dialog box, select **Schema requiring existing Database, Tablespaces**, and then click **Next**.
- 17 In the **UDB Specific Info** dialog box, enter a host name and database name, and then click **Next**.

Note: *The database, tablespaces, and tables are created.*

- 18 An information message appears to show that **udb_ex_install.bat** has been launched successfully. Click **OK**.
- 19 In the **Setup Complete** dialog box, click **Finish** to complete the e*Xchange Database installation.

Post Installation Notes

The following two steps must be performed after the installation has been completed:

- A Update the application heap size of the database on the DB2 UDB server to 1000.

- B** Run usejdbc2.bat. This is located in %DB2TEMPDIR%/SQLLIB/java12.

12.4 Creating a DB2 UDB Database Manually

The following section provides you with instructions for creating a DB2 UDB database schema for e*Xchange. You can create the database schema either before or after installing the e*Xchange GUIs. There are three options for the installation.

- Creating a DB2 UDB database, tablespaces, database objects (tables and indexes)—LOCAL ONLY
- Creating the tablespaces and database objects via the scripts. This requires that the database is already created—LOCAL or REMOTE
- Creating the database objects via the scripts. This requires the database and the tablespaces are already created—LOCAL or REMOTE

Important: Before you begin, you must have DB2 UDB installed. Read the DB2 UDB documentation for information specific to the DB2 UDB installation.

To create a DB2 UDB database

- 1 Copy the installation files from the e*Xchange Installation CD to the e*Xchange root directory.
- 2 Modify files containing the database name.
- 3 Modify files containing the user name and password.
- 4 Modify file containing reference to the server.
- 5 Modify and run the installation file.

12.4.1 Copying the Installation Files to the e*Xchange Root Directory

Before you run the installation, you must copy the files to your own directory so that they can be modified.

To copy the necessary files

- On the machine from which you want to install the e*Xchange DB2 UDB database, copy the following folder on the CD to the e*Xchange root directory:

CD:\setup\ex\database\UDB

The result will be:

\eXchange\UDB

12.4.2 Modifying SQL Statements

For the DB2 UDB database, you must modify two SQL scripts with information specific to your site.

Important: *If you run the automatic install before the manual install then the default `cr_udb_user.sql` will have been replaced by one with values inserted via the install wizard.*

- A `\eXchange\UDB\cr_udb_user.sql`
- B One of the following:

Table 14 Batch files for DB2 UDB manual install

Batch file	Purpose
<code>\eXchange\UDB\udb_ex_install.bat</code>	Creates database, tablespaces, and database objects
<code>\eXchange\UDB\udb_ex_install2.bat</code>	Creates the tablespaces and database objects (database pre-created)
<code>\eXchange\UDB\udb_ex_install3.bat</code>	Only creates the database objects (database and tablespaces pre-created)

To modify `cr_udb_usr.sql`

- 1 Open `\eXchange\UDB\cr_udb_user.sql` in any text editor.
- 2 Update all references to “`ex_admin`” to the new user name.
- 3 Save and close the file.

To modify `udb_ex_install.bat`, `udb_ex_install2.bat`, or `udb_ex_install3.bat`

- 1 In the e*Xchange DB2 UDB directory on your local drive:
`\exchange\UDB`
 locate the file `udb_ex_install.bat`, `udb_ex_install2.bat`, or `udb_ex_install3.bat`.
- 2 Open the file in any text editor and check that the names you specified for the database and the server are referenced in the file. Make changes as required.
 - A Set “`__HOST=`” to the host name
 - B Set “`__USER=`” to the eXchange schema owner
 - C Set “`__PASSWORD=`” to the eXchange schema owner password
 - D Set “`__DATABASE=`” to the name of the database
 - E Set “`__DBADMINUSER=`” to the database administrator
 - F Set “`__DBADMINPASSWORD=`” to the database administrator password
- 3 Save any changes, and close the text file.

To run the install batch script

Double-click the install script modified in “[To modify `udb_ex_install.bat`, `udb_ex_install2.bat`, or `udb_ex_install3.bat` on page 84](#)”. The schema is created, and is owned by the specified user.

12.4.3 Post Installation Notes

The following two steps must be performed after the installation has been completed:

- A Update the application heap size of the database on the DB2 UDB server to 1000.
- B Run **usejdbc2.bat**. This is located in %DB2TEMPDIR%/SQLLIB/java12.

12.5 Creating the DB2 UDB ODBC Connection

The e*Xchange GUIs require the installation of the DB2 UDB ODBC driver in order to connect to the DB2 UDB database. The ODBC driver must be installed on the same machine as the e*Xchange GUIs. You can install the driver when you install the DB2 UDB Client software.

The ODBC connection should be configured for your database instance with the default settings. However, one change must be made to the default settings in order for the ODBC driver to properly handle BLOBS/CLOBS. This is described below.

To configure the ODBC connection

The database must be running before you can create an ODBC connection to it.

- 1 Start the DB2 UDB database for which you are creating the ODBC connection.
- 2 On the task bar, click the **Start** button, point to **Settings**, and then click **Control Panel**.
- 3 Double-click **Administrative Tools**, and then **Data Sources (ODBC)**, to open the **ODBC Data Source Administrator** dialog box.
- 4 In the **ODBC Data Source Administrator** dialog box, select the **System DSN** tab.
- 5 Select your ODBC driver and click **Configure**.
The **Create New Data Source** dialog box appears.
- 6 Once you log into the database, select **Advanced**.
- 7 Select the **Data Type** tab.
- 8 Set **Long object binary treatment** to **As LONGVAR data**.
- 9 Click **OK**.
- 10 Click **OK** to close the **ODBC Data Source Administrator**.

12.6 Uninstalling the DB2 UDB Database

If at any point you want to uninstall the DB2 UDB database that you created for e*Xchange, you must do it via DB2 UDB itself. Uninstalling e*Xchange does not remove the DB2 UDB database.

Updating the e*Xchange e*Gate Schemas to 4.5.1

Please refer to the e*Gate installation guide for details on how to upgrade the Registry Host to 4.5.1.

If you have any questions or problems, please contact our technical support group at (800) 798-0447. For online support, contact us at <http://www.seebeyond.com> and select **Service/Support** from the **SERVICES** menu bar.

A.1 Updating the Schema

If you are using eXchange in conjunction with e*Gate, **before** you upgrade from to 4.5.1, you must run the **stcschemutil.exe** utility.

In previous versions of e*Gate, numerous files from the default schema were copied into user-defined schemas, creating unnecessary duplication. In version 4.5.1, when you create a new schema, the basic underlying files necessary to every schema physically remain inside the directory of the default schema. Only altered files and newly created files are stored inside the new schema directory structure on the hard drive.

The function of this utility is to prevent e*Gate from being able to use old files in place of the updated 4.5.1 files.

Important: *Back up your files before running this utility. This procedure deletes files and is irreversible. Be sure you provide the correct path so that it deletes the right files; and, if you want to preserve files, be sure you provide the correct relative path for the files you are keeping.*

To update your e*Gate schema, you must run the command-line utility, **stcschemutil.exe**, provided with your installation.

This utility requires certain files in certain locations. To set up your machine to run the utility, copy the files as shown in Table 1.

Table 1 stcschemutil Files

Copy this file...	To this location...
\\setup\utils\stcschemutil.txt	The directory where your e*Gate resides.
\\setup\utils\bin\<platform-specific directory>\stcschemutil.exe	

Stcschemutil offers the parameters shown in Table 2.

Table 2 Stcschemutil Parameters

Parameter	Meaning
-ver	Shows the version number
-sd <param>	<e*Gate server directory path name> <[rename] [remove]>
-rename	Renames files
-remove	Deletes files
-keep <param>	Keeps directories. If you want to keep more than one directory, list each one, separated by a comma with no spaces. Note: List the path relative to \eGate\Server\Registry\Repository.
-dbf	Path to the text file.

Example:

```
stcschemutil -sd c:\egate\server -remove -keep
default\monk_scripts\templates\ROS,default\monk_scripts\templates\EX
```

The above example runs stcschemutil to clean up old files, but preserves the \ROS and \EX directories and their contents.

To run stcschemutil.exe

Important: Be very sure you know exactly what you want to delete and what you want to keep before proceeding. It is also a good idea to back up your files prior to running this utility. This utility deletes and renames files and there is no “undo” procedure.

Important: Ensure that no files or directories are write protected.

- 1 Copy files from the CD to your hard drive, as shown in Table 1.
- 2 Navigate to the directory from which you will run stcschemutil.
The files you copied in Step 1 must be in this directory.
- 3 Run either of the following commands, substituting the values **egate** and **directory to keep** as shown:
stcschemutil.exe -sd <egate>/server -rename -keep <directory to keep>
stcschemutil.exe -sd <egate>/server -remove -keep <directory to keep>

For more information, refer to Table 2.

Important: *If you have a custom implementation using the e*Xchange ETD library structures, you must run **stcschemutil** with the **-keep** command to preserve your customized ETD structures. If you do not, the update utility will clear all ETD structures from the **default\monk_scripts\templates\ex** directory.*

A.1.1 Reviewing the Log File

After **stcschemutil.exe** has been run, you must review the log file to review any messages that were displayed and define what items require follow-up action.

The log file is called **stcschemutil.log** and can be found in the **egate\server\registry\repository** directory.

A.1.2 stcschemutil.exe Related Messages

The following table outlines the messages that may display when you run the **stcschemutil.exe** command, and a brief explanation of each.

Table 3 stcschemutil.exe Related Messages

Error Message	Explanation	Suggested Action
Filename Found. Renamed or Removed	The file was found, matched the one in the new file and was either renamed or removed.	Message is informational only.
ERROR Please remove	The file name was found but the contents are not the same as in the new file. It is recommend that the old file be removed.	Check the old file, and remove if it is not needed.
Not a valid egate path	The pathname entered does not seem to have the default schema in the repository.	Check for the validity of the default schema and the egate path referenced.
Error in renaming the file	Tried to rename but could not; possibly because there is already a file with the new name or the user does not have permission.	Check for duplicate names, and change as necessary.
Error in deleting the File	Tried to delete but could not. Could be that the user does not have write permission.	Check permissions on the person executing the executable.
Error in opening file	The file could not be opened; possibly because the file could not be found.	Check for file in directory.
Error in allocating memory	There was an error in allocating the necessary memory for the files.	Check the memory allocation.

Upgrading the e*Xchange Database Schemas from Version 4.1.2 to 4.5.1

This appendix describes how to upgrade an existing 4.1.2 e*Xchange database schema to work with e*Xchange version 4.5.1.

Important: *If you are upgrading from 4.1.0 to 4.5.1, you must first run the install script to update the schemas from 4.1.0 to 4.1.1. See [“Upgrading the e*Xchange Database Schemas from Version 4.1.0 to 4.1.1” on page 97](#). Then follow the upgrade procedure to update schemas from 4.1.1 to 4.1.2. See [“Upgrading the e*Xchange Database Schemas from Version 4.1.1 to 4.1.2” on page 100](#).*

B.1 Upgrading an Oracle Database Schema from 4.1.2 to 4.5.1

To upgrade an Oracle Database Schema from 4.1.2 to 4.5.1 you must first update the database to 4.5, and then to 4.5.1. For more information, see the following sections:

- [“Upgrading an Oracle Database Schema from 4.1.2 to 4.5” on page 89](#)
- [“Upgrading an Oracle Database Schema from 4.5 to 4.5.1” on page 93](#)

B.2 Upgrading an Oracle Database Schema from 4.1.2 to 4.5

To upgrade a 4.1.2 e*Xchange database schema to a 4.5 database schema execute the following steps:

- 1 Extract the upgrade files
- 2 Update the files
- 3 Assign roles to users

B.2.1 Extracting the Upgrade Files

To extract the upgrade files

- 1 Create a folder on a machine that has a connection to the e*Xchange database.
- 2 Using a decompression utility such as WinZip, decompress the files in the `\setup\applications\ex\database\Oracle\upgrade_scripts\upd_ePM_ora_412_45.taz` file on the e*Xchange install CD.
- 3 Copy the uncompressed files to the folder you created in step 1.

B.2.2 Updating the Files

To update the sql files

- 1 Make the following change in the file **update_ePM_412_45.sql**:
 - ♦ Set the `SCRIPT_HOME` variable to the location of the update scripts. For Windows NT and Windows 2000, include the drive letter.
- 2 Make the following changes in the file **epm_defs.sql**:
 - ♦ Set `DATE_FORMAT` to the format used in the 4.1.2 schema.
 - ♦ Set `EPM_ROLE_412` to the role name used in 4.1.2
 - ♦ If desired, change the names of the two roles that are new in version 4.5. It is recommended to use the defaults.
 - ♦ The tablespace names are listed. These were the defaults for 4.1.2. If the tablespace names were changed for the 4.1.2 installation, change the var names in this file to match.

Updating the Schema and Assigning Roles to Users

To update the schema and assign a role to each e*Xchange user

- 1 Log into SQLPLUS as the schema owner.
By default, the schema owner is **ex_admin**.
- 2 Execute script **update_ePM_412_45.sql**.
This updates the schema to the 4.5 configuration.
- 3 Set DB roles as needed.
There are two possible DB roles to choose from in e*Xchange. Do the following:
 - ♦ Log in to the version 4.5 e*Xchange Administrator GUI as a user that has User Administrator privileges.
 - ♦ Manually assign one or both of the roles to each of the users created for e*Xchange.

The database schema is now updated to 4.5. You must now follow the steps in **“Upgrading an Oracle Database Schema from 4.5 to 4.5.1” on page 93** to complete the upgrade to 4.5.1.

B.3 Upgrading an SQL Server Database from 4.1.2 to 4.5.1

To upgrade an SQL Server Database from 4.1.2 to 4.5.1 you must first update the database to 4.5, and then to 4.5.1. For more information, see the following sections:

- [“Upgrading a SQL Server Database from 4.1.2 to 4.5” on page 91](#)
- [“Upgrading a SQL Server Database from 4.5 to 4.5.1” on page 95](#)

B.4 Upgrading a SQL Server Database from 4.1.2 to 4.5

To upgrade a 4.1.2 e*Xchange database schema to a 4.5 database schema execute the following two steps:

- 1 Extract the upgrade files
- 2 Edit the upgrade files/script

B.4.1 Extracting the Upgrade Files

To extract the upgrade files

- 1 Create a folder on a machine that has a connection to the e*Xchange database.
- 2 Using a decompression utility such as WinZip, decompress the files in the **setup\ex\database\sqlserver\upgrade_scripts\upd_ePM_sql_412_45.taz** file on the e*Xchange install CD.
- 3 Copy the uncompressed files to the folder you created in step 1.

B.4.2 Editing the Upgrade Files/Script

To edit the update script

- 1 Change the following settings in the file **update_ePM_412_45.bat**:
 - ♦ Modify the **__USER=sa** to **__USER=<username>**, admin username.
 - ♦ Modify the **__PASSWORD=sa** to **__PASSWORD=<password>**, admin password.
 - ♦ Modify the **__HOST=%COMPUTERNAME%** to **__HOST=<server>**, hostname where SQL Server is installed and e*Xchange database will be located.
 - ♦ Modify the **__DATABASE=exchange** to **__DATABASE=<database name>**, the name of the database. The name *must* be unique within the server.

Upgrading the Schema and Assigning Roles to Users

To update the schema and assign a role to each e*Xchange user

Note: *The default user is **ex_admin**. If the existing database has been changed to a different user name, then you must modify **create_new_role.sql** to replace all instances of **ex_admin** with the new default user name.*

- 1 To begin installation, double-click **update_ePM_412_45.bat**.

This installs the e*Xchange upgrade from 4.1.2 to 4.5.

- 2 Set DB roles as needed.

There are two possible DB roles to choose from in e*Xchange. Do the following:

- ♦ Log in to the version 4.5 e*Xchange Administrator GUI as a user that has User Administrator privileges.
- ♦ Manually assign one or both of the roles to each of the users created for e*Xchange.

- 3 Conditional: edit **create_new_role.sql** file if needed.

- 4 The default user is **ex_admin**. If the existing database has been changed to a different username, then you must modify the file to replace all instances of **ex_admin** with the new default user name.

The database is now updated to 4.5. You must now follow the steps in [“Upgrading a SQL Server Database from 4.5 to 4.5.1” on page 95](#) to complete the upgrade to 4.5.1.

Upgrading the e*Xchange Databases from Version 4.5 to 4.5.1

This appendix describes how to upgrade an existing 4.5 e*Xchange database to work with e*Xchange version 4.5.1.

Important: *If you are upgrading from 4.1.2 to 4.5.1, you must first run the install script to update the databases from 4.1.2 to 4.5. See [“Upgrading the e*Xchange Database Schemas from Version 4.1.2 to 4.5.1” on page 89](#). Also, refer to this chapter if you are upgrading from an earlier version.*

C.1 Upgrading an Oracle Database Schema from 4.5 to 4.5.1

To upgrade a 4.5 e*Xchange database schema to a 4.5.1 database schema execute the following steps:

- 1 Extract the upgrade files
- 2 Edit the upgrade file/script as necessary
- 3 Execute the scripts
- 4 (Optional) Drop the e*Xchange users

C.1.1 Extracting the Upgrade Files

To extract the upgrade files

- 1 Create a folder on a machine that has a connection to the e*Xchange database.
- 2 Using a decompression utility such as WinZip, decompress the files in the `\setup\ex\database\oracle\upgrade_scripts\upd_ex_ora_450_451.taz` file on the e*Xchange install CD.
- 3 Copy the uncompressed files to the folder you created in step 1.

C.1.2 Updating the File

To update the sql files

- 1 Make the following change in the file **update_eX_450_451.sql**:
 - ♦ Set the SCRIPT_HOME variable to the location of the update scripts. For Windows NT and Windows 2000, include the drive letter.
 - ♦ Set DATE_FORMAT to the format used in the 4.5 schema.
 - ♦ Set EPM_DEF_ROLE to the role name used in 4.5. This is currently set to the default value.
 - ♦ Set EPM_RT_ROLE to the role name used in 4.5. This is currently set to the default value.

Important: This update script drops the public synonyms. If this schema originated from 4.1.2, or earlier and e*Insight is sharing this schema, comment out the following line so that the public synonyms are not dropped.

```
@&SCRIPT_HOME/drop45_syns
```

C.1.3 Updating the Schema

To update the schema

- 1 Log into SQLPLUS as the schema owner.
By default, the schema owner is **ex_admin**.
- 2 Execute the update scripts by entering the following command:

```
@update_eX_450_451.sql
```

This updates the schema to the 4.5.1 configuration.

C.1.4 Drop e*Xchange Users (Optional)

As of e*Xchange 4.5.1, the users created within the application are no longer created or needed at the database level. The users, other than the schema owner, can be removed from the database level. The command for this is:

```
drop user <username> cascade
```

This must be performed by the DBA user from SQL Plus.

Important: This will drop the user and all of the database objects that the user owns. Thus, ensure that the user is only used within the e*Xchange application.

C.2 Upgrading a SQL Server Database from 4.5 to 4.5.1

To upgrade a 4.5 e*Xchange database to a 4.5.1 database execute the following two steps:

- 1 Extract the upgrade files
- 2 Edit the upgrade file/script as necessary
- 3 Execute the upgrade script

C.2.1 Extracting the Upgrade Files

To extract the upgrade files

- 1 Create a folder on a machine that has a connection to the e*Xchange database.
- 2 Using a decompression utility such as WinZip, decompress the files in the **setup\ex\database\sqlserver\upgrade_scripts\upd_eX_ss_450_451.taz** file on the e*Xchange install CD.
- 3 Copy the uncompressed files to the folder you created in step 1.

C.2.2 Editing the Upgrade File/Script

To edit the update script

- 1 Change the following settings in the file **update_eX_450_451.sql**:
 - ♦ Set EPM_DEF_ROLE and EPM_RT_ROLE variable to the role names used in 4.5, if these have been changed from the default values.

C.2.3 Updating the database

To update the database

- 1 In a command window, move to the directory where the update scripts are located.
- 2 Execute the following command:

```
isql -U<username> -P<password> -S<host> -d<eXchangeDB>  
-iupdate_eX_450_451.sql > eX_450_451.log
```

Use the database administrator user name and password for this command.

- 3 Optional. The 4.5.1 e*Xchange application no longer creates or uses database level users other than the database owner. Therefore, all users created from the applicaiton can now be deleted at the database level. These “additional users” still maintain their user names and passwords within the application.

C.3 Upgrading a Sybase Database from 4.5 to 4.5.1

To upgrade a 4.5 e*Xchange database to a 4.5.1 database execute the following two steps:

- 1 Extract the upgrade files
- 2 Edit the upgrade file/script as necessary
- 3 Execute the upgrade script

C.3.1 Extracting the Upgrade Files

To extract the upgrade files

- 1 Create a folder on a machine that has a connection to the e*Xchange database.
- 2 Using a decompression utility such as WinZip, decompress the files in the **setup\ex\database\sybase\upgrade_scripts\upd_ex_sy_450_451.taz** file on the e*Xchange install CD.
- 3 Copy the uncompressed files to the folder you created in step 1.

C.3.2 Editing the Upgrade File/Script

To edit the update script

- 1 Change the following settings in the file **update_ex_450_451.sql** if required:
 - ♦ The last three lines of the upgrade script list the default roles to be removed. Change these role names if they were modified from the default value during the initial installation.

Upgrading the database

To update the database

- 1 In a command window, move to the directory where the update scripts are located.
- 2 Execute the following command:

```
isql -U<username> -P<password> -S<host> -D<eXchangeDB>  
-iupdate_ex_450_451.sql > ex_450_451.log
```

Use the database administrator user name and password for this command.

- 3 Optional. The 4.5.1 e*Xchange application no longer creates or uses database level users other than the database owner. Therefore, all users created from the applicaiton can now be deleted at the database level. These “additional users” still maintain their user names and passwords within the application.

Upgrading the e*Xchange Database Schemas from Version 4.1.0 to 4.1.1

This appendix describes how to upgrade an existing 4.1.0 Oracle e*Xchange Database schema to work with e*Xchange version 4.1.1.

Important: *If you are upgrading from 4.1.0 to 4.1.2, you must first run the install script from 4.1.0 to 4.1.1. Once you have completed this upgrade, see [“Upgrading the e*Xchange Database Schemas from Version 4.1.1 to 4.1.2” on page 100](#).*

D.1 Installing the Upgrade

To upgrade a 4.1.0 e*Xchange database schema to a 4.1.1 database schema, execute the following three steps:

- 1 Extract the upgrade files
- 2 Edit the upgrade files/script
- 3 Run the upgrade script from a command line

D.1.1 Extracting the Upgrade Files

To extract the upgrade files

- 1 Create a folder on a machine that has a connection to the e*Xchange database.
- 2 Using a decompression utility such as WinZip, decompress the files in the `\setup\applications\ex\database\Oracle\upgrade_scripts\upd_eX_ora_410_411.taz` file on the e*Xchange install CD.
- 3 Copy the uncompressed files to the folder you created in step 1.

D.1.2 Editing the Upgrade Files/Script

You must change several files used in the database upgrade process, using a text editor such as Notepad, to match the site-specific implementation information.

To edit the update script

The file you edit depends on your operating system.

- For Windows NT, edit **ex_update.bat**
- For UNIX, edit **ex_update.sh**

For either script do the following:

Open the update script appropriate to your operating system in a text editor. Change the environment variables in the upgrade script to match your implementation. Use Table 4 below for more information on changing these variables.

Example: change the line

```
SET TNS_NAME=eXchange
```

to

```
SET TNS_NAME=yourdatabase
```

where “yourdatabase” is the name you use to connect to the e*Xchange database on the machine from which you will be running the upgrade script.

Table 4 Upgrade Script Environment Variables

Environment Variable	Description
Oracle_HOME	The Oracle Home location on the machine from which you will run the upgrade script.
TNS_NAME	The name used to connect to the e*Xchange database on the machine from which you will run the upgrade script.
SYSTEMPW	The password to the system account on the e*Xchange database. (The default is manager)
ADMIN_NAME	The name of the e*Xchange administrator account. This account owns the e*Xchange database schema. (The default is ex_admin)
ADMIN_PW	The password for the e*Xchange administrator account. (The default is ex_admin)
SCRIPTDRIVE	The drive letter on the machine where the upgrade scripts reside. This variable is not used in the UNIX version of the upgrade script.
SCRIPTHOMEDIR	The path on the local machine to the directory where the upgrade scripts are located.

To edit `alter_database.sql` and `update_exchange.sql`

Using a text editor, change the files: `alter_database.sql` and `update_exchange.sql` to specify your script home path.

Change the line:

```
define SCRIPT_HOME = "c:\update_script"
```

to

```
define SCRIPT_HOME = "c:\yourscripthome"
```

where c:\ is the drive where you created the folder in which to extract the files from the e*Xchange installation CD and where "yourscripthome" is the location of the database upgrade scripts that you extracted from the e*Xchange install CD.

To edit `tsp_defs.sql`

Using a text editor, change the file `tsp_defs.sql` to specify the location of the existing e*Xchange database tablespace files on the machine running the database. These files were created when the 4.1.0 version of the e*Xchange database schema was created. You must use the same location.

Change the lines

```
define TSP1 = "c:\Oracle\oradata\exchange"
define TSP2 = "c:\Oracle\oradata\exchange"
define TSP3 = "c:\Oracle\oradata\exchange"
```

to

```
define TSP1 = <Tablespace path>
define TSP2 = <Tablespace path>
define TSP3 = <Tablespace path>
```

where <Tablespace path> is the location of the existing e*Xchange table spaces on the machine running the e*Xchange database. This is not necessarily the machine being used to run the upgrade script.

D.1.3 Running the Update Script

You can either run the update script from a command prompt or Windows Explorer.

To run the update script

- 1 Run `ex_update.bat` (or `ex_update.sh` for UNIX) from a command prompt, or double click it from Windows Explorer.
- 2 The script displays "Update complete." when finished.

Upgrading the e*Xchange Database Schemas from Version 4.1.1 to 4.1.2

This appendix describes how to upgrade an existing 4.1.1 Oracle e*Xchange database schema to work with e*Xchange version 4.1.2.

Important: *If you are upgrading from 4.1.0 to 4.1.2, you must first run the install script to update the schemas from 4.1.0 to 4.1.1. See [“Upgrading the e*Xchange Database Schemas from Version 4.1.0 to 4.1.1”](#) on page 97.*

E.1 Installing the Upgrade

To upgrade a 4.1.1 e*Xchange database schema to a 4.1.2 database schema, execute the following four steps:

- 1 Extract the upgrade files
- 2 Edit the upgrade files/script
- 3 Edit the tablespace names
- 4 Run the upgrade script from a command line

Important: *If you are upgrading from 4.1.0 to 4.1.2, you must first run the install script from 4.1.0 to 4.1.1. See [“Upgrading the e*Xchange Database Schemas from Version 4.1.0 to 4.1.1”](#) on page 97.*

E.1.1 Extracting the Upgrade Files

To extract the upgrade files

- 1 Create a temp folder on a machine that has a connection to the e*Xchange database.
- 2 Using a decompression utility such as WinZip, decompress the files in the `\setup\applications\ex\database\Oracle\upgrade_scripts\upd_eX_ora_411_412.taz` file on the e*Xchange install CD.
- 3 Copy the uncompressed files to the folder you created in step 1.

E.1.2 Editing the Upgrade Files/Script

Several files used in the database upgrade process must be changed using a text editor to match the site-specific implementation information.

To edit the upgrade files

The file you edit depends on your operating system.

- For Windows NT or 2000, edit **ex_update.bat**
- For UNIX, edit **ex_update.sh**

For either script, do the following:

Open the update script appropriate to your operating system in a text editor. Change the environment variables in the upgrade script to match your implementation. Use Table 5 below for more information on changing these variables.

Example: change the line

```
SET TNS_NAME=eXchange
```

to

```
SET TNS_NAME=yourdatabase
```

where “yourdatabase” is the name you use to connect to the e*Xchange database on the machine from which you will be running the upgrade script.

Table 5 Upgrade Script Environment Variables

Environment Variable	Description
Oracle_HOME	The Oracle Home location on the machine from which you will run the upgrade script.
TNS_NAME	The name used to connect to the e*Xchange database on the machine from which you will run the upgrade script.
SYSTEMPW	The password to the system account on the e*Xchange database. (The default is manager.)
ADMIN_NAME	The name of the e*Xchange administrator account. This account owns the e*Xchange database schema. (The default is ex_admin.)
ADMIN_PW	The password for the e*Xchange administrator account. (The default is ex_admin.)
SCRIPTDRIVE	The drive letter on the machine where the upgrade scripts reside. This variable is not used in the UNIX version of the upgrade script.
SCRIPTHOMEDIR	The path on the local machine to the directory where the upgrade scripts are located.

To edit alter_database.sql

- 1 Open <temp>\alter_database.sql in any text editor.

Where **temp** is the directory you created in [“Extracting the Upgrade Files” on page 100](#).

- 2 Change the line:

```
define SCRIPT_HOME = \update_script"
to
define SCRIPT_HOME = \yourscripthome"
```

Where **“yourscripthome”** is the location of the database upgrade scripts that you extracted from the e*Xchange installation CD in the step [“Extracting the Upgrade Files” on page 100](#).

To edit update_exchange.sql

- 1 Open <temp>\update_exchange.sql in any text editor.

Where **temp** is the directory you created in [“Extracting the Upgrade Files” on page 100](#).

- 2 Change the line:

```
define SCRIPT_HOME = \update_script"
to
define SCRIPT_HOME = \yourscripthome"
```

Where **“yourscripthome”** is the location of the database upgrade scripts that you extracted from the e*Xchange installation CD in the step [“Extracting the Upgrade Files” on page 100](#).

To edit tsp_defs.sql

- 1 Open \<temp>\Oracle\tsp_defs.sql in any text editor.

Where **temp** is the directory you created in [“Extracting the Upgrade Files” on page 100](#).

- 2 Change the lines:

```
define TSP1 ="c:\Oracle\oradata\exchange"
define TSP2 ="c:\Oracle\oradata\exchange"
define TSP3 ="c:\Oracle\oradata\exchange"
to
define TSP1 =<Tablespace path>
define TSP2 =<Tablespace path>
define TSP3 =<Tablespace path>
```

where **“Tablespace path”** is the location of the e*Xchange Oracle database tablespace files.

Example:

```
Oracle\oradata\<database name>\app_tsp
```

Note: These files were created when the 4.1.0 version of the e*Xchange database schema was created. You must use the same location.

E.1.3 Updating the Tablespace Names

In version 4.1.1, the tablespace names were modified to be more descriptive, and more closely associated with the e*Xchange components. Due to this change, if you are upgrading to 4.1.2 and the original eXchange installation was version 4.1.0, you will need to make some modifications to the file **tsp_defs.sql** to use the old (original) tablespace names. In this file you will need to comment out the define statements for the new tablespace names, and uncomment the old tablespace names.

Important: *If you are upgrading from 4.1.1 to 4.1.2, you do **not** need to make these modifications, as the tablespace names are the same in 4.1.1 and 4.1.2. These steps are only applicable if you are upgrading from 4.1.0 to 4.1.2, and the 4.1.0 to 4.1.1 upgrade has been completed. See ["Upgrading the e*Xchange Database Schemas from Version 4.1.0 to 4.1.1" on page 97](#) for more information.*

To update to 4.1.2 when using the 4.1.0 tablespace names

- 1 Navigate to \eXchange\Oracle.
- 2 Open **tsp_defs.sql** in any text editor.

The new tablespace names are listed above the dashed line, and the old tablespace names are listed below it. Additionally, each set of old and new tablespace names are broken out by e*Insight and e*Xchange.

Example:

```
-- STC ePM eXchange tablespace info

define TSP_dname1 = "ex_epm_stat_data"
define TSPex_data2 = "&TSP1/ex_epm_stat_data.dbf"

-- STC eBPM eXchange tablespace info

define TSP_dname4 = "ex_ebpm_stat_data"
define TSPex_data4 = "&TSP2/ex_epm_stat_data.dbf"

-----

-- STC ePM eXchange tablespace info

--define TSP_dname1 = "ex_data1"
--define TSPex_data1 = "&TSP1/ex_data_1.dbf"

-- STC eBPM tablespace info

--define TSP_dname4 = "static data"
--define TSPex_data4 = "&TSP3/static_data.dbf"
```

- 3 Comment out the new tablespace names, and uncomment the old tablespace names.

The following example illustrates these changes:

```
-- STC ePM eXchange tablespace info

--define TSP_dname1 = "ex_epm_stat_data"
```

```
--define TSPex_data2 = "&TSP1/ex_epm_stat_data.dbf"

-- STC eBPM eXchange tablespace info

--define TSP_dname4 = "ex_ebpm_stat_data"
--define TSPex_data4 = "&TSP2/ex_epm_stat_data.dbf"

-----

-- STC ePM eXchange tablespace info

define TSP_dname1 = "ex_data1"
define TSPex_data1 = "&TSP1/ex_data_1.dbf"

-- STC eBPM tablespace info

define TSP_dname4 = "static data"
define TSPex_data4 = "&TSP3/static_data.dbf"
```

- 4 Save and close the file.

E.1.4 Running the Update Script

You can either run the update script from a command prompt or Windows Explorer.

To run the update script

- 1 Run ex_update.bat (or ex_update.sh for UNIX) from a command prompt, or double click it from explorer.

The script displays "Update complete." when finished.

E.1.5 Updating Configuration Files

After upgrading the schema, you must update the paths in your configuration files to include the new folders.

You must make configuration changes in the following e*Ways:

- eX_ePM e*Way
- eX_ePM_Ack_Monitor e*Way
- HTTP e*Way

To update the configuration files

- 1 In the Enterprise Manager, double-click the eX_ePM e*Way to open up the **Properties** dialog box.
- 2 In the **Configuration File** section, click the **Edit** button to edit the configuration file.
The **Edit Settings** dialog box is displayed.
- 3 From the **Goto Section** list, select **Monk Configuration**.
- 4 From the **Goto Parameter** list, select **Auxiliary Library Directories**, and then add the setting given in Table 6 to any existing path that might be there.

Note: Add the new information to the end of the existing parameter. Do not replace the existing information.

- 5 From the **Goto Parameter** list, select **Additional Path**, and then add the setting given in Table 6 to any existing path that might be there.
- 6 From the **Goto Section** list, select **General Settings**.
- 7 From the **Goto Parameter** list, select **Journal File Name**, and then enter the file name, including path if desired, that you want to use for the journal file.

Note: If you do not specify a path, or if you specify a relative path, e*Xchange bases the path on the location at which the Participating Host is installed; for example, *c:\eGate\Client*.

- 8 Save the changes.
- 9 Repeat steps 1 through 7 for the eX_ePM_Ack_Monitor e*Way.
- 10 Repeat steps 1 through 4 for the HTTP e*Way.
- 11 Save the changes.

Table 6 Additional Configuration Settings

Section	Parameter	Addition to Setting
Monk Configuration	Auxiliary Library Directories	;monk_library/eXchange
Monk Configuration	Additional Path	;monk_scripts/templates/ROS;monk_scripts/templates/ROS/ROS_10;monk_scripts/templates/ROS/ROS_11;monk_scripts/common/BIZ

E.2 Uninstalling the Existing e*Xchange Oracle Database

You can use this Oracle script to delete your existing Oracle schema if you want to install a clean database schema instead of upgrading your current one.

Important: Running this script will cause irrevocable harm to your existing database. It should only be run if your intent is to completely uninstall the existing database with the intent of creating a new one. Two warning messages are displayed before the uninstall takes place.

To uninstall the current e*Xchange database schema execute the following steps

- 1 Copy the uninstall files from the e*Xchange Installation CD to the e*Xchange root directory.
- 2 Modify the SQL statements with the specific information for your system.
- 3 Run the **ex_uninstall.sql** script in SQL*Plus to uninstall the schema.

E.2.1 Copying the Uninstall Files to the e*Xchange Root Directory

To copy the necessary files

- 1 On a Windows NT or 2000 machine, insert the e*Xchange installation CD into the CD-ROM drive. the machine running the DBMS, do one of the following:
- 2 Copy the following folder to the e*Xchange root directory of the machine running the DBMS:

```
CD:\setup\applications\ex\database\Oracle
```

The result will be:

```
\eXchange\Oracle
```

E.2.2 Modifying SQL Statements

For the Oracle database, you must modify the following scripts with information specific to the schema you are uninstalling.

- ♦ \eXchange\Oracle\ex_uninstall.sql
- ♦ \eXchange\Oracle\user_defs.sql

To modify ex_uninstall.sql

- 1 Open \eXchange\Oracle\ex_uninstall.sql in any text editor.
- 2 Under **Install scripts home dir**, double-check that the path specified for SCRIPT_HOME is where you have copied the files from the CD, and edit the path as necessary.

For example:

```
-- Install scripts home dir
-- Use the following line for release
define SCRIPT_HOME = "/ex/database/Oracle"
```

If you installed e*Xchange on your d: drive, change the path to read:

```
define SCRIPT_HOME = "d:\eXchange\Oracle"
```

Where d: is the drive where you installed e*Xchange.

Note: In UNIX you can omit the drive designation.

- 3 Save and close the file.

To modify user_defs.sql

- 1 Open \eXchange\Oracle\user_defs.sql in any text editor.
- 2 Under **TNS NAME**, replace the default information with the TNS (database) name for the Oracle instance which you will be deleting.

For example:

```
REM specify the TNS name of the Oracle instance to connect with
REM Use the following line for release
```

```
define TNS_NAME=exchange
```

If you have created a database called "Oracle1," the information should be changed to:

```
define TNS_NAME=Oracle1
```

- 3 Under **STC eXchange ePM User Info**, replace the default password to use a different password for the schema owner.

For example:

```
-- STC eXchange ePM User Info

define ADMIN_NAME = "ex_admin"
define ADMIN_PW = "ex_admin"
```

To change the password for logging into the database specified under TNS_NAME to "Oracle_password" change the file to read:

```
define ADMIN_NAME = "ex_admin"
define ADMIN_PW = "Oracle_password"
```

Important: The ADMIN_NAME, *ex_admin*, is part of the default scripts and cannot be changed.

- 4 Save and close the file.

E.2.3 Running the ex_uninstall.sql Script

Important: You must be logged in to the system account for the Oracle database before running the uninstall script.

To run the ex_uninstall.sql script

- 1 Open SQL Plus, and log in using the system user name and password, using the TNS_NAME (database name) as the Host String.
- 2 At the SQL> prompt type the command:

```
@<path to ex_uninstall.sql>
```

where

path to ex_uninstall.sql is the name and location of the **ex_uninstall.sql** file that was copied from the e*Xchange installation CD-ROM.

For example:

```
@c:\exchange\Oracle\ex_uninstall.sql
```

- 3 Press **Enter**.

A warning message is displayed, as shown below:

```
WARNING: This will COMPLETELY DESTROY your e*Xchange installation
and you'll lose ALL your enterprise's Business Process data!
Are you sure you want to proceed? If not, abort by pressing Ctrl-C
now!
```

```
Press Enter to continue with the UnInstall;otherwise press Ctrl-C.
```

- 4 Press **Enter** to continue, or Ctrl+C to cancel.

The second warning message is displayed as shown below:

```
ARE YOU SURE??? Press Ctrl-C if you're NOT!!!
```

```
Press Enter to continue with the UnInstall;otherwise press Ctrl-C.
```

- 5 Press Enter to continue, or Ctrl+C to cancel.

The process of deleting the schema begins.

Note: *Once the schema has been deleted, see “[Creating the e*Xchange Database Schema—Oracle](#)” on [page 45](#) for information on installing a new Oracle schema.*