

e*Index Global Identifier Product Suite

e*Index™ Global Identifier Installation Guide

Version 4.5.2



SEEBEYOND

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Introduction

About this Chapter

Overview

This introduction provides an overview of the steps you need to follow to install the e*Index GUI, the e*Index database, and the e*Index Schema files for version 4.5.2.

The following diagram illustrates the contents of each major topic in this chapter. For the page numbers on which specific topics appear, see "What's Inside" on the following page.

Welcome	Learn where to start in this guide if you are a new or experienced user
About the Installation	Learn background information about the steps required to install e*Index
Additional Resources	Learn about other e*Index publications you may wish to review

What's Inside

This chapter provides background information and instructions related to the topics listed below.

Introduction	1-3
About the Installation Procedure	1-7
Additional Resources	1-11

Introduction

Welcome

Welcome to e*Index, SeeBeyond's enterprise-wide master person index. This document explains how to install e*Index 4.5.2 components on both the client and server machines, including the e*Index Schema files, e*Index database and reports, and e*Index GUI. This chapter of the document provides background information you should know before installing e*Index.

Whether you are a new or established user, you should read through this guide before you begin the installation. Please pay particular attention to the overview sections provided at the beginning of each chapter and at the beginning of each section within a chapter. The overview sections are designed to provide background and explanatory information you may need to understand. After reading the overview information, you will be ready to perform specific tasks using the step-by-step instructions provided in each chapter.

What is the Scope of this Guide?

This guide provides step-by-step instructions for installing all of the components of e*Index 4.5.2, including the e*Index Schema files, the database, and the GUI. It includes navigational information, functional instructions, and background information where required. This guide also provides an illustration of the files that are installed into the e*Gate environment when you install the e*Index components, as well as a description of the database tables up to version 4.5.2.

This guide does not include information or instructions on using any of the e*Index applications. These topics are covered in the appropriate user guide (for more information, see "Additional Resources" on page 1-10).

Who Should Use this Guide?

Any user who installs any component of e*Index should read this guide. A thorough knowledge of e*Index is not needed to understand this guide. It is presumed that the reader of this guide is familiar with the e*Gate environment, e*Gate Schemas, database administration, the database platform of the e*Index database, and the operating system(s) on which e*Gate and the e*Index database run.

How Should this Guide be Used?

For best results, you should skim through the guide to familiarize yourself with the locations of essential procedures you need to perform. Each chapter begins with a simple graphic that identifies the information contained in the chapter. The second page of each chapter contains a list of topics and instructions included in the chapter and the associated page numbers.

How is this Guide Organized?

This guide is divided into six chapters that cover the topics shown below.




Chapter	Topics
Chapter 1, Introduction	<ul style="list-style-type: none"> ■ Introduction ■ About the Installation Procedure ■ Additional Resources
Chapter 2, Installing the e*Index Schema Files	<ul style="list-style-type: none"> ■ Learning About the e*Index Schema ■ Installing the e*Index Schema
Chapter 3, Installing an Oracle Database	<ul style="list-style-type: none"> ■ Learning About the Database Installation ■ Creating the Database ■ e*Index 4.5.2 Oracle Database Model
Chapter 4, Installing a Sybase Database	<ul style="list-style-type: none"> ■ Learning About the Database Installation ■ Creating the Database ■ e*Index 4.5.2 Sybase Database Model
Chapter 5, Installing a Microsoft SQL Server Database	<ul style="list-style-type: none"> ■ Learning About the Database Installation ■ Creating the Database ■ e*Index 4.5.2 Microsoft SQL Server Database Model
Chapter 6, Installing the GUI and Publications	<ul style="list-style-type: none"> ■ Learning About the GUI and Publications ■ Installing the GUI and Publications

What Conventions are Used in this Guide?

Before you start using this guide, it is important to understand the icon, special notation, and mouse conventions used.

Icon and Special Notation Conventions

The following conventions are used in this and other e*Index publications to identify special types of information.

Icon or Notation	Type of information
Note	Supplemental information that is helpful to know, but not essential to completing a particular task.
Tip	Information that helps you to apply techniques and procedures described in the text to your specific needs. May also suggest alternative methods.
Important!	Information that is essential to the completion of a task.
Caution!	Advises you to take specific action to avoid loss of data.
	Indicates the beginning of a step-by-step instruction.
	Specifies a task to perform before you begin a step-by-step instruction.
	Indicates a cross-reference to other sections of the guide or to other publications.

Mouse Conventions

You can use either a single-button mouse or a multiple-button mouse with e*Index. If you use a multiple-button mouse, the left mouse button is the primary button, unless the mouse is configured differently.

The instructions in this guide may require you to use the mouse in a variety of ways:

- **Point** means to position the mouse pointer until the tip of the pointer rests on whatever you want to point to on the screen.
- **Click** means to press and then immediately release the left mouse button without moving the mouse.
- **Double-click** means to click the left mouse button twice, in rapid succession.
- **Right-click** means to click the right mouse button once.
- **Drag** means to point and then hold down the mouse button as you move the mouse. **Drop** means to let go of the mouse button to place the dragged information where you want it to be moved.
- **Move** means to point to an object on the screen, such as an e*Index Security user group, and drag the mouse to move the object to a screen location of your choice.
- **Highlight** means to select an area of text by dragging the mouse over the desired portion of text that appears on a window.
- **Select** means to point to a list of information on an e*Index window, and then click once to choose the data you want. The information becomes highlighted when selected.
- **Expand** means to double-click a row of information on an expandable list to display more details. The details appear on another row, below the row you double-click.
- **Collapse** means to double-click a row of information on an expandable list to hide the details that appear on the following row.

About the Installation Procedure

Overview

This section of the chapter outlines the requirements for e*Index, and summarizes the order of the steps you need to follow to install e*Index 4.5.2, starting with the e*Gate environment and ending with the GUI workstation.

Requirements

The installation must be performed on a computer running Windows 95, Windows 98, or Windows NT 4.0 SP4 or later, or Windows 2000. Prior to beginning the installation, verify that you have the appropriate software installed.

e*Gate™ Integrator Requirements

If you are not currently running the following versions of e*Gate and the Database e*Way™, you need to upgrade them before performing the e*Index installation.

- e*Gate Integrator version 4.5.0 or later
- The Database e*Way (version 4.5.0 or later) appropriate to the database platform you are using:
 - For an Oracle database, install the Oracle e*Way
 - For a Sybase database, install the Sybase e*Way
 - For a SQL Server database, install the ODBC e*Way
- HL7 Templates version 4.5.0 or later (only if you are transmitting HL7 messages)
- e-Mail e*Way 4.5.0 or later (if you plan to use the Event Notification capability of e*Index Security)

Database Platform Requirements

The e*Index database is supported on three different database platforms with the following requirements.

- **Oracle Database**
An Oracle database requires Oracle 8.1.7 Server on the database server machine, and Oracle 8.1.7 Client on the client workstations and the e*Gate server machines on which you install the e*Index Schemas.
- **Sybase Database**
A Sybase database requires Sybase 12.0 Server on the database server

machine, and Sybase 12.0 Client on the client workstations and the e*Gate server machines on which you install the e*Index Schemas.

- **Microsoft SQL Server Database**

A Microsoft SQL Server database requires SQL Server Enterprise Edition 7.0 on the database machine, the client workstations, and the e*Gate server machines on which you install the e*Index Schemas.

Schema Platforms

The e*Index Schema files can be installed on any of the following platforms:

- Windows NT 4.0 SP4 or higher, Windows 2000 SP2
- Solaris 2.6 or higher
- HP-UX 11 or 11i
- AIX 4.3.3 or 5.1
- TRU64 V4.0F and V5.0A

Installation Overview

Most of the setup for e*Index is performed using a standard InstallShield® Wizard with specific customizations for each component. Each step outlined below describes how to install one component, and is described in detail in its own chapter in this guide. Once you have installed the files for a specific step, some modifications may be required. All required modifications are described in the appropriate chapter.

For clarity, this document describes the installation of one component at a time. To save time, you can install the files for all components at one time on a client machine, but this will require some extra steps. Figure 1-1 on page 1-10 illustrates the steps you need to follow to install all components at one time.

- Step 1: Install the e*Index Schema Files (described in Chapter 2)
- Step 2: Install the Database (described in Chapters 3, 4, and 5)
- Step 3: Install the GUI and Publications (described in Chapter 6)

Step 1: Install the e*Index Schema Files

Chapter 2, "Installing the e*Index Schema Files", outlines the steps required to install the e*Index Schema components into the e*Gate environment. This chapter discusses file structure and the modifications that may be required to the e*Way configuration file, backend libraries, and Monk files.

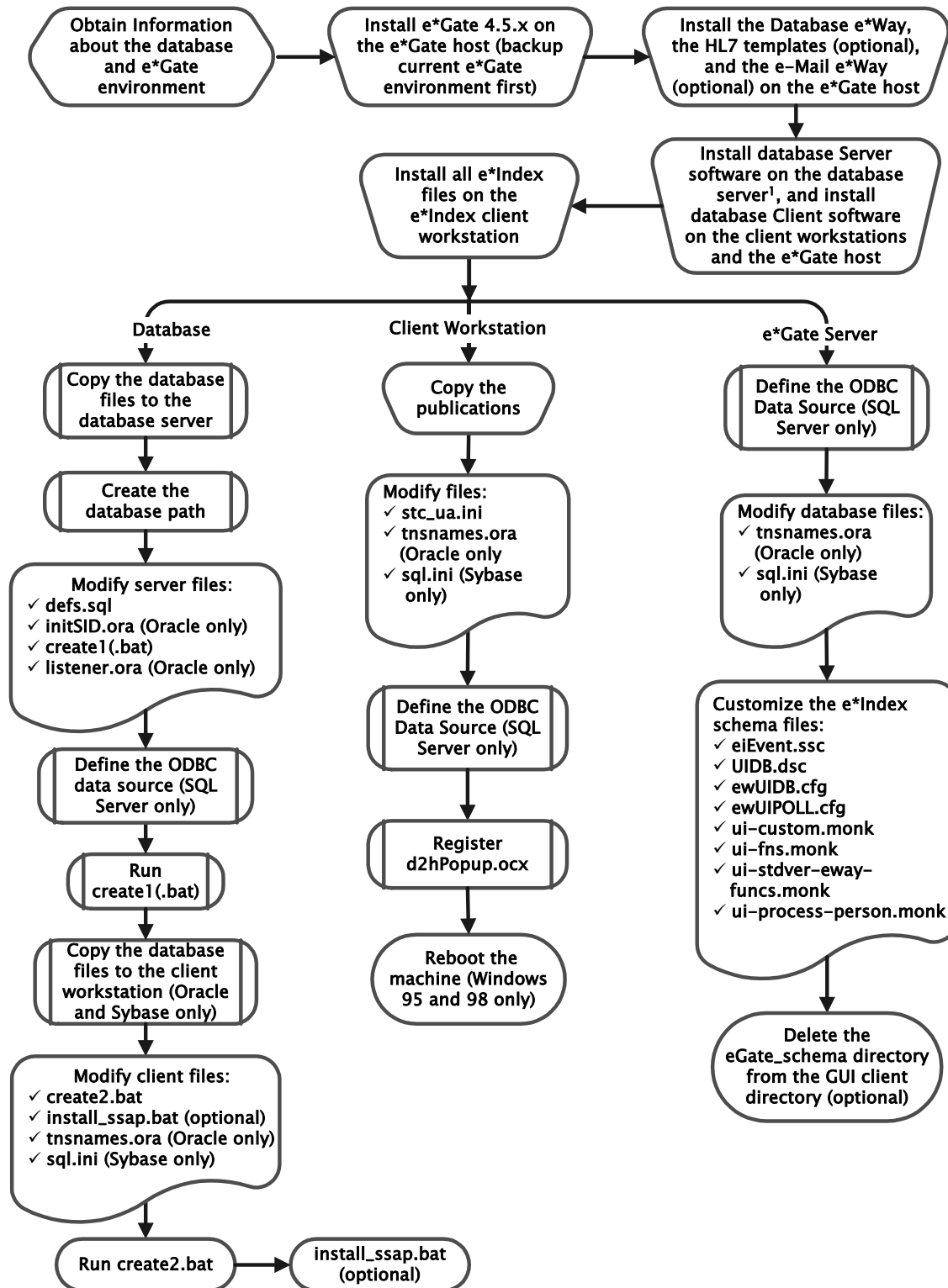
Step 2: Install the Database

Chapters 3, 4, and 5 of this guide provide the instructions you need to create the e*Index database and to install standard reports (reports are for Oracle only). Chapter 3 describes installing an Oracle database, Chapter 4 describes installing a Sybase database, and Chapter 5 describes installing a SQL Server database. Chapter 3 also describes how to install the e*Index reports, which are currently provided only for an Oracle installation. The database structure for each platform is illustrated in the appropriate chapter so you can verify your new database. The data models provided are based on the e*Index 4.5.2 structure. Subsequent maintenance releases may show slight variations.

Step 3: Install the GUI and Publications

Chapter 6, "Installing the GUI and Publications", contains the instructions for installing the e*Index GUI on the Quality Workstation. This chapter includes hardware and software requirements for the installation. If you have not already copied the e*Index publications to your computer, you can also install the e*Index Electronic Library. This library includes the suite of e*Index documentation and a Welcome document to help you navigate through the files.

Figure 1-1: Installation Overview

Installing all components at one time

¹ If you are installing a Sybase database, be sure to configure the Adaptive Server for the e*Index database

Additional Resources

SeeBeyond has developed a suite of e*Index user's guides and related publications that are distributed in an electronic library.

- *e*Index Global Identifier User's Guide*
Helps e*Index quality workstation users to perform database maintenance tasks, such as merging and unmerging records, finding and resolving potential duplicates, adding and updating records, and viewing the audit trail.
- *e*Index Administrator User's Guide*
Helps system administrators configure the system parameters for e*Index to meet your business requirements. This guide also describes how to maintain the information in the database that is used to populate the drop-down lists in the e*Index.
- *e*Index Security User's Guide*
Helps system administrators add users and user groups to e*Index applications, to grant security permissions to users and user groups, to maintain user and user group information, and to configure certain system parameters.
- *e*Index Global Identifier Technical Reference*
Describes message processing for e*Index, as well as database tables and e*Index Monk APIs. This guide also provides a complete listing of e*Index Monk APIs and functions, along with a description, parameters, syntax, return values, and examples for each.
- *e*Index Global Identifier Upgrade Guide*
Helps system and database administrators upgrade an existing e*Index environment to the most current release, including e*Index Schema files, the e*Index GUI, and database upgrades.
- *e*Index 4.1.1 to 4.5.1 Upgrade Guide*
Helps system and database administrators upgrade an existing e*Index 4.1.1 environment to version 4.5.2, including e*Index Schema files, the e*Index GUI, database, and report upgrades.
- *e*Index Initial Load User's Guide*
Provides the background information and instructions that system and database administrators need in order to load legacy data into the e*Index database, including a description of the expected data format and the Schema files included with the load program.
- *Working with Reports for e*Index Global Identifier*
Provides background information about the GUI and standard reports provided with e*Index, and explains how to modify and run the standard reports (for an Oracle installation only).

Installing the e*Index Schema Files

About this Chapter

Overview

This chapter presents the background information and the step-by-step instructions you need to install the e*Index Schemas files for e*Gate.

The following diagram illustrates the contents of each major topic in this chapter. For the page numbers on which specific topics appear, see the next page of this chapter.

**About the
e*Index Schema**

Learn about the installation process, the requirements, and the files you will install

**Install the
e*Index Schema**

Learn how to install the e*Index files in your e*Gate environment

What's Inside

This chapter provides background information and instructions related to the topics listed below.

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▶ Step 2: Install or upgrade the e*Gate	2-5
▶ Step 3: Install or upgrade the Database e*Way	2-5
▶ Step 4: Install or upgrade the e-Mail e*Way	2-6
▶ Step 5: Install the database client software	2-6
▶ Step 6: Install the e*Index Schemas files	2-6
▶ Step 7: Verify the e*Index Schemas file structure	2-16
▶ Final Notes.....	2-17

Learning About the e*Index Schema

Overview

This section of the chapter provides background information about installing the e*Index Schemas files for e*Gate.

What Do I Need to Get Started?

Installing e*Index version 4.5.2 may require some modifications to your e*Gate and Database e*Way environments. We highly recommend that a separate e*Gate and Database e*Way environment be created and tested before any modifications are made to your current working environment. Before you start you will need to have the following software from SeeBeyond for the platform with which you are working.

- e*Gate 4.5.0 or later
- The appropriate Database e*Way for version 4.5.0 or later
 - For an Oracle database, you need the Oracle e*Way
 - For a Sybase database, you need the Sybase e*Way
 - For a Microsoft SQL Server database, you need the ODBC e*Way
- HL7 Templates 4.5.0 or later (only if you process HL7 messages)
- e-Mail e*Way 4.5.0 or later (only if you will use the Event Notification function of e*Index Security)
- e*Index 4.5.2

You also need one of the following database applications, depending on the database platform you are using:

- Oracle Client version 8.1.7 (8.1.7.2.1 is recommended)
- Sybase Client version 12.0
- Microsoft SQL Server Enterprise Edition 7.0 (only client files are required)

Is the Installation Process Standard Across Platforms?

The installation procedures for Windows NT and UNIX differ slightly, but both installations begin on a machine running Windows 2000 or Windows NT 4.0 with SP 4 or later. The extensions for the dynamic link library files that are installed during this process may vary depending on the platform you are running. This guide refers to these files by the Windows extension, **.dll**. The variable **<eGate>** is used to specify your e*Gate environment on any platform.

What Files are Installed?

When you install the e*Index Schemas files for e*Gate, you have a choice of two different types of installations. You can install only the Schemas components or you can install the components plus a sample Schemas. If you install both the components and sample Schemas, you can customize the sample Schemas for use in production. If you install only the Schemas components, you can still access the sample Schemas files to use in the new Schemass you create. For a complete description of the e*Index Schemas files, see "Learning About e*Index Schema Components" in Chapter 3 of the *e*Index Global Identifier Technical Reference*.

Schema Components

If you choose not to install the sample Schemas and only install the Schemas components, the files are installed in the registry of the e*Gate server, and in the e*Gate client. On the server, the files are installed in **/eGate/Server/Registry/repository/default**. Generally, when the e*Index Schemas is upgraded, only the component files change. The ability to install the component files and sample Schemas separately allows you to perform future upgrades without overwriting your customized Schemass. Two customizable files are installed in the Schemas components: **ui-fns.monk** and **eiEvent.ssc**. Refer to the diagrams on beginning on page 2-16 for the locations of these files.

Sample Schema

If you choose to install the sample Schemas, the files are installed in the registry of the e*Gate server, and in the e*Gate client. On the server, the sample Schemas files are installed in **/eGate/Server/Registry/repository/Schemas_name/runtime**, where *Schemas_name* is the name you specify when you perform the installation. The Schemas component files are installed in **/eGate/Server/Registry/repository/default**. Refer to the diagrams beginning on page 1-16 for the locations of these files.

Installing the sample Schemas creates five e*Ways and their associated configuration files. The e*Ways include the sending e*Way, the polling e*Way, and three file e*Ways for testing the program. The sample Schemas also includes a sample Collaboration script, **uidb.dsc**, used by the sending e*Way to process incoming data. You can modify this script for use in your production environment. The sample Schemas also provides a sample Monk file, **ui-process-person.monk**, which is called by **uidb.dsc** and defines how records are initially processed. The sample Schemas provides Monk files that define database connectivity and that create the Monk lists used as parameters for the Monk APIs.

Installing the e*Index Schema Files

Overview

To install the Schemas for e*Index, you must complete the following steps:

- Step 1: Back up the e*Gate Environment
- Step 2: Install or Upgrade e*Gate
- Step 3: Install or Upgrade the Database e*Way
- Step 4: Install or Upgrade the e-Mail e*Way
- Step 5: Install the Database Client Software
- Step 6: Install the e*Index Schema Files
- Step 7: Verify the e*Index Schema File Structure

Step 1: Back up the e*Gate Environment

If you are already running e*Gate, it is important to make a FULL backup of the environment for safekeeping before making any changes to your e*Gate environment.

Step 2: Install or Upgrade e*Gate

Before you install e*Index 4.5.2, you need to either install or upgrade to e*Gate 4.5.0 or later. Follow the instructions for installing or upgrading e*Gate in the *e*Gate Integrator Installation Guide*. If you are processing HL7 messages, make sure you also install the HL7 template libraries add-on for e*Gate. If you need to modify your e*Gate environment, install e*Gate on a separate environment for testing purposes, away from your production e*Gate environment.

Step 3: Install or Upgrade the Database e*Way

Before installing e*Index 4.5.2, you need to install or upgrade to the appropriate Database e*Way version 4.5.0 or later for the database platform you are using. The Database e*Way must be installed on the e*Gate server on which you install the e*Index Schemas. For information on installing the Oracle e*Way, refer to the *e*Way Intelligent Adapter for Oracle User's Guide*. For information on installing the Sybase e*Way, refer to the *e*Way Intelligent Adapter for Sybase User's Guide*. For information on installing the ODBC e*Way (for a Microsoft SQL Server database), refer to the *e*Way Intelligent Adapter for ODBC User's Guide*.

Step 4: Install or Upgrade the e-Mail e*Way

You need to install the e-Mail e*Way only if you will be using the Event Notification function in e*Index Security (for more information, see chapter 3 of the *e*Index Security User's Guide*). For information on installing and implementing the e-Mail e*Way, refer to the *e-Mail e*Way Intelligent Adapter User's Guide*.

Step 5: Install the Database Client Software

In order for the e*Index e*Way to connect with the e*Index database, you need to install the appropriate database client software on the e*Gate host on which the e*Index Schemas is installed. This may be the registry host or a participating host. Before you install the client software, you should make sure that no previous versions of the software are installed. You need to install one of the following:

- For an Oracle database, install Oracle Client 8.1.7, including the Oracle network administration and application development tools. After you install Oracle, modify **tnsnames.ora** by adding a stanza for the new e*Index database (for more information, see "Step 13: Modify **tnsnames.ora**" in Chapter 3 of this guide).
- For a Sybase database, install Sybase Client 12.0. After you install Sybase, modify **sql.ini** by adding a stanza for the e*Index database server (for more information, see "Step 10: Modify **sql.ini**" in Chapter 4 of this guide).
- For a Microsoft SQL Server database, install Microsoft SQL Server Enterprise Edition 7.0. You only need the client files for the e*Gate server, however if you perform the installation on a Windows NT Server machine, both client and server files are automatically installed. After you install SQL Server, define an ODBC data source for the database (see "Step 8: Define the ODBC Data Source" in chapter 5 of this guide for more information).

For information about installing the database software, refer to the appropriate Oracle, Sybase, or Microsoft SQL Server documentation.

Step 6: Install the e*Index Schema Files

To begin the installation process, insert the e*Index 4.5.2 installation CD-ROM into the CD-ROM drive on your computer, and make sure no other Windows applications are running.

Important! If you choose to install all components of e*Index (e*Index Schemas files, database, reports, GUI, and documentation) at this time:

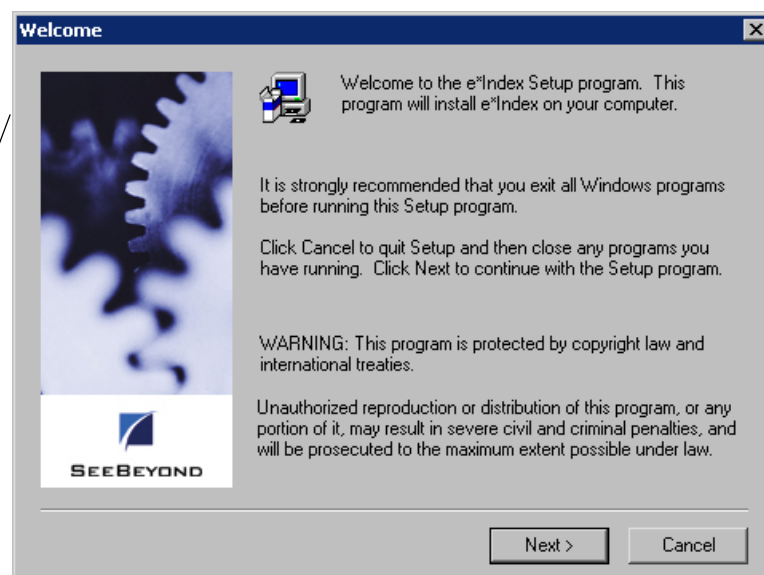
- Install the files on your Quality Workstation in the directory where you want your GUI files to reside.
 - Review the overview information and instructions for installing an e*Index database for the appropriate database platform (Oracle in Chapter 3, Sybase in Chapter 4, or SQL Server in Chapter 5) before proceeding.
 - Make sure you have the database client and server software installed prior to installing e*Index.
 - Review the diagram on page 1-10 in Chapter 1 of this guide.
-

► To install the e*Gate interface files

Before you begin:

- ✓ Complete "Step 1: Backup your e*Gate Environment" through "Step 5: Install the Database Client Software"
 - ✓ Make sure that all Windows applications are closed
- 1 Insert the e*Index installation CD-ROM into the CD-ROM drive of your computer
 - 2 If Autorun is enabled, the setup program automatically starts. Otherwise:
 - On the Windows desktop, double-click the **My Computer** icon and then open the CD-ROM directory.
 - Double-click the file name **Setup.exe** to initiate the process that installs the e*Index Schemas files. The Welcome window appears, reminding you to close all Windows programs.

e*Index is installed using a standard InstallShield Wizard



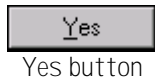
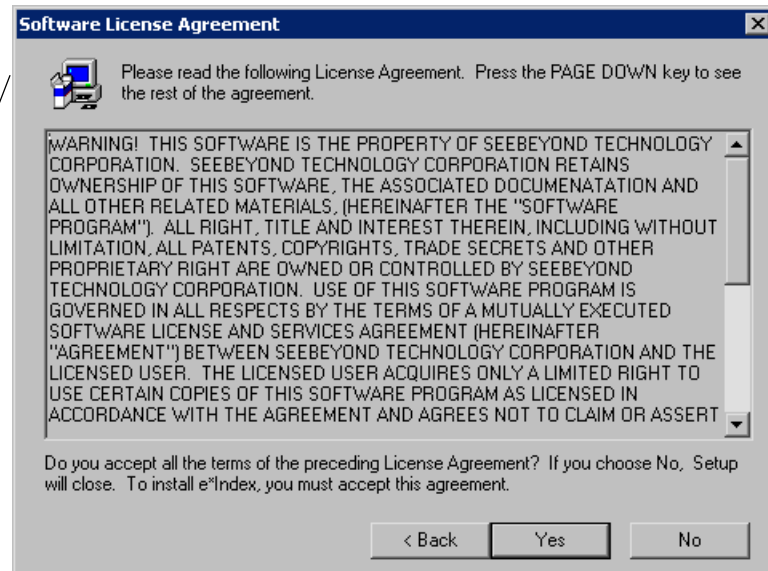
3 Do one of the following:

To close any open Windows programs, click **Cancel**, close the programs, and then repeat step 2.

To continue with the installation process without closing any external programs, click **Next**. The Software License Agreement window appears.

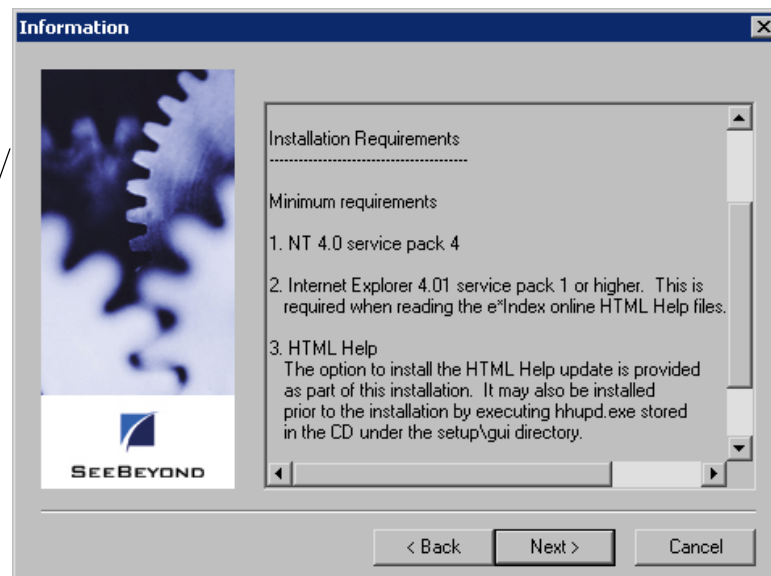


You must agree to the terms of the license agreement in order to proceed



4 If you agree to the license agreement, click **Yes**. The Information window appears with a list of requirements to remind you of the applications you need to install before installing e*Index.

The Information window reminds you to have Windows NT, Internet Explorer, and database software installed





5 Click **Next**. The User Information window appears.

Enter your name and your company name on the User Information window

The User Information dialog box has a title bar with a close button (X). On the left is a vertical image of interlocking gears. Below the image is the SeeBeyond logo. The main area contains the text: "Please enter your name and the name of the company for whom you work." Below this are two text input fields: "Name:" with the value "Gene Smythe" and "Company:" with the value "DWL". At the bottom are three buttons: "< Back", "Next >", and "Cancel".



6 In the **Name** and **Company** fields, enter your name and your company's name, and then click **Next**. The Choose Destination Location window appears.

The Choose Destination Location window displays the e*Gate client path

The Choose Destination Location dialog box has a title bar with a close button (X). On the left is a vertical image of interlocking gears. Below the image is the SeeBeyond logo. The main area contains the text: "Setup will install e*Index in the following folder. To install to this folder, click Next. To install to a different folder, click Browse and select another folder. You can choose not to install e*Index by clicking Cancel to exit Setup." Below this is a "Destination Folder" label, a text input field containing "C:\sbyn\elIndex", and a "Browse..." button. At the bottom are three buttons: "< Back", "Next >", and "Cancel".



7 Do one of the following:

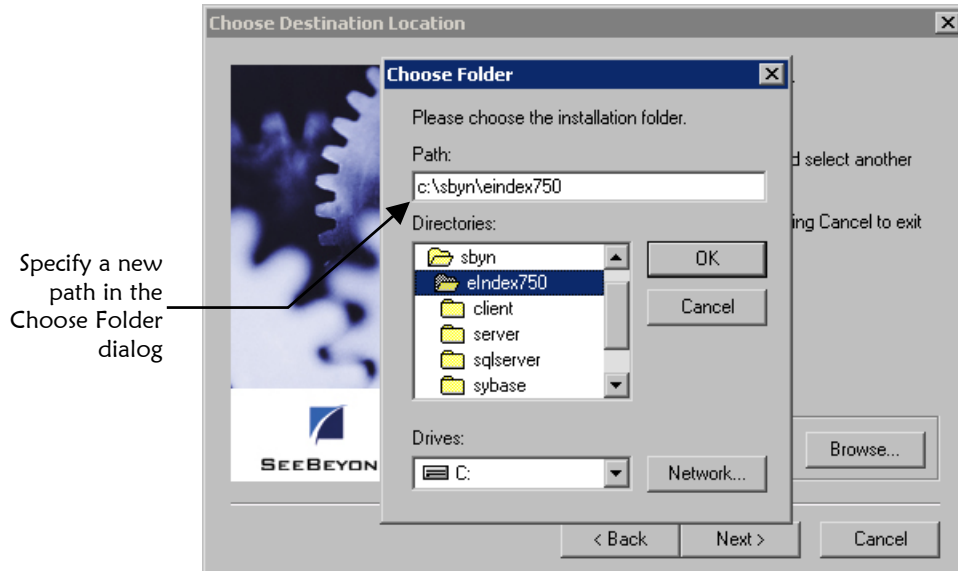
*To accept the default folder that appears in the Destination Folder path, click **Next**.*

To change the location in which the files will be installed:

- Click **Browse**.



- In the Choose Folder dialog, type or select the path where you want to install the files.
- Click **OK**. The new path you specified appears in the Destination Folder path.

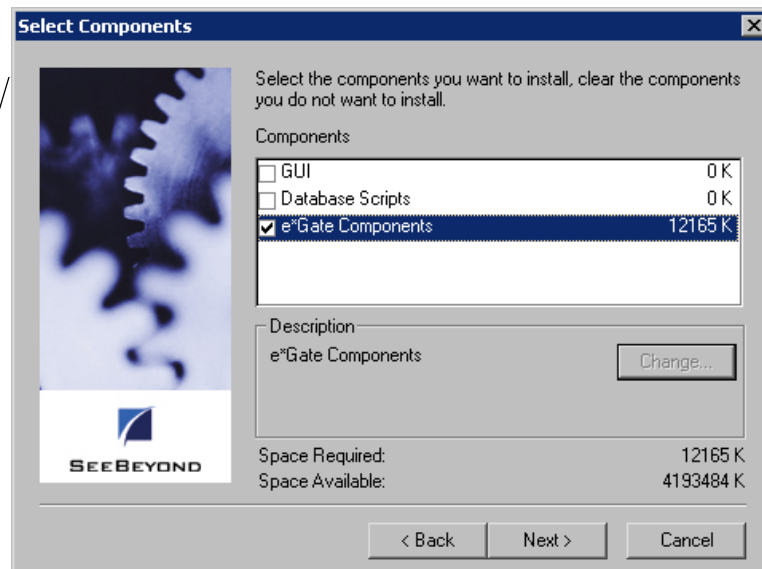


Note: If the path you specified does not exist, a dialog appears asking if you want to have the folder created. If you select **Yes**, Setup creates the specified path for you.



- 8** After you specify the installation path, click **Next** on the Choose Destination Location taskbar. The Select Components window appears.

Select the components you want to install on the Select Components window



- 9 In the Components box, select **e*Gate Components**, and make sure that no other components are selected.

Notes:

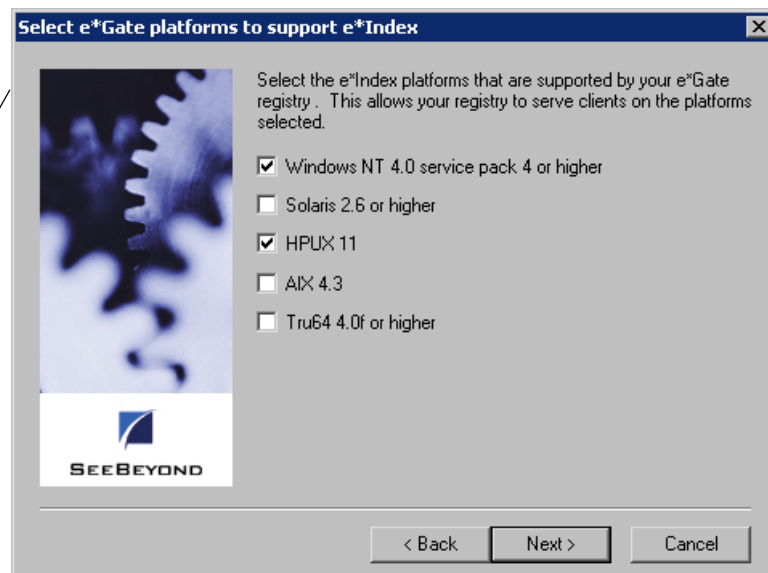
- *At the bottom of the window, the required space and the available space appears so you can see how much space each component requires compared to the space you have available on your machine.*
 - *This step only describes how to install the e*Index Schemas files. To save time, you can install all of the components of e*Index at one time by selecting every component on the Select Components window. Then, refer to the appropriate chapter to modify the files you installed. For more information, refer to the notes at the beginning of this procedure.*
-

Next >

Next button

- 10 Click **Next**. The Select e*Gate Platforms window appears.

You can specify the platforms on which your e*Gate host servers are running

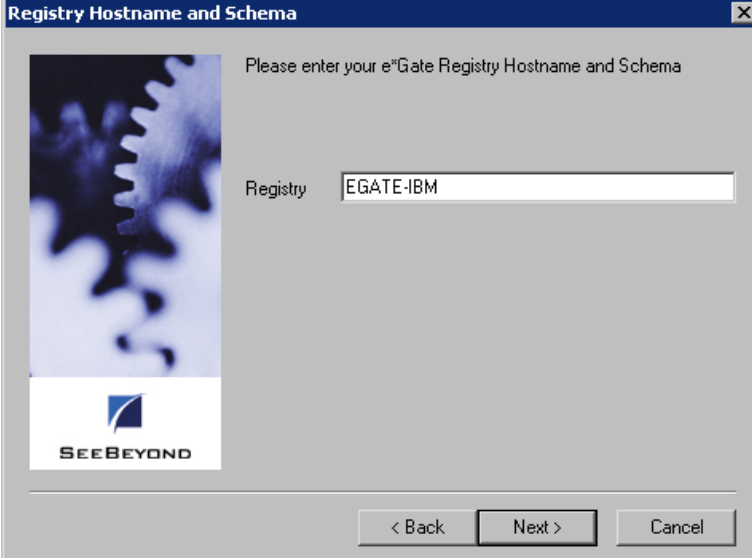


Next >

Next button

- 11 Select the platforms on which you will be running the e*Index Schemass, and then click **Next**. The Registry Hostname and Schema window appears.

On the Registry Hostname and Schema window, specify information about your e*Gate environment

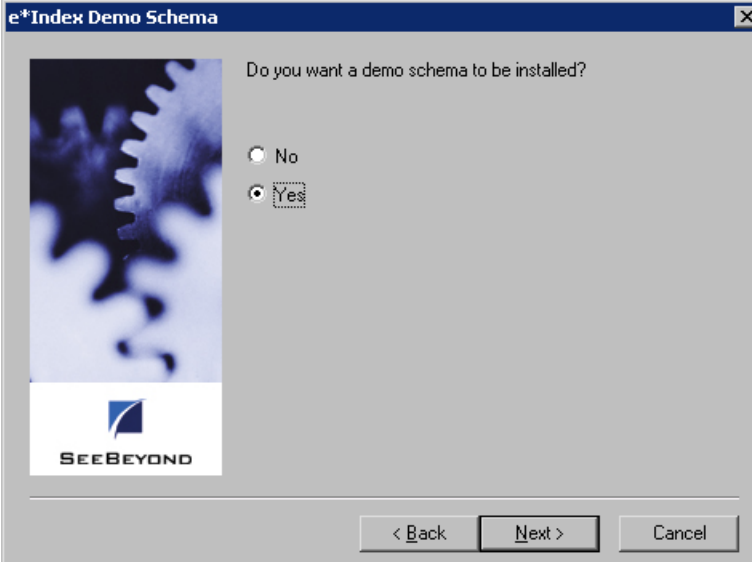


The dialog box titled "Registry Hostname and Schema" contains a "Please enter your e*Gate Registry Hostname and Schema" instruction. A text field labeled "Registry" contains the text "EGATE-IBM". The SeeBeyond logo is visible in the bottom left corner. At the bottom right, there are three buttons: "< Back", "Next >", and "Cancel".

Next >
Next button

12 In the **Registry** field, enter the name of your e*Gate registry host, and then click **Next**. The e*Index Demo Schema window appears

On the e*Index Demo Schema, specify whether you want to install a demo Schemas



The dialog box titled "e*Index Demo Schema" contains the question "Do you want a demo schema to be installed?". There are two radio button options: "No" and "Yes". The "Yes" option is selected. The SeeBeyond logo is visible in the bottom left corner. At the bottom right, there are three buttons: "< Back", "Next >", and "Cancel".

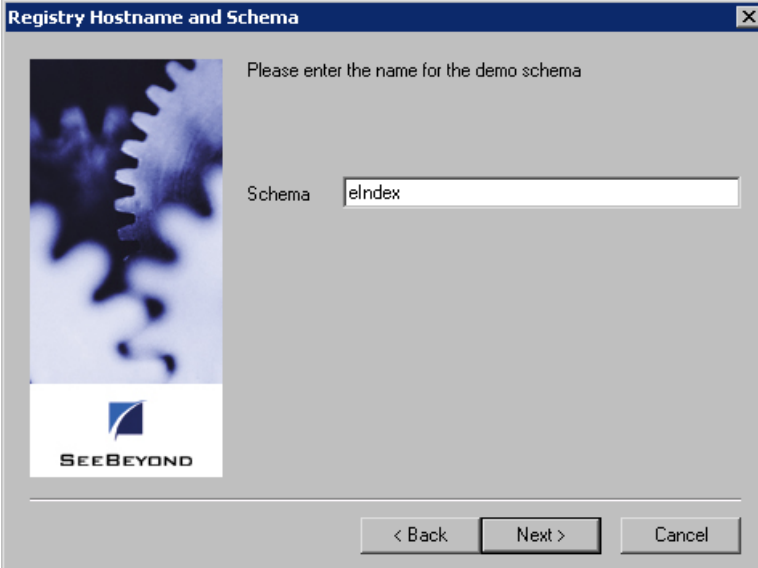
Next >
Next button

13 Do one of the following:

*To install a sample Schemas, select **Yes** and then click **Next**. The Registry Hostname and Schema window appears. Continue to step 13.*

*To skip the installation of the sample Schemas, select **No** and then click **Next**. The e*Index Administrator Account Information window appears. Skip to step 15.*

On the Registry Hostname and Schema window, specify a name for the sample Schemas



The dialog box titled "Registry Hostname and Schema" contains a blue gear graphic on the left and the SeeBeyond logo at the bottom. The main text reads "Please enter the name for the demo schema". Below this is a text input field labeled "Schema" containing the text "eIndex". At the bottom right, there are three buttons: "< Back", "Next >", and "Cancel".

Next >
Next button

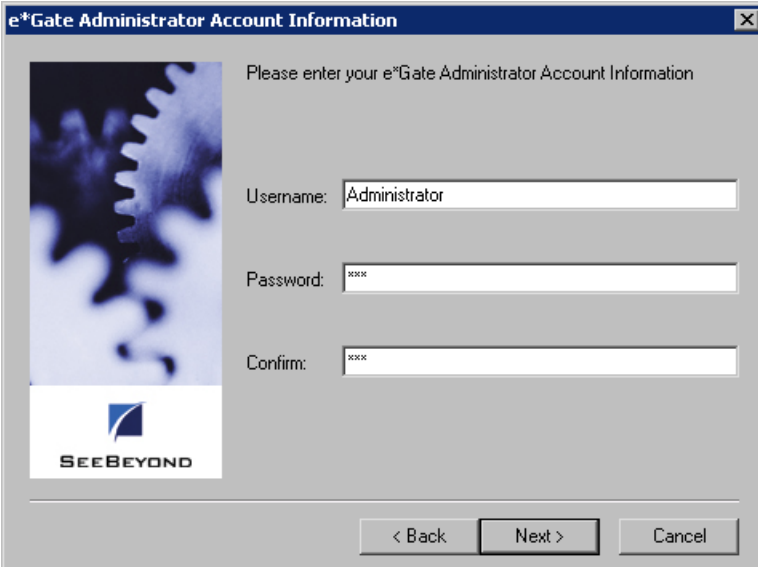
- 14** In the **Schema** field, enter a name for the sample Schemas.

***Important!** Be sure to use a unique Schemas name. If you enter the name of an existing e*Index Schemas, the new Schemas overwrites the existing Schemas files.*

Next >
Next button

- 15** Click **Next**. The e*Gate Administrator Account Information window appears.

On the e*Gate Administrator Account Information window, specify information about your e*Gate administrator account



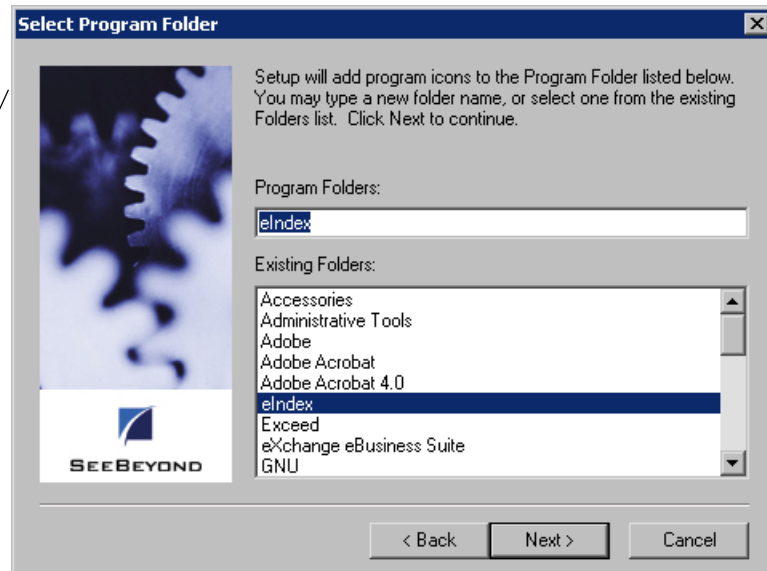
The dialog box titled "e*Gate Administrator Account Information" contains a blue gear graphic on the left and the SeeBeyond logo at the bottom. The main text reads "Please enter your e*Gate Administrator Account Information". Below this are three text input fields: "Username:" with "Administrator", "Password:" with "xxx", and "Confirm:" with "xxx". At the bottom right, there are three buttons: "< Back", "Next >", and "Cancel".

- 16** In the **Username** and **Password** fields, enter the administrator user ID and password for your e*Gate system. Re-enter the password in the **Confirm** field.



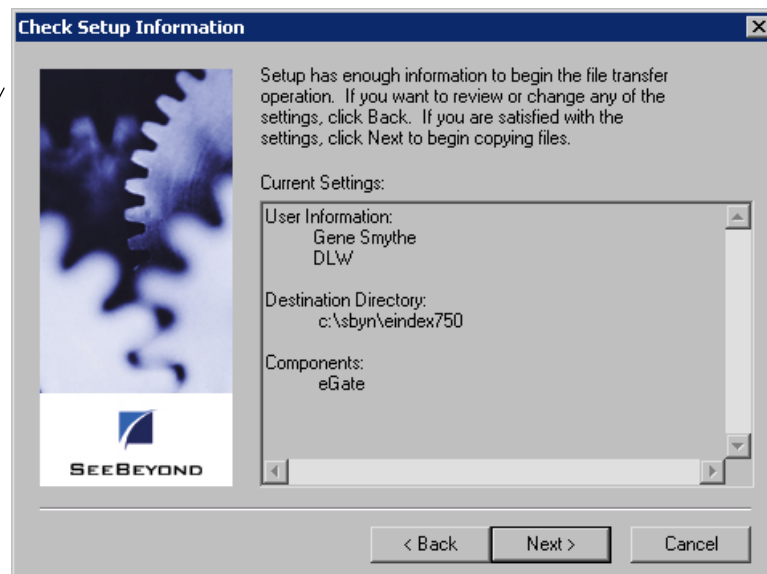
17 Click **Next**. The Select Program Folder window appears.

Select the program folder to which you want to add the e*Index icons



18 In the **Program Folders** field, enter the name of the program folder to which you want to add the e*Index icons, and then click **Next**. The Check Setup Information window appears.

On the Check Setup Information window, verify the components you are installing



19 Verify the information you specified, and do one of the following:

*To change any of the options you selected, click **Back**, and make the necessary changes.*

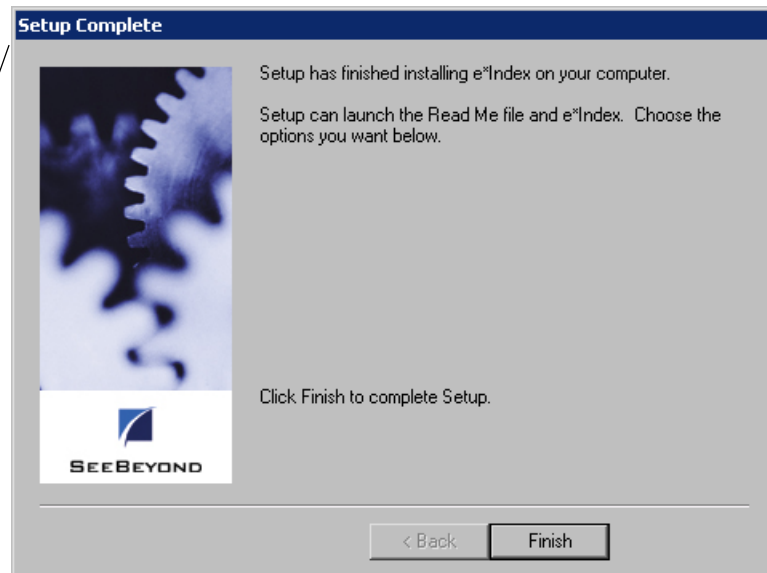


*To install the files in the specified directory, click **Next**. The Setup Complete window appears after the files are installed and committed to the e*Gate registry.*

Finish
Finish button

20 The Setup Complete window indicates that all necessary files are installed. Click **Finish** to conclude the setup process.

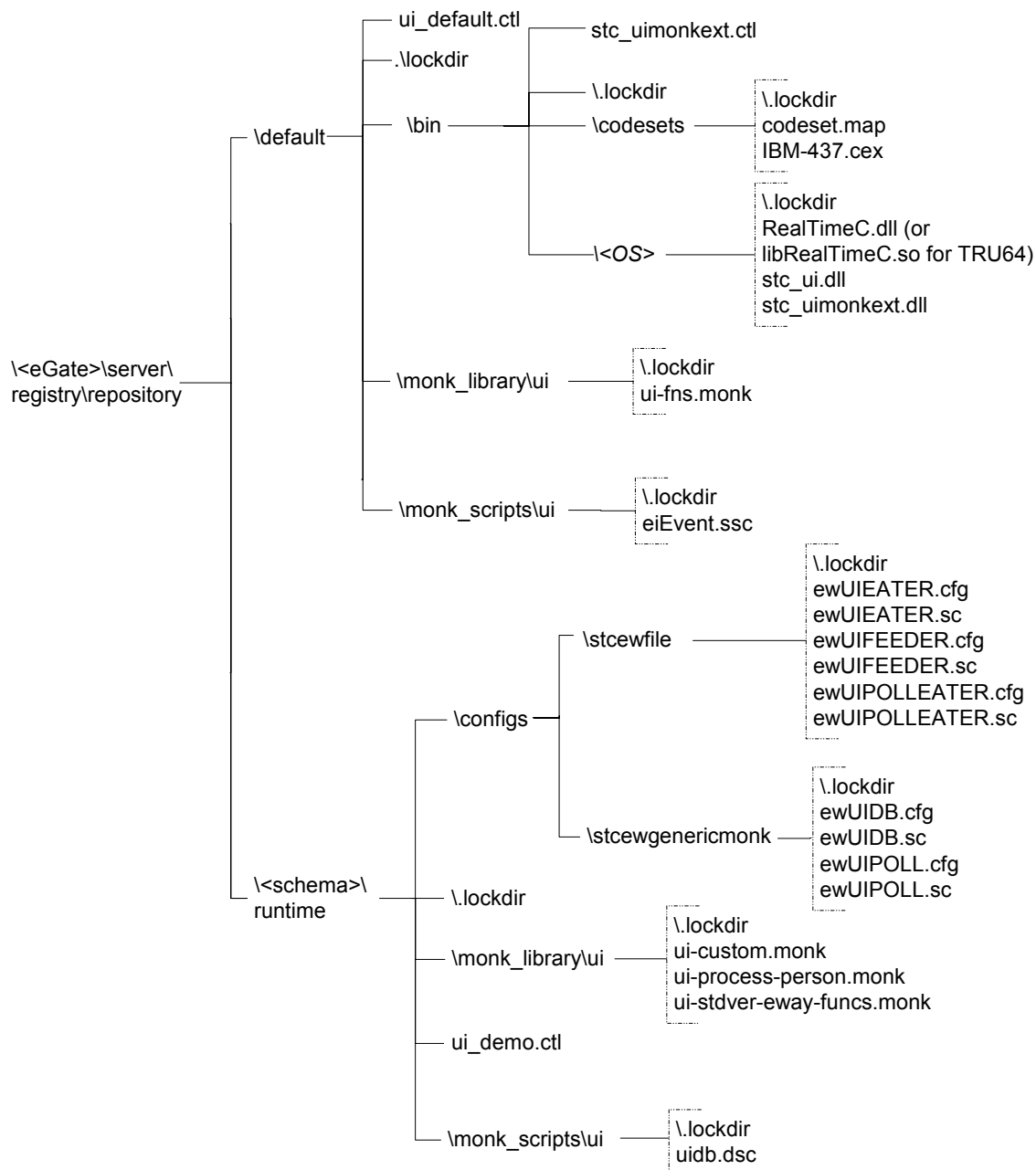
The Setup Complete window indicates that the files have been installed



21 Continue to "Step 7: Verify the e*Index Schema File Structure."

Step 7: Verify the e*Index Schema File Structure

If you installed the e*Index sample Schemas files, your file structure on the e*Gate server should resemble the illustration below. The variable *Schemas_name* refers to the name you assigned the new Schemas when you installed the files. If you only installed the Schemas components, and not the sample Schemas, only the files illustrated in the **\default** directory are installed to the e*Gate server. The file distribution was designed so when you upgrade e*Index, you usually only need to upgrade the files installed in the **\default** directory, which typically are not highly customized.



When you install the e*Index Schemas files, several sample Schemas files are copied to the installation path in `/client/eGate_Schemas/demo`. These files are only committed to the e*Gate registry if you chose to install the sample Schemas. Otherwise, they are simply copied to the installation path for you to use as a base from which to create new Schemass for your e*Index system. You can delete the sample Schemas files from the installation path if you no longer need them to create Schemass.

In addition, the Schemas component files are copied to the installation path in `/client/eGate_Schemas/default`. The files in this folder are the files that are committed to the `/<eGate>/server/registry/repository/default` directory of e*Gate (as shown in the illustration on the previous page). You can delete these files as well.

Finally, the Initial Load program for e*Index is installed in `/client/eGate_Schemas/init_load`. You can use these files when you load legacy data from your existing systems into the e*Index database. For more information, see your *e*Index Initial Load User's Guide*.

Final Notes:

Before you can use your e*Index Schemas in a production environment, you may need to customize the following Schemas files to suit your processing requirements. Most of these modifications can be performed on the e*Gate editors or a standard text editor, and should be only performed by one who is familiar with e*Gate Schemass and processes.

- uidb.dsc
- eiEvent.ssc
- ewUIDB.cfg
- ewUIPOLL.cfg
- ui-custom.monk
- ui-fns.monk
- ui-process-person.monk
- ui-stdver-eway-funcs.monk

Refer to chapters 3 and 4 of your *e*Index Global Identifier Technical Reference* for more information about customizing these files. Chapter 5 also contains information about modifying **ui-custom.monk**.

Before you use e*Index in a production environment or load any legacy data, you should have the Vality algorithm files configured by SeeBeyond or Vality. See your SeeBeyond Project Manager for additional information.

Installing an Oracle Database

About this Chapter

Overview

This chapter presents the background information and the step-by-step instructions you need to install an e*Index 4.5.2 database for Oracle. The following diagram illustrates the major topics in this chapter. For the page numbers on which specific topics appear, see the next page of this chapter.

About the Installation	Learn about installing and modifying the database and reports files
Create the Database	Learn how to install the database files, and to modify and run the database scripts
Physical Data Model	View a physical data model of the e*Index database

What's Inside

This chapter provides background information and instructions related to the topics listed below.

Learning About the Database Installation	3-3
Creating the Database.....	3-5
▶ Step 1: Obtain Database Information	3-5
▶ Step 2: Install Oracle Server.....	3-6
▶ Step 3: Install the Database and Report Files	3-6
▶ Step 4: Copy the Files to the Database Server	3-11
▶ Step 5: Create the Database Path.....	3-12
▶ Step 6: Modify defs.sql	3-13
▶ Step 7: Modify initSID.ora	3-14
▶ Step 8: Modify create1(.bat)	3-15
▶ Step 9: Modify listener.ora	3-17
▶ Step 10: Run create1(.bat)	3-18
▶ Step 11: Move the Report Files	3-20
▶ Step 12: Copy the Database Files to the Client Workstation	3-20
▶ Step 13: Modify tnsnames.ora	3-21
▶ Step 14: Modify create2.bat	3-22
▶ Step 15: Modify install_ssap.bat (optional).....	3-23
▶ Step 16: Run create2.bat	3-24
▶ Step 17: Run install_ssap.bat (optional).....	3-25
e*Index 4.5.2 Physical Data Model	3-26

Learning About the Database Installation

Overview

This section of the chapter provides background information about the files you install, modify, and execute to create an e*Index 4.5.2 database.

What do I Need to Know Before I Start?

Before beginning, you should determine the path in which you want the database to reside, the name you want to assign the database, and the administrator password for the database. You should also gather information about the database size requirements because you will need to specify the tablespace sizes before running the installation scripts. It is helpful to be familiar with your Oracle environment, Oracle networking, and Oracle database administration.

How is the Installation Performed?

Installing the database files creates several SQL scripts that you use to create and test the new database. You will execute two batch files, **create1.bat** (or **create1** in UNIX) and **create2.bat**, that call the SQL scripts and install the database. You run **create1.bat** from the database server to create a database instance for your e*Index database. **create2.bat** is run from a client workstation, and creates the actual e*Index database tables, views, indexes, and so on. You can run an optional script, **install_ssap.bat**, from a client workstation to install the region-specific security functionality (for more information about region-specific security, see Chapter 3 of the *e*Index Security User's Guide*). If your database server runs on Windows NT, you can run **create2.bat** and **install_ssap.bat** from the database server instead.

How do I Customize the Installation Files?

Installing a new e*Index 4.5.2 database requires a few modifications to the database scripts and related files in order to install the database in the correct location. You need to specify an Oracle SID name for the database. Make sure the name you select is different from the Oracle SID name of the default database included with the Oracle installation. You will need to modify the following files: **defs.sql**, **initSID.ora**, **tnsnames.ora**, **listener.ora**, **create1(.bat)**, **create2.bat**, and optionally **install_ssap.bat**. Each modification is described in the appropriate procedure later in this chapter. We recommend that these changes be made by an Oracle database administrator.

What are e*Index Reports?

The e*Index installation for Oracle provides a standard set of database reports. The reports are run daily, and report on the day-to-day changes to the database. These reports tell you whether any potential duplicates were found, whether merges or unmerges took place, whether duplicate SSNs were found, and so on. If your database resides on a UNIX server, SeeBeyond can supply you with a UNIX cron job so that your production reports run automatically.

Creating the Database

Overview

To install an e*Index 4.5.2 database for Oracle, you must complete the following steps:

- Step 1: Obtain Database Information
- Step 2: Install Oracle Server
- Step 3: Install the Database and Report Files
- Step 4: Copy the Files to the Database Server
- Step 5: Create the Database Path
- Step 6: Modify **defs.sql**
- Step 7: Modify **initSID.ora**
- Step 8: Modify **create1(.bat)**
- Step 9: Modify **listener.ora**
- Step 10: Run **create1(.bat)**
- Step 11: Move the Report Files
- Step 12: Copy the Database Files to the Client Workstation
- Step 13: Modify **tnsnames.ora**
- Step 14: Modify **create2.bat**
- Step 15: Modify **install_ssap.bat** (optional)
- Step 16: Run **create2.bat**
- Step 17: Run **install_ssap.bat** (optional)

Note: If you chose to install all components of e*Index when you installed the e*Index schema files, you should have already completed steps 1 through 3. You can begin with “Step 4: Copy the Files to the Database Server.”

Step 1: Obtain Database Information

Before beginning, determine the server name and path in which you want to install the e*Index database, and the Oracle SID name you want to assign the new database. Make sure the SID name you select is different from the SID name assigned to the default database included with the Oracle installation. Before beginning the database installation, analyze your database size

requirements because you must specify the tablespace sizes before running the installation scripts. The file **defs.sql** lists the tablespaces you need to size, and is described later in this chapter. Finally, determine whether you need to install region-specific security (described in Chapter 3 of the *e*Index Security User's Guide* and the *e*Index Administrator User's Guide*).

Because of the complex nature of creating a database, we recommend that a database administrator perform the following steps.

Step 2: Install Oracle Server

Before you install the e*Index database files, Oracle 8.1.7 Server must be installed on the database server. When you install Oracle, make a note of the path in which you install the program. You will need to specify this information later in the database installation files. For information about installing Oracle Server, refer to the appropriate installation documentation for Oracle.

If you are installing the database on a Unix machine, you need to execute one file, **create2.bat**, from a client workstation. You must install Oracle 8.1.7 Client on the machine from which you will run **create2.bat**.

Important! *It is crucial that the Oracle Server installation is operational prior to performing the following steps.*

Step 3: Install the Database and Report Files

Installing the database and report files is very similar to the process you followed to install the e*Index schema files. You can install the e*Index database files using one of the following scenarios:

- Install the files on a Windows NT database server
- Install the files on a client workstation and copy them to a Unix database server
- Map a network drive from a client workstation to a Unix database server, and install the files to that drive

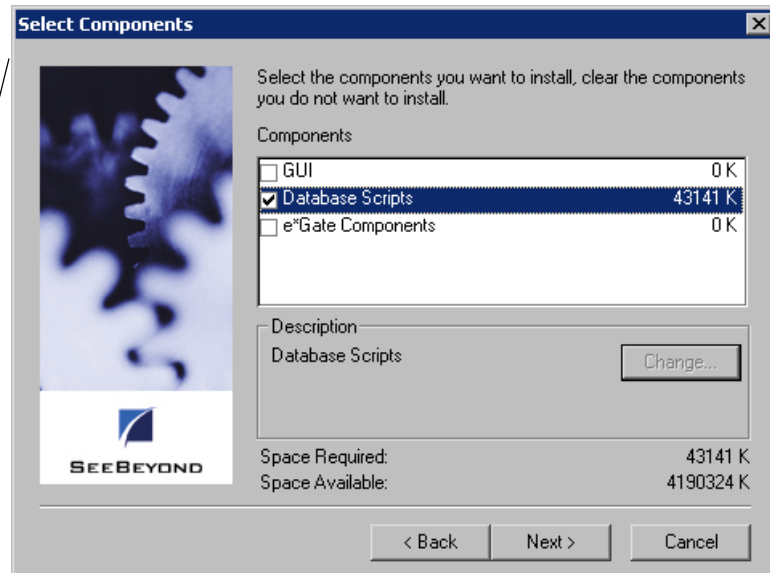
▶ To install the database and report files

Before you begin:

- ✓ Complete "Step 2: Install Oracle Server"
- ✓ Make sure the e*Index installation CD-ROM is inserted into the CD-ROM drive of your computer

- 1 Follow steps 1 through 7 under "Step 6: Install the e*Index Schema Files" in Chapter 2, "Installing the e*Index Schema Files." The Select Components window should now be visible.
- 2 In the Components box, select the check box next to **Database Scripts**.

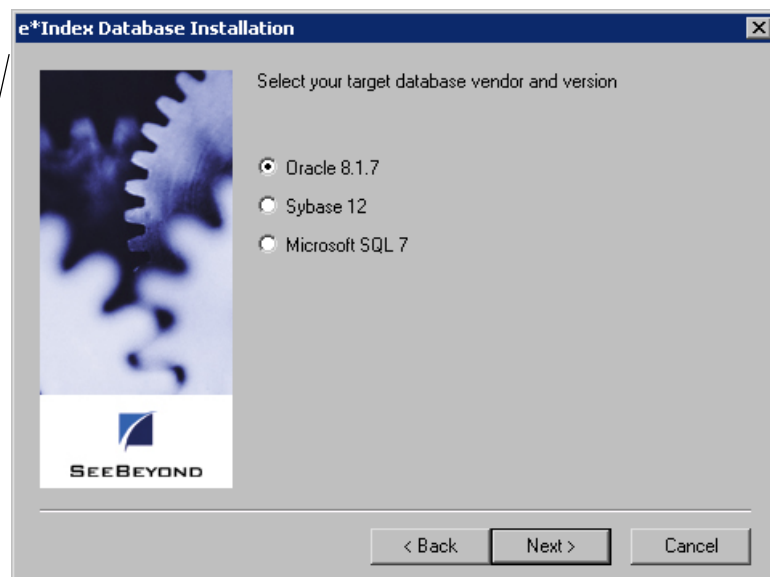
Select the components you want to install on the Select Components window



Next >
Next button

- 3 Click **Next**. The e*Index Database Installation window appears.

On the e*Index Database Installation window, specify your database platform

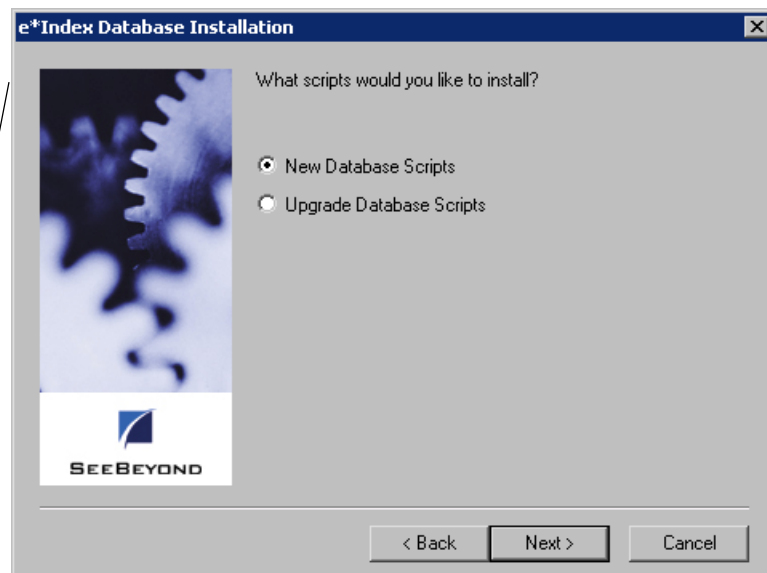


- 4 Select the name of the database platform you are using (Oracle, Sybase, or Microsoft SQL Server).



- 5 Click **Next**. The second e*Index Database Installation window appears.

On the next e*Index Database Installation window, specify that this is a new installation of e*Index

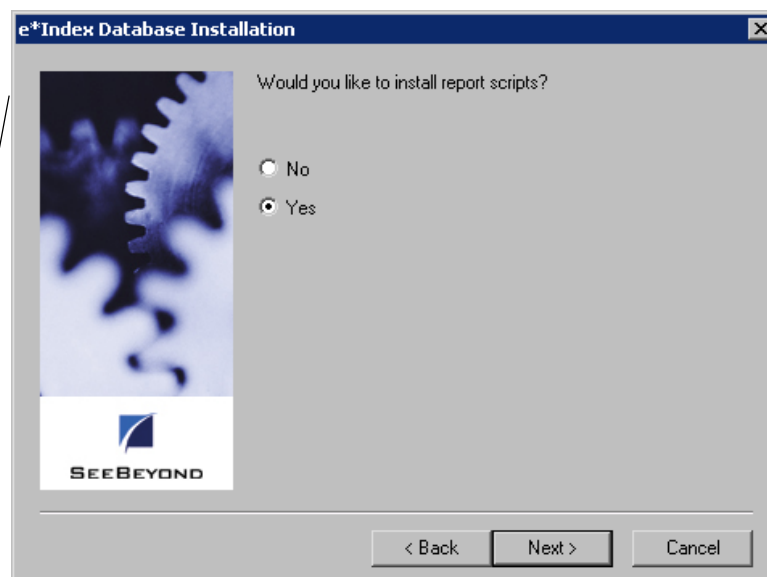


- 6 Select **New Database Scripts** to specify that you are creating a new database.



- 7 Click **Next**. The final e*Index Database Installation window appears.

On the next e*Index Database Installation window, specify whether you want to install reports

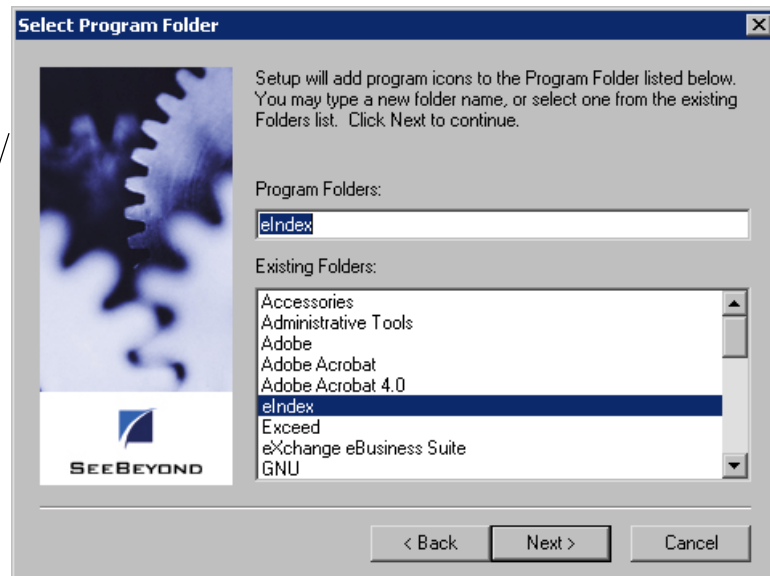


- 8 Select **Yes** to install the report files, or select **No** if you do not want to install the report files.



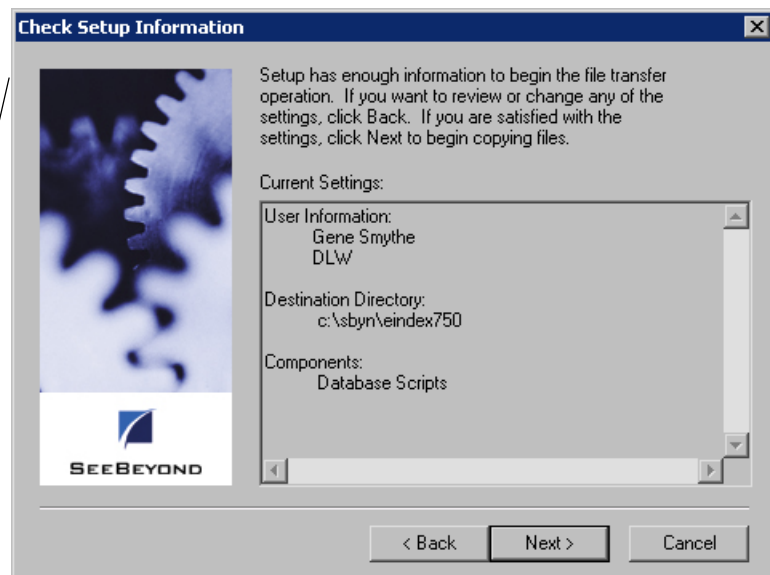
- 9 Click **Next**. The Select Program Folder window appears.

Specify the folder in which to install the program icons on the Select Program Folder window



- 10** Enter the name of the folder into which you want to install the program icons or accept the default name, and then click **Next**. The Check Setup Information window appears.

Verify the information you specified on the Check Setup Information window



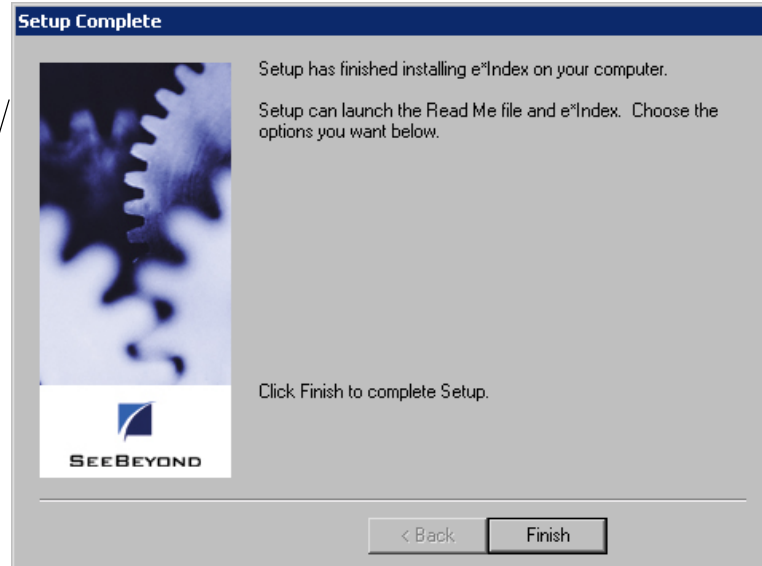
- 11** Verify the information you specified, and do one of the following:

*To change any of the options you selected, click **Back**, and make the necessary changes.*

*To continue with the installation, click **Next**. When all files are installed, the Setup Complete window appears.*



The Setup Complete window indicates that the database files are installed



Finish button

12 Click **Finish** to complete the setup process.

13 To view the database files that were installed:

- Open Windows Explorer and navigate to the path you specified for the installation files.
- Open the `\server\dbcommon` subdirectory. You will find two subdirectories, `server` and `client`, and one file, `defs.sql`. The Client directory contains the database scripts `create2.bat`, `install_ssap.bat`, and `remove_ssap.bat`. The `server` directory contains the files you need to create the database instance on your server.

***Important!** If you installed these files into a Unix environment, make sure that you have read, write, and execute privileges for all of the files in the server directory for both your Unix account and your Oracle account. Also, make sure the `bin` folder in the Oracle home directory is defined in your path.*

14 To view the report files that were installed:

- Open Windows Explorer and navigate to the path you specified for the installation files.
- Open the `\server\UIreports` subdirectory. This directory contains a subdirectory named **Production**, which contains all the report files.

15 Do one of the following:

If you installed the database files on a machine other than the database server, continue to "Step 4: Copy the Files to the Database Server."

If you installed the database files on the database server, continue to "Step 5: Create the Database Path."

Step 4: Copy the Files to the Database Server

If you did not install the database files on the database server (as would be the case if you installed all e*Index files at once on a client machine), you need to copy the files to the database server in order to create the database instance.

Important! *If you copy the files into a Unix environment, make sure that you have read, write, and execute privileges for all of the files in the server directory for both your Unix account and your Oracle account. Also, make sure the **lbin** folder in the Oracle home directory is defined in your path.*

► To copy the files to the database server

Before you begin:

- ✓ Complete "Step 3: Install the Database and Report Files"
- ✓ Create the path into which you want to copy the database files. This can be any path on the database server.

- 1** Copy the entire folder named **server** that was created in the installation path from step 3 above to the path you created on the database server. This folder includes the subdirectories **dbcommon**, **dbtools**, **Uinitial**, and **UIreports**.
- 2** Once you have copied the files to the database server, continue to "Step 5: Create the Database Path."

Note: *Make a note of the path into which you copy the files. You will need to enter this path for the variable **INSTALL_HOME** in the **create1** or **create1.bat** file.*

Step 5: Create the Database Path

If you did not install the database and report files in the path in which you want the database to reside, you need to create the folders for the database path.

► To create the database path

Before you begin:

- ✓ If necessary, complete "Step 4: Copy the Files to the Database Server"
- ✓ Determine the path in which you want to create your database on the database server
- ✓ Determine the Oracle SID name you will use for the database (make sure the name you choose is different than that of the default Oracle database included with the Oracle installation)

- 1 On the database server, create the path in which you want the database to reside. This is the path you will specify in the file **defs.sql** in "Step 6: Modify **defs.sql**." The final folder in the database directory should be the Oracle SID name of the database. The path shown below illustrates the path you would create for the variables defined in the **defs.sql** example in the example on page 3-13.



Note: A folder named **database** will be created at the end of this path after you run the database installation files. The e*Index database is created in the **\database** folder. Remember that pathnames are case-sensitive on Unix servers.

- 2 Continue to "Step 6: Modify **defs.sql**".

Step 6: Modify defs.sql

The file **defs.sql** defines certain variables used by the setup scripts to determine where structures are placed and how storage is allocated. Use this file to define tablespace sizes as well.

Notes:

- View your **defs.sql** file for a complete list of tablespace variables that you can modify, along with the default values.
 - We recommend that you establish a distributed database. Please refer to the appropriate Oracle user documentation to help determine the most efficient method of distributing the database.
 - This step should be performed by a database administrator.
-

► To modify the defs.sql file

Before you begin:

- ✓ Complete "Step 5: Create the Database Path" or verify that the path to your database home directory exists. The name of the last folder in the path must be the same as the Oracle SID name.
- 1 On the database server, navigate to the path you specified when you installed your database files, or, if you copied the files to the database server, navigate to the path in which you copied the database files. Open the subdirectory **\server\dbcommon**.
 - 2 In the **dbcommon** directory, make a backup copy of the **defs.sql** file and then open the **defs.sql** file in any text editor.
 - 3 Replace the sample value for **define SID** with the SID name of the e*Index database, leaving the double quotes around the name.
 - 4 Replace the sample value for **define DB_HOME** with the path you created in "Step 5: Create the Database Path" omitting the final directory with the database SID name. Remember that pathnames are case-sensitive in Unix environments.

The excerpt from **defs.sql** below illustrates sample definitions for the **define SID** and **define DB_HOME** variables. These variables reflect the sample path displayed previously in "Step 5: Create the Database Path."

```
define SID = "EI01"  
define DB_HOME = "D:\oracle\ei"  
define LOG_FILE_HOME = "&DB_HOME\&SID\database"  
define TBL_SP_HOME = "&DB_HOME\&SID\database"
```

Notes:

- *If you are modifying this file for a UNIX installation, remember to change any back slashes ("\"") to forward slashes ("/") in the path names. Make this change for all paths listed in this file. Also remember that pathnames are case-sensitive.*
 - *Unless you specify new paths for the log files and tablespaces, they are installed in <DB_HOME>\<SID>\database. The path you enter in DB_HOME is referred to as the database home directory.*
 - *Make sure you leave the double quotes around the pathname and, for Windows NT only, enter the database drive at the beginning of the database path (as shown above).*
-

- 5 Verify or modify the tablespace sizes for your database as required for your specific installation. The sample values in this file represent the minimum values. This step should be performed by a database administrator who is familiar with your processing requirements and can best determine the tablespace sizes required by your database. Refer to your Oracle documentation for more information.
-

Important! Do not change the file names in the sections **Log File Paths** and **Tablespace Paths**.

- 6 Save and close the file, and continue to "Step 7: Modify **initSID.ora**."

Step 7: Modify **initSID.ora**

The file **initSID.ora** defines where your dump folders will be created, and allows you to customize certain parameters for the database.

► To modify the **initSID.ora** file

Before you begin:

- ✓ Complete "Step 6: Modify **defs.sql**"

- 1 On the database server, navigate to the path you specified when you installed your database files, or, if you copied the files to the database server, navigate to the path in which you copied the database files. Open the subdirectory **\server\dbcommon\server**.
- 2 Make a backup copy of the file **initSID.ora**, and then change the name of **initSID.ora** by replacing "SID" with the Oracle SID name of the database. For example, if the Oracle SID name of the database is **EI01**, the new file name for **init<SID>.ora** would be **initEI01.ora**.
- 3 Open **init<SID>.ora** in any text editor.

- 4 Enter the Oracle SID name in the **db_name** variable.
- 5 Modify the pathnames specified for the variables **control_files**, **background_dump_dest**, and **user_dump_dest** to the paths where you want the control and dump files to be created. For Windows NT, include the drive designations in the pathnames you specify. For Unix, remember that the pathnames are case-sensitive.

The excerpt below from **initSID.ora** provides an example of the above variables.

```
db_name = EI01
control_files = (d:\oracle\ei\EI01\database\control01.ct1,
d:\oracle\ei\EI01\control02.ct1)
background_dump_dest = d:\oracle\ei\EI01\database\bdump
user_dump_dest = d:\oracle\ei\EI01\database\udump
```

Notes:

- The file **initSID.ora** specifies how the database will be distributed. A database administrator should determine how the variables should be modified.
 - If you are modifying this file for a UNIX database, remember to change back slashes ("**) to forward slashes ("**) in the path names.****
 - When you make modifications to the **control_files** path, do not remove the parentheses around the path names.
-

- 6 Modify the parameters in this file according to the instructions provided in the file header. For each parameter you need to specify, examples are provided for different database sizes.

Note: We recommend that this step be performed by a database administrator. Refer to your Oracle documentation for more information about the appropriate values to enter for the parameters in this file.

- 7 For Unix installations, comment out the following line:
remote_login_passwordfile = shared
- 8 Continue to "Step 8: Modify **create1(.bat)**."

Step 8: Modify **create1(.bat)**

The file **create1.bat** (or **create1** for UNIX) is a batch file that you run to create your database instance. You need to modify certain variables in this file that tell the script where to create the database. These modifications are different for a database on UNIX than a database on Windows NT.

► To modify create1.bat for a Windows NT database installation

Before you begin:

- ✓ Complete "Step 7: Modify **initSID.ora**"
- 1 On the database server, navigate to the path you specified when you installed your database files, or, if you copied the files to the database server, navigate to the path in which you copied the database files. Open the subdirectory `\server\dbcommon\server`.
- 2 Make a backup copy of the **create1.bat** file.
- 3 Right-click on the **create1.bat** file, and then select **Edit** from the drop-down list that appears. Do not double-click the file to open it.
- 4 Make the following modifications:
 - Enter your database name in the variable **ORACLE_SID**.
 - In the variable **ORACLE_HOME**, enter the path to the Oracle home directory on your database server, including the drive designation.
 - In the variable **DBDRIVE**, enter the drive designation on the database server on which your database will reside.
 - In the variable **DB_HOME**, enter the path to your database home directory (this is the same path you specified for **DB_HOME** in **defs.sql** in step 5), and begin the path with a backslash. Do not include the drive designation in this path, and do not include the Oracle SID name at the end of the path.
 - In the variable **INSTALLDRIVE**, enter the drive on which the database installation scripts are located.
 - In the variable **INSTALL_HOME**, enter the path in which you installed or copied the database installation files. Begin the path with a backslash, and do not include the drive designation. This is the path to the **server** directory (do not include `/server/dbcommon/server` in the pathname).

An example of the above variables would appear similar to this:

```
SET ORACLE_SID=EI01
SET ORACLE_HOME=C:\ORANT
SET DBDRIVE=D:
SET DB_HOME=\ORACLE\EI
SET INSTALLDRIVE=D:
SET INSTALL_HOME=\TEMP\INSTALL
```

- 5 Save and close the file. Continue to "Step 9: Modify **create2.bat**."

► To modify create1 for a UNIX database installation

Before you begin:

- ✓ Complete "Step 7: Modify **initSID.ora**"
 - ✓ For Unix, you may need to change some folder names where the database installation files are located. Make sure that the **dbcommon** and **server** folder names do not include any capital letters.
- 1 On the database server, navigate to the path you specified when you installed your database files, or, if you copied the files to the database server, navigate to the path in which you copied the database files. Open the subdirectory **/server/dbcommon/server**.
 - 2 Make a backup copy of **create1** and then open **create1** in any text editor.
 - 3 Make the following modifications:
 - Enter your database name in the variable **ORACLE_SID**.
 - In the variable **DB_HOME**, enter the path to your database home directory (this is the same path you specified for **DB_HOME** in **defs.sql** in step 5). Do not include the Oracle SID name at the end of the path.
 - In the variable **INSTALL_HOME**, enter the path where the database installation files are located on the database server. This is the path to the **server** directory (do not include **/server/dbcommon/server** in the pathname).

Note: In a Unix environment, these variables are case-sensitive.

An example of the above variables would appear similar to this:

```
setenv ORACLE_SID ei01
setenv DB_HOME /oracle/ei
setenv INSTALL_HOME /tmp/install
```

- 4 Save and close the file. Continue to "Step 9: Modify **listener.ora**."

Step 9: Modify listener.ora

Before running the database batch files, you need to customize **listener.ora** and then restart it. This file is located in the Oracle home directory in the **\network\admin** subdirectory on your database server.

► To modify listener.ora

Before you begin:

- ✓ Complete "Step 8: Modify **create1(.bat)**."

- 1 On the database server, navigate to the Oracle home directory, open the or \network\admin subdirectory, and make a backup copy of **listener.ora**.
- 2 Open the file **listener.ora** in any text editor.
- 3 Append a **SID_DESC** and **SID_NAME** to the **SID_LIST_LISTENER** section at the end of the file, entering your SID name, as illustrated below. Your file may differ slightly from this example depending on the version of Oracle you are running and how your Oracle environment is configured.

Add the database
SID name to
listener.ora

```

SID_LIST_LISTENER =
  (SID_LIST =
    (SID_DESC = ...
    )
    (SID_DESC =
      (GLOBAL_DBNAME = ei01.world)
      (ORACLE_HOME = C:\Orant)
      (SID_NAME = EI01)
    )
  )

```

Note: If you did not configure the Listener with the database server information in the first section of the file (the Listener description list), you should do so now. Refer to the appropriate Oracle documentation to configure this section.

- 4 Save and close **listener.ora**.
- 5 Stop and then restart Listener. In Windows NT, open the Control Panel and select **Services** to do this. In Unix, use the utility **lsnrctl** to stop and restart Listener.
- 6 Continue to "Step 10: Run **create1(.bat)**."

Step 10: Run create1(.bat)

You are now ready to run the script to install your database instance. This may take several minutes depending upon the size of your installation. This script must be run from the server on which the database will reside.

Tip: By default, the database is created using the character set specified by the Regional Settings on the database server. To specify a new character set, you need to add this line "CHARACTER SET "<set_code>" before the line "NOARCHIVELOG;" in the file `create_db_step1_*.sql`, where <set_code> is the code for the character set you want to use (such as WE8ISO8859P1). `create_db_step1_*.sql` is located in the same directory as `create1(.bat)`.

▶ To run create1.bat for a Windows NT database

Before you begin:

- ✓ Complete "Step 9: Modify `listener.ora`"
- 1 On your database server, navigate to the path in which the database files are located, and then to the `\server\dbcommon\server` directory.
- 2 Double-click the `create1.bat` file. The database script begins to execute. This will take several minutes (approximately 20 to 30 minutes).

Note: You can also run this file from an MS-DOS command prompt, which gives you more control over the display of the batch file process.

- 3 Check the log files in `\server\dbcommon\server` to verify the process was successful. In `startup.log`, verify that the Oracle instance started. In `create_db_step1.log`, verify that the database was created.
- 4 Continue to "Step 11: Move the Report Files"

▶ To run create1 for a UNIX database

Before you begin:

- ✓ Complete "Step 9: Modify `listener.ora`"
- ✓ Make sure you are logged on as the Oracle Administrator user, and that the Oracle Administrator user has read, write, and execute permissions for all files and folders in the `/server/dbcommon` path.
- ✓ Make sure that the path to the Oracle home directory is defined in your path. The Oracle `bin` path needs to be defined as well.
- 1 On your database server, navigate to the path in which the database files are located, and then to the `/server/dbcommon/server` directory.
- 2 At the Unix prompt, type `create1`. The database script begins to execute. This will take several minutes (approximately 20 to 30 minutes).

Note: If the path in which `create1` is located has not been defined in your path, then you need to type `./create1` to run the file.

- 3 Check the log files in `/server/dbcommon/server` to verify the process was successful. In `startup.log`, verify that the Oracle instance started. In `create_db_step1.log`, verify that the database was created.
- 4 Continue to "Step 11: Move the Report Files."

Step 11: Move the Report Files

To complete the installation on the database server, move the report files out of the installation path, and into the database path.

▶ To move the report files

Before you begin:

- ✓ Complete "Step 10: Run `create1(.bat)`"
- 1 On the database server, navigate to the path you specified when you installed your database files, or, if you copied the files to the database server, navigate to the path in which you copied the database files.
 - 2 Open the subdirectory `\server`.
 - 3 Move the folder **UIreports** into the database path (the path that was created in "Step 5: Create the Database Path").
 - 4 Continue to "Step 12: Copy the Database Files to the Client Workstation."

Note: If your database resides on a UNIX server, SeeBeyond can supply you with a UNIX cron job so your production reports run automatically.

Step 12: Copy the Database Files to the Client Workstation

The files `create2.bat` and `install_ssap.bat` must be run from a machine running a Windows operating system. If you installed the database files on a Unix database server, or if you removed the files from the client workstation, copy the database files to a client workstation that is running Windows NT 4.0 with SP4 or higher, Windows 95, or Windows 98.

Note: If your database server is running Windows NT, you can skip this step and perform the remaining steps on the database server.

▶ To copy the files to the client workstation

Before you begin:

- ✓ Complete "Step 11: Move the Report Files"

- ✓ Create the path into which you want to copy the database files. This can be any path on the client workstation
- 1 Copy the entire folder named **server** to the client workstation. This folder is located in the path to which you copied the database files on the database server, and includes the subdirectories **dbcommon**, **dbtools**, and **UIinitial**.
- 2 Once you have copied the files to the database server, continue to "Step 13: Modify **tnsnames.ora**."

Note: Make a note of the path into which you copy the files. You will need to enter this path for the variable **INSTALL_HOME** in the **create2.bat** and **install_ssap.bat** files.

Step 13: Modify **tnsnames.ora**

In order to run **create2.bat**, you need to create a stanza in the Oracle client file **tnsnames.ora** that points to the database you are creating.

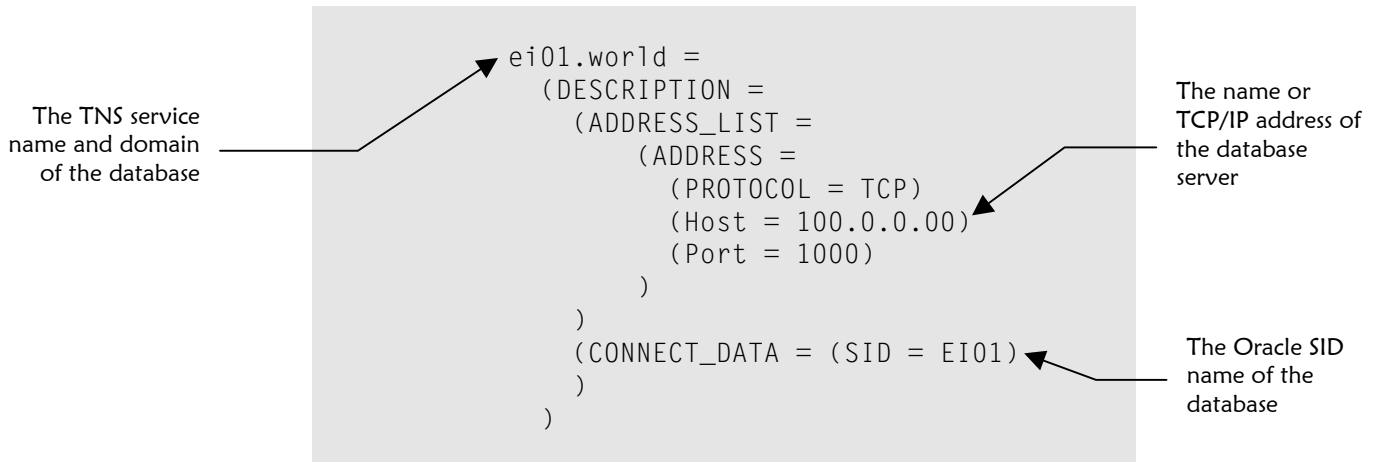
Note: If you have both Oracle Server and Oracle Client installed, you may have two **tnsnames.ora** files. In this case, you need to create identical database stanzas in both files for the new database.

▶ To modify **tnsnames.ora**

Before you begin:

- ✓ Complete "Step 12: Copy the Database Files to the Client Workstation"
- 1 On the machine from which you will run **create2.bat**, navigate to the Oracle home directory and then to **\network\admin**.
- 2 Make a backup of the file **tnsnames.ora**, and then open the file **tnsnames.ora** in any text editor.
- 3 Create a new stanza for the database, including the following information:
 - The TNS service name of the database
 - The connection protocol used to connect to the database
 - The database host name or address
 - The port number
 - The Oracle SID name for your database

Following is a sample stanza from **tnsnames.ora**. Your **tnsnames.ora** file may differ from this sample depending on how your Oracle networking is configured.



Note: For complete instructions on how to configure Oracle networking for your environment, refer to the appropriate Oracle user documentation.

4 Continue to "Step 14: Modify **create2.bat**."

Step 14: Modify **create2.bat**

The file **create2.bat** is a batch file that creates the database tables, triggers, indexes, and so on. You need to modify certain variables in this file that tell the script how to locate the database instance and installation scripts.

► To modify **create2.bat**

Before you begin:

- ✓ Complete "Step 13: Modify **tnsnames.ora**"

- 1 On the machine from which you will run **create2.bat**, navigate to the path where the database files are located, and then navigate to the **server\dbcommon\client** directory.
- 2 Make a backup copy of the file **create2.bat**.
- 3 Right-click the **create2.bat** file and then select **Edit** from the list that appears. Do not double-click this file to open it.
- 4 Make the following modifications:
 - Enter the Oracle TNS service name of the database in the variable **TNS_NAME** (the TNS service name is defined in **tnsnames.ora**).
 - In the variable **ORACLE_SID**, enter the SID name of the database.

- In the variable **INSTALLDRIVE**, enter the drive on which the database installation files are located.
- In the variable **INSTALL_HOME**, enter the path in which the database files are located. Do not include the drive designation in this path. This is the path to the **server** directory (do not include **/server/dbcommon/server** in the pathname).

A sample of the above variables is illustrated below.

```
SET TNS_NAME=EI01
SET ORACLE_SID=EI01
SET INSTALLDRIVE=C:
SET INSTALL_HOME=/TEMP/INSTALL
```

5 Save the changes to **create2.bat** and close the file.

6 Do one of the following:

*If you want to install region-specific security capabilities, continue to "Step 15: Modify **install_ssap.bat**."*

*If you are not installing region-specific security capabilities, skip to "Step 16: Run **create2.bat**."*

Step 15: Modify **install_ssap.bat** (optional)

Running **install_ssap.bat** installs the views you need in order to use the region-specific security capabilities of e*Index. You do not need to modify or run this file if you do not want to use this capability.



For more information about region-specific security, see "What is Region-Specific Security?" in Chapter 3 of the *e*Index Security User's Guide* and "About Region-Specific Security" in Chapter 3 of the *e*Index Administrator User's Guide*.

► To modify **install_ssap.bat**

Before you begin:

- ✓ Complete "Step 14: Modify **create2.bat**"

- 1** On the machine from which you will run **install_ssap.bat**, navigate to the path where the database files are located, and then navigate to the **server\dbcommon\client** directory.
- 2** Make a backup copy of the file **install_ssap.bat**.
- 3** Right-click the **install_ssap.bat** file and then select **Edit** from the list that appears. Do not double click this file to open it.

- 4 Enter the Oracle TNS service name of the database in the variable **TNS_NAME** (the TNS service name is defined in **tnsnames.ora**). An example of the **TNS_NAME** variable is illustrated below.

```
SET TNS_NAME=EI01
```

- 5 Save the changes to **install_ssap.bat** and close the file.
- 6 Continue to "Step 16: Run **create2.bat**."

Step 16: Run create2.bat

After you have made the necessary modifications to the installation files, you can run **create2.bat** to create the tables, views, indexes, and so on for your e*Index database.

***Important!** If this process does not run successfully, do NOT run **create2.bat** a second time. Instead, verify that the variables you set for each file in the previous steps are correct, and then re-run **create1(.bat)** followed by **create2.bat**. If the process is still not successful, contact your SeeBeyond representative.*

► To run create2.bat

Before you begin:

- ✓ Complete "Step 14: Modify **create2.bat**" and optionally "Step 15: Modify **install_ssap.bat**"
- 1 On the machine from which you will run **create2.bat**, navigate to the path where the database files are located, and then navigate to the **server\dbcommon\client** directory.
 - 2 Double-click **create2.bat** to run the batch file.
 - 3 You can view installation log files in the path installation path in **server\Uinitial\Spool**. Review each log file to ensure that there were no errors during the running of the script.
 - 4 When prompted, press any key on the keyboard to complete the installation.
 - 5 If you are not installing region-specific security, your installation is complete. If you want to install region-specific security, continue to "Step 17: Run **install_ssap.bat**."

Step 17: Run `install_ssap.bat` (optional)

After you have run `create2.bat` to create the e*Index database, you can install system-specific security by running `install_ssap.bat`.

***Important!** Do not execute this file if you do not want to use region-specific security. Creating these views requires that you also define the regions associated with each system and assign them to user profiles before e*Index information can be accessed. If you install region-specific security but do not want to use the functionality, you can remove it by running `remove_ssap.bat`. Modify this file in the same way you modified `install_ssap.bat` in "Step 14: Modify `install_ssap.bat`" earlier in this chapter.*

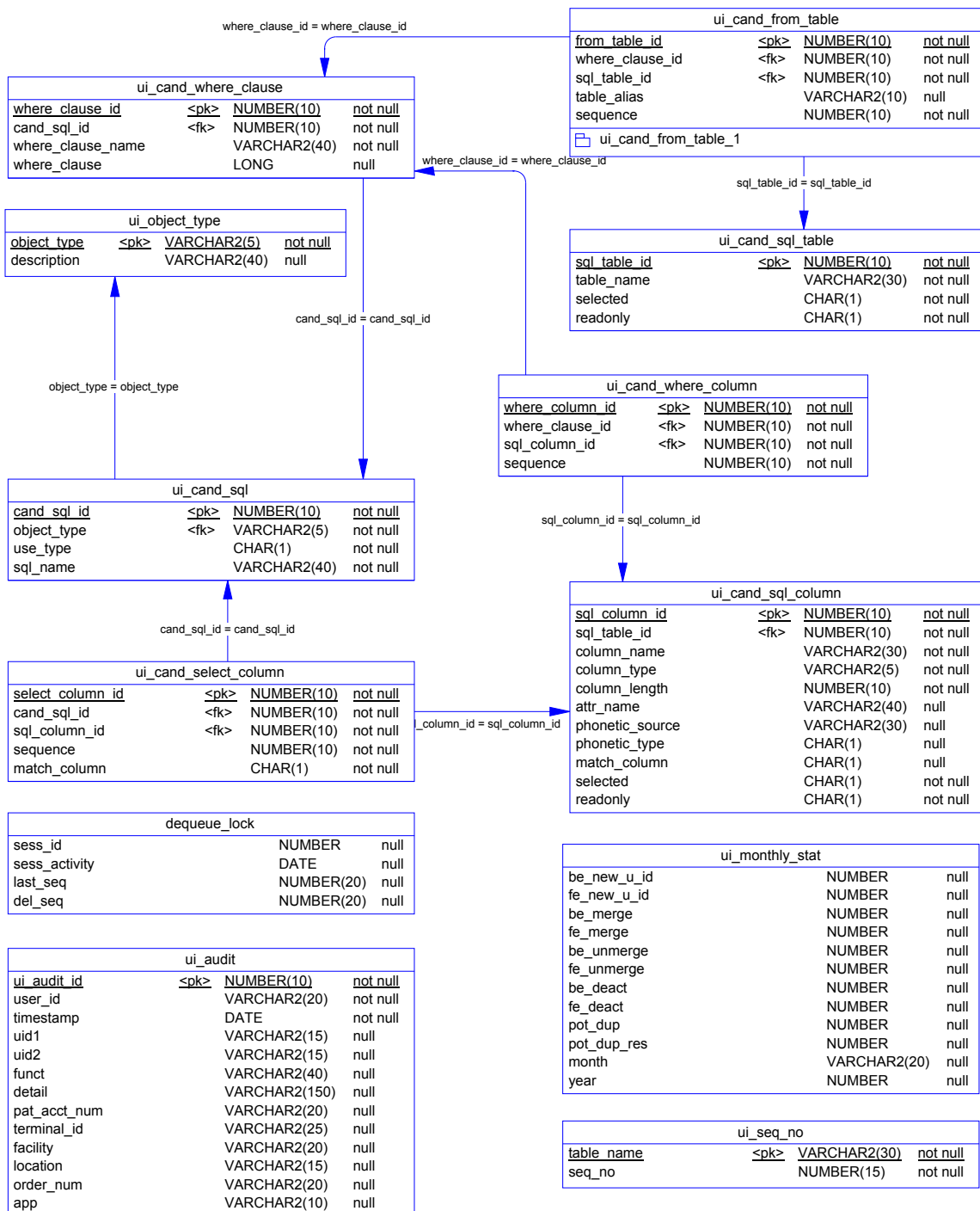
► To run `install_ssap.bat`

Before you begin:

- ✓ Complete "Step 16: Run `create2.bat`"
 - ✓ Make sure you completed "Step 15: Modify `install_ssap.bat`"
- 1** On the machine from which you will run `install_ssap.bat`, navigate to the path where the database files are located, and then navigate to the `server\dbcommon\client` directory.
 - 2** Double-click `install_ssap.bat` to run the batch file.
 - 3** When prompted, press any key on the keyboard to close the MS-DOS window.
-

e*Index 4.5.2 Oracle Database Model

The diagrams on the following pages illustrate the table structure for e*Index version 4.5.2 for Oracle. Your actual database may vary slightly from this model depending upon the release you have installed. The *ui_person* and *ui_transaction* tables are displayed on two different pages to better illustrate the connections to these two tables.



ui_config			
<u>interface</u>	<pk>	VARCHAR2(255)	not null
<u>code</u>	<pk>	VARCHAR2(255)	not null
value		NUMBER	not null
📁 pk_idx_ui_config			

ui_control			
<u>ctrl_key</u>	<pk>	VARCHAR2(10)	not null
description		VARCHAR2(50)	null
ctrl_value		VARCHAR2(30)	null
create_date		DATE	null
📁 pk_idx_control			

ui_dept			
<u>dept_code</u>	<pk>	VARCHAR2(5)	not null
description		VARCHAR2(20)	null
date_time		DATE	null
📁 pk_idx_dept			

ui_canned_msg			
<u>code</u>	<pk>	VARCHAR2(5)	not null
description		VARCHAR2(80)	not null
create_date		DATE	null
📁 pk_idx_canned			

ui_message			
<u>code</u>	<pk>	VARCHAR2(5)	not null
description		LONG	not null
message_box_header		VARCHAR2(50)	not null
icon		VARCHAR2(15)	null
button		VARCHAR2(20)	null
default_button		NUMBER(1)	null
message_type		VARCHAR2(8)	null
application		VARCHAR2(10)	null
date_time		DATE	null
📁 pk_idx_ui_message			

ui_zip			
<u>zip_code</u>	<pk>	VARCHAR2(8)	not null
zip4		VARCHAR2(4)	null
<u>city</u>	<pk>	VARCHAR2(30)	not null
<u>state</u>	<pk>	VARCHAR2(10)	not null
county		VARCHAR2(3)	null
residence_code		VARCHAR2(4)	null
create_date		DATE	null
📁 pk_idx_zip			

ui_comment			
<u>ui_comment_id</u>	<pk>	NUMBER(10)	not null
u_id		VARCHAR2(15)	not null
type		VARCHAR2(8)	not null
timestamp		DATE	not null
comment_text		LONG	null
ui_org		VARCHAR2(15)	null
📁 ui_id_comment			

ui_msg_header			
<u>ui_msg_header_id</u>	<pk>	NUMBER(20)	not null
queue_id		CHAR(1)	not null
errors		NUMBER(10)	not null
create_date		DATE	not null
create_userid		VARCHAR2(20)	not null
📁 ui_msg_header_1			

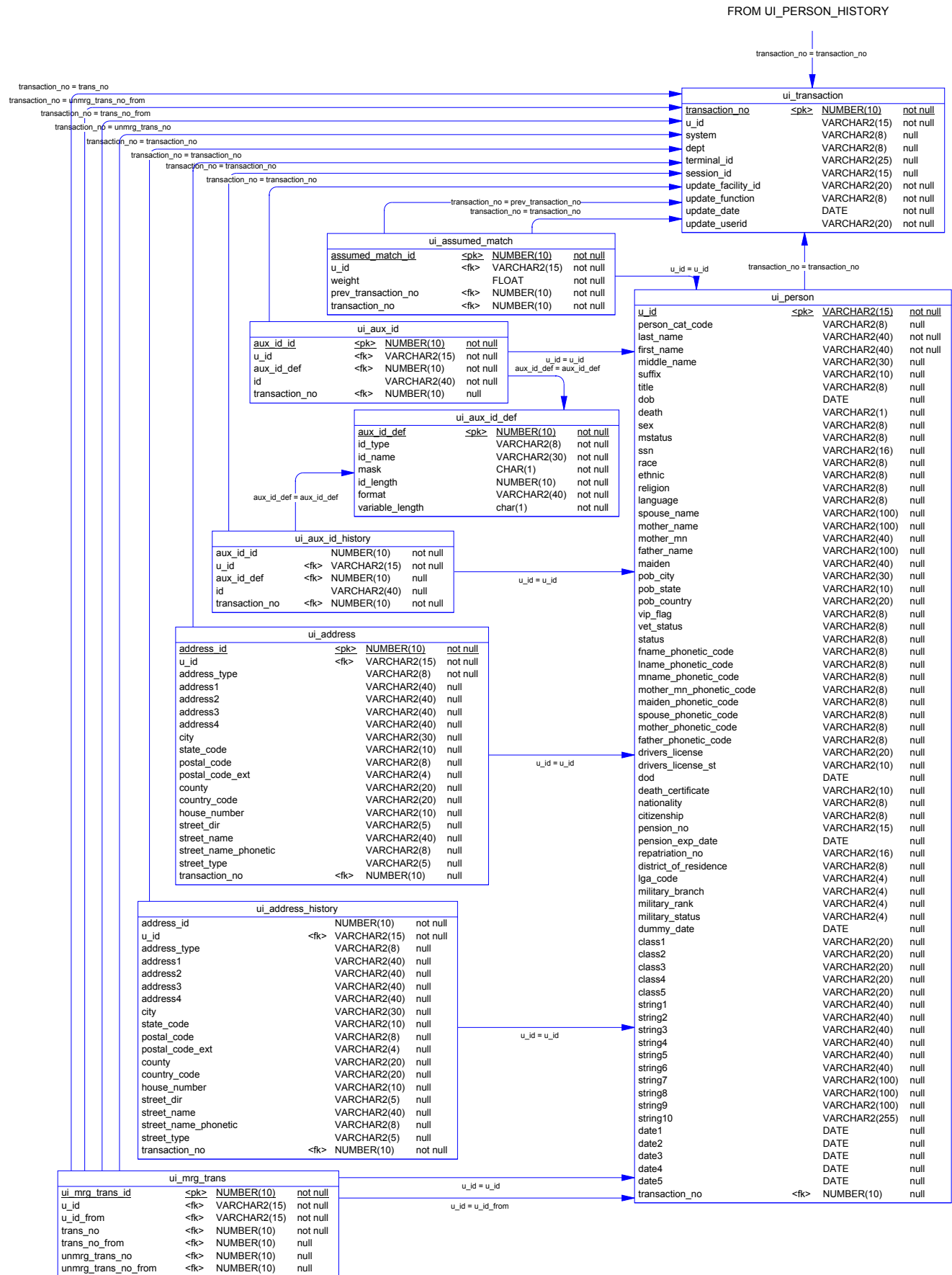
ui_msg_header_id = ui_msg_header_id

ui_msg_detail			
<u>ui_msg_detail_id</u>	<pk>	NUMBER(20)	not null
ui_msg_header_id	<fk>	NUMBER(20)	null
msg		VARCHAR2(512)	not null
📁 fk_ui_msg_detail			

ui_person_history			
<u>ui_person_history_id</u>	<pk>	NUMBER(10)	not null
u_id		VARCHAR2(15)	not null
person_cat_code		VARCHAR2(8)	null
last_name		VARCHAR2(40)	null
first_name		VARCHAR2(40)	null
middle_name		VARCHAR2(30)	null
suffix		VARCHAR2(10)	null
title		VARCHAR2(8)	null
dob		DATE	null
death		VARCHAR2(1)	null
sex		VARCHAR2(8)	null
mstatus		VARCHAR2(8)	null
ssn		VARCHAR2(16)	null
race		VARCHAR2(8)	null
ethnic		VARCHAR2(8)	null
religion		VARCHAR2(8)	null
language		VARCHAR2(8)	null
spouse_name		VARCHAR2(100)	null
mother_name		VARCHAR2(100)	null
mother_mn		VARCHAR2(40)	null
father_name		VARCHAR2(100)	null
maiden		VARCHAR2(40)	null
pob_city		VARCHAR2(30)	null
pob_state		VARCHAR2(10)	null
pob_country		VARCHAR2(20)	null
vip_flag		VARCHAR2(8)	null
vet_status		VARCHAR2(8)	null
status		VARCHAR2(8)	null
fname_phonetic_code		VARCHAR2(8)	null
lname_phonetic_code		VARCHAR2(8)	null
mname_phonetic_code		VARCHAR2(8)	null
mother_mn_phonetic_code		VARCHAR2(8)	null
maiden_phonetic_code		VARCHAR2(8)	null
spouse_phonetic_code		VARCHAR2(8)	null
mother_phonetic_code		VARCHAR2(8)	null
father_phonetic_code		VARCHAR2(8)	null
drivers_license		VARCHAR2(20)	null
drivers_license_st		VARCHAR2(10)	null
dod		DATE	null
death_certificate		VARCHAR2(10)	null
nationality		VARCHAR2(8)	null
citizenship		VARCHAR2(8)	null
pension_no		VARCHAR2(15)	null
pension_exp_date		DATE	null
repatriation_no		VARCHAR2(16)	null
district_of_residence		VARCHAR2(8)	null
lga_code		VARCHAR2(4)	null
military_branch		VARCHAR2(4)	null
military_rank		VARCHAR2(4)	null
military_status		VARCHAR2(4)	null
dummy_date		DATE	null
class1		VARCHAR2(20)	null
class2		VARCHAR2(20)	null
class3		VARCHAR2(20)	null
class4		VARCHAR2(20)	null
class5		VARCHAR2(20)	null
string1		VARCHAR2(40)	null
string2		VARCHAR2(40)	null
string3		VARCHAR2(40)	null
string4		VARCHAR2(40)	null
string5		VARCHAR2(40)	null
string6		VARCHAR2(40)	null
string7		VARCHAR2(100)	null
string8		VARCHAR2(100)	null
string9		VARCHAR2(100)	null
string10		VARCHAR2(255)	null
date1		DATE	null
date2		DATE	null
date3		DATE	null
date4		DATE	null
date5		DATE	null
transaction_no	<fk>	NUMBER(10)	not null

transaction_no = transaction_no

TO UI_TRANSACTION



ui_ctrl_rule			
<u>ui_ctrl_rule_id</u>	<pk>	NUMBER(10)	not null
rule_name		VARCHAR2(16)	not null
root_file		VARCHAR2(16)	not null
read_only		CHAR(1)	not null
in_use		CHAR(1)	not null
create_date		DATE	not null
create_userid		VARCHAR2(20)	not null
update_date		DATE	null
update_userid		VARCHAR2(20)	null

ui_nickname			
<u>ui_nickname_id</u>	<pk>	NUMBER(10)	not null
formal_name		VARCHAR2(40)	not null
nick_name		VARCHAR2(40)	not null
create_date		DATE	not null
create_userid		VARCHAR2(20)	not null
update_date		DATE	null
update_userid		VARCHAR2(20)	null

ui_ctrl_file			
<u>ui_ctrl_file_id</u>	<pk>	NUMBER(10)	not null
ui_ctrl_rule_id	<fk>	NUMBER(10)	not null
file_type		VARCHAR2(3)	not null
file_name		VARCHAR2(18)	not null
file_ext		VARCHAR2(3)	not null
file_content		LONG	null
content_date		DATE	not null
last_synch_date		DATE	null
create_date		DATE	not null
create_userid		VARCHAR2(20)	not null
update_date		DATE	null
update_userid		VARCHAR2(20)	null

ui_ctrl_file_hist			
<u>ui_ctrl_file_hist_id</u>		NUMBER(10)	not null
ui_ctrl_file_id	<fk>	NUMBER(10)	not null
file_type		VARCHAR2(3)	not null
file_name		VARCHAR2(18)	not null
file_ext		VARCHAR2(3)	not null
file_content		LONG	null
content_date		DATE	not null
save_date		DATE	not null
create_date		DATE	not null
create_userid		VARCHAR2(20)	not null
update_date		DATE	null
update_userid		VARCHAR2(20)	null

ui_ctrl_table			
<u>ui_ctrl_table_id</u>	<pk>	NUMBER(10)	not null
table_name		VARCHAR2(30)	not null
description		VARCHAR2(48)	null
read_only		CHAR(1)	not null
create_date		DATE	not null
create_userid		VARCHAR2(20)	not null
update_date		DATE	null
update_userid		VARCHAR2(20)	null

ui_ctrl_field			
<u>ui_ctrl_field_id</u>	<pk>	NUMBER(10)	not null
field_name		VARCHAR2(2)	not null
field_type		VARCHAR2(2)	not null
field_length		NUMBER(10)	not null
field_missing		VARCHAR2(2)	not null
description		VARCHAR2(48)	not null
ui_ctrl_column_id		NUMBER(10)	null
create_date		DATE	not null
create_userid		VARCHAR2(20)	not null
update_date		DATE	null
update_userid		VARCHAR2(20)	null

ui_ctrl_column			
<u>ui_ctrl_column_id</u>	<pk>	NUMBER(10)	not null
ui_ctrl_table_id	<fk>	NUMBER(10)	not null
column_name		VARCHAR2(30)	not null
description		VARCHAR2(48)	null
read_only		CHAR(1)	not null
create_date		DATE	not null
create_userid		VARCHAR2(20)	not null
update_date		DATE	null
update_userid		VARCHAR2(20)	null

ui_table			
<u>ui_table_id</u>	<pk>	NUMBER(10)	not null
ui_table_name		VARCHAR2(30)	not null

ui_misc_opt_control			
<u>control_type</u>	<pk>	varchar2(8)	not null
description		varchar2(40)	not null

ui_table_column			
<u>table_column_id</u>	<pk>	NUMBER(10)	not null
ui_table_id	<fk>	NUMBER(10)	not null
column_name		VARCHAR2(30)	not null
default_label		VARCHAR2(40)	not null
label		VARCHAR2(40)	not null
visible		CHAR(1)	not null
required		CHAR(1)	not null
read_only		CHAR(1)	not null

ui_misc_option			
<u>misc_option_id</u>	<pk>	number(10)	not null
country_code	<fk>	varchar2(8)	not null
control_type	<fk>	varchar2(8)	not null
option_name		varchar2(40)	not null
value		varchar2(40)	not null

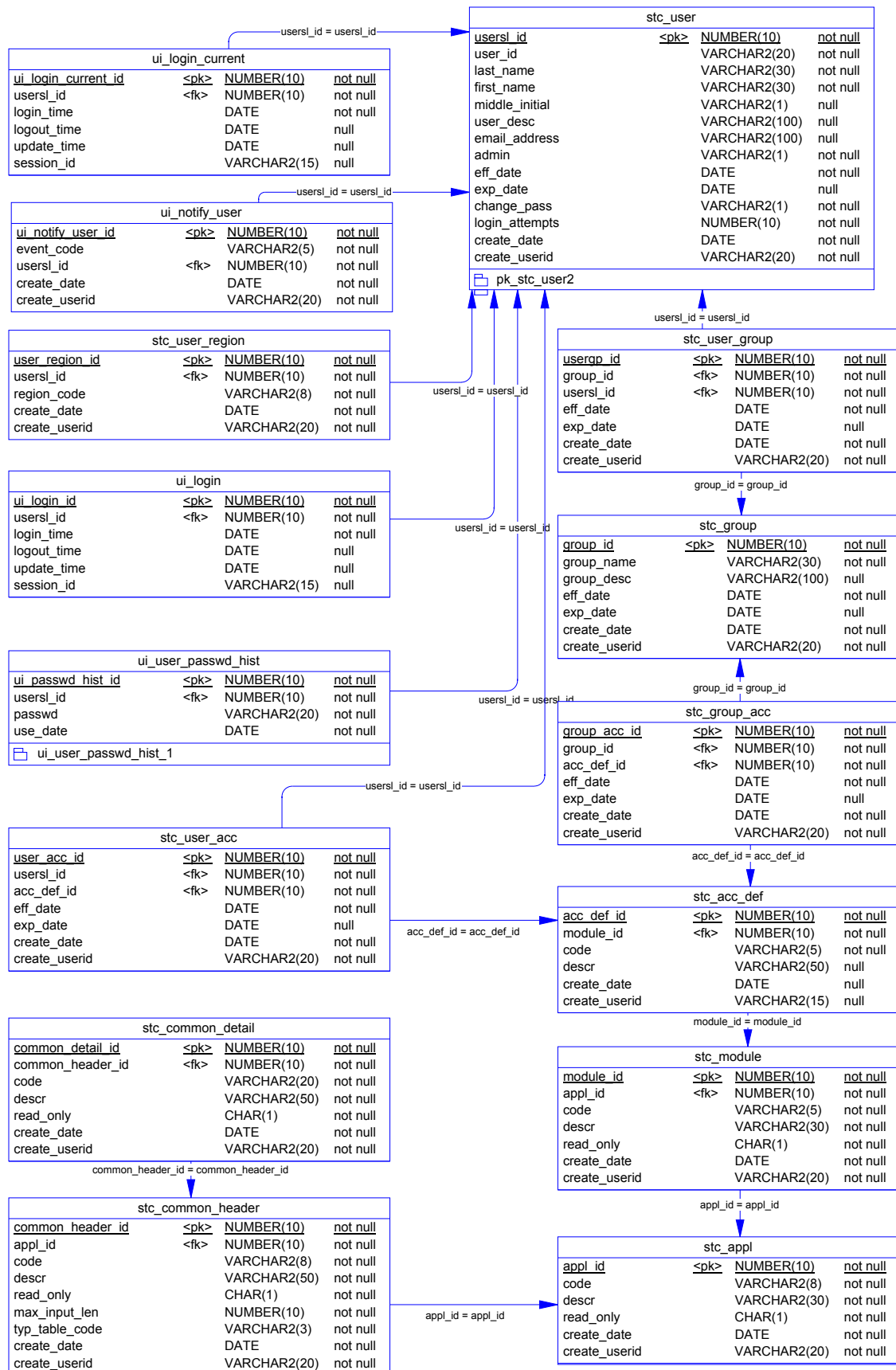
control_sec			
<u>ctrl_key</u>	<pk>	VARCHAR2(10)	not null
description		VARCHAR2(50)	null
ctrl_value		VARCHAR2(10)	null
create_date		DATE	null

ui_misc_opt_country			
<u>country_code</u>	<pk>	varchar2(8)	not null
country_name		varchar2(40)	null

ui_no_passwd			
<u>no_passwd</u>	<pk>	VARCHAR2(20)	not null
pk_idx_ui_no_passwd			

ui_person_x_name			
<u>u_id</u>	<pk>	varchar2(15)	not null
x_last_name		varchar2(40)	not null
x_first_name		varchar2(40)	not null
x_mother_mn		varchar2(40)	null
x_maiden		varchar2(40)	null
x_middle_name		varchar2(30)	null

ui_alias_x_name			
<u>ui_alias_id</u>	<pk>	number(10)	not null
u_id		varchar2(15)	not null
x_last_name		varchar2(40)	not null
x_first_name		varchar2(40)	not null
x_middle_name		varchar2(30)	null



Installing a Sybase Database

About this Chapter

Overview

This chapter presents the background information and the step-by-step instructions you need to install an e*Index 4.5.2 database for Sybase. The following diagram illustrates the major topics in this chapter. For the page numbers on which specific topics appear, see the next page of this chapter.

About the Installation	Learn about installing and modifying the database files
Create the Database	Learn how to install the database files, and to modify and run the database scripts
Physical Data Model	View a physical data model of the e*Index database

What's Inside

This chapter provides background information and instructions related to the topics listed below.

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Learning About the Database Installation

Overview

This section of the chapter provides background information about the files you install, modify, and execute to create an e*Index 4.5.2 Sybase database.

What do I Need to Know Before I Start?

Before beginning, you should determine the path in which you want the database to reside, the name you want to assign the database, and the administrator password for the database. You should also gather information about the database size requirements because you will need to specify sizes before running the installation scripts. It is helpful to be familiar with your Sybase environment, Sybase networking, and Sybase database administration. e*Index 4.5.2 is compatible with Sybase 12.0.

What are the Database Scripts?

Installing the database files creates several SQL scripts that you use to create and test the new database. Two batch files, **create1.bat** (or **create1** in UNIX) and **create2.bat**, call the SQL scripts and install the database. You run **create1.bat** from the database server to create a database instance for your e*Index database. **create2.bat** is run from a client workstation, and creates the actual e*Index database tables, views, indexes, and so on. You can run an optional script, **install_ssap.bat**, from a client workstation to install region-specific security capabilities (for more information about region-specific security, see Chapter 3 of the *e*Index Security User's Guide*). If your database server runs on Windows NT, you can run **create1.bat** and **install_ssap.bat** from the database server instead.

Do I Need to Modify Any Files?

Installing a new e*Index 4.5.2 database requires a few modifications to the database scripts and related files in order to install the database in the correct location. You need to specify a name for the database. Make sure the name you select is not already used by any existing databases on the database server. The files you need to modify include **defs.sql**, **sql.ini**, **create1.bat** (or **create1** for UNIX), **create2.bat**, and optionally **install_ssap.bat**. Each modification is described in the appropriate procedure later in this chapter. We recommend that a Sybase database administrator make these changes.

Creating the Database

Overview

To install an e*Index 4.5.2 database for Sybase, you must complete the following steps:

- Step 1: Obtain Database Information
- Step 2: Install Sybase
- Step 3: Install the Database and Report Files
- Step 4: Copy the Files to the Database Server
- Step 5: Create the Database Path
- Step 6: Modify **defs.sql**
- Step 7: Modify **create1(.bat)**
- Step 8: Run **create1(.bat)**
- Step 9: Copy the Database Files to the Client Workstation
- Step 10: Modify **sql.ini**
- Step 11: Modify **create2.bat**
- Step 12: Modify **install_ssap.bat** (optional)
- Step 13: Run **create2.bat**
- Step 14: Run **install_ssap.bat** (optional)

*Note: If you chose to install all components of e*Index when you installed the e*Index schema files, you should have already completed steps 1 through 3. You can begin with "Step 4: Copy the Files to the Database Server."*

Step 1: Obtain Database Information

Before beginning, you should know the server name and path in which you want to install the e*Index database, and the name you want to assign the new database. You should also obtain information about your database size requirements because you will need to specify file sizes before running the installation scripts. The file **defs.sql** lists the files and devices you need to size. This file is described later in this chapter. Finally, determine whether you need to install region-specific security (described in Chapter 3 of the *e*Index Security User's Guide* and the *e*Index Administrator User's Guide*).

Because of the complex nature of creating a database, we recommend that a database administrator create your database.

Step 2: Install Sybase

In order to perform the server side installation, you must install Sybase 12.0 Server on the database server. When you install Sybase, be sure to create and configure an Adaptive Server for the e*Index database, including the server name and connectivity information. You must define network connections for the Default XP Server. If you are installing the database in a Unix environment, you will need to execute one file, **create2.bat**, from a client workstation. You must install Sybase 12.0 Client on the machine from which you will run **create2.bat**.

For information about installing Sybase, refer to the appropriate installation documentation for Sybase.

***Important!** It is crucial that the Sybase Server installation is operational prior to performing the following steps.*

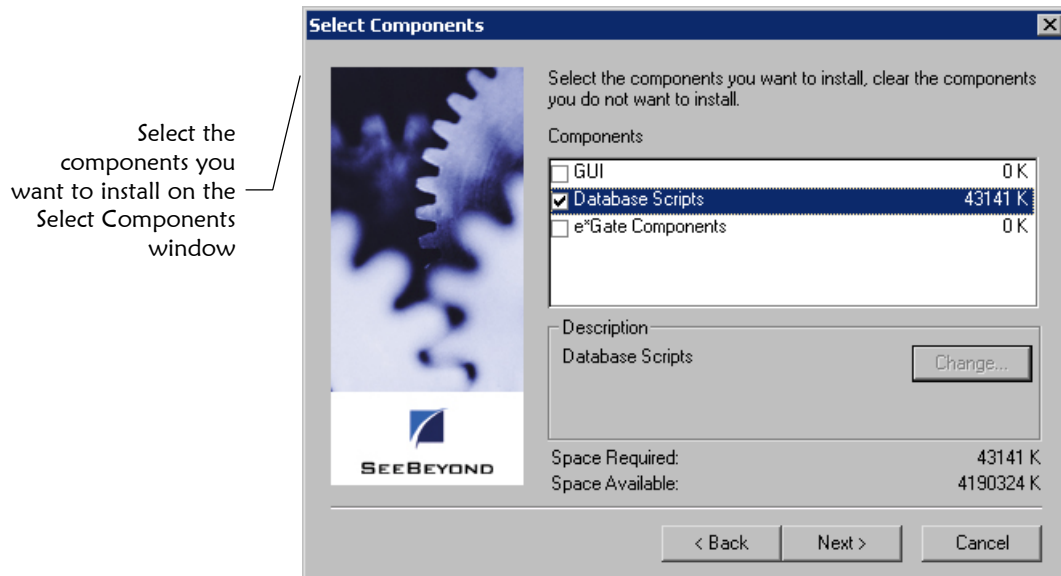
Step 3: Install the Database and Report Files

Installing the database and report files is very similar to the process you followed to install the e*Index schema files.

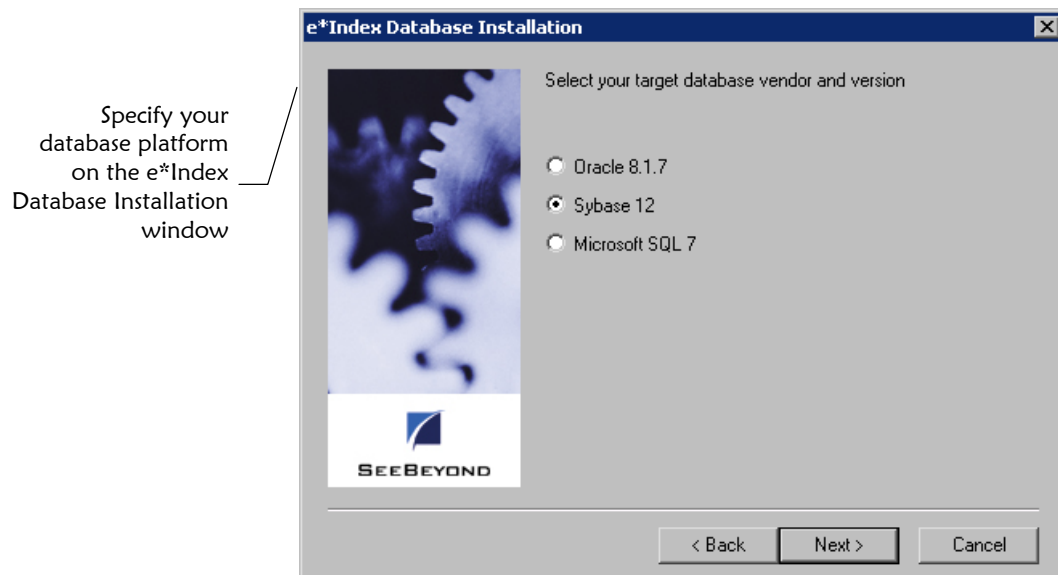
► To install the database and report files

Before you begin:

- ✓ Complete "Step 2: Install Sybase"
 - ✓ Make sure the e*Index installation CD-ROM is inserted into the CD-ROM drive of your database server
- 1 Follow steps 1 through 7 under "Step 6: Install the e*Index Schema Files" in Chapter 2, "Installing the e*Gate Schema Files." The Select Components window should now be visible.
 - 2 On the Select Components window, select the check box next to **Database Scripts**.

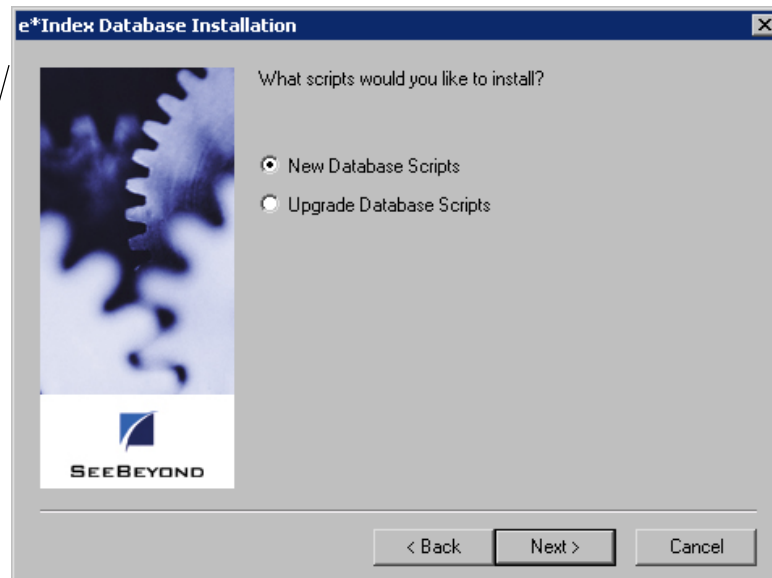


- 3 Click **Next**. The e*Index Database Installation window appears.



- 4 Select **Sybase 12**, and then click **Next**. A second e*Index Database Installation window appears.

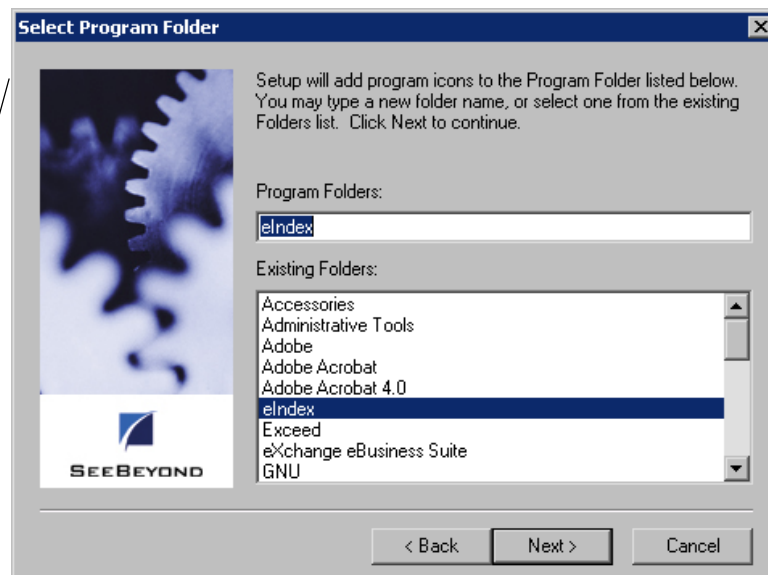
Specify whether to install the scripts to install a new database or the scripts to upgrade an existing database



Next button

- 5 Select **New Database Scripts**, and then click **Next**. The Select Program Folder window appears.

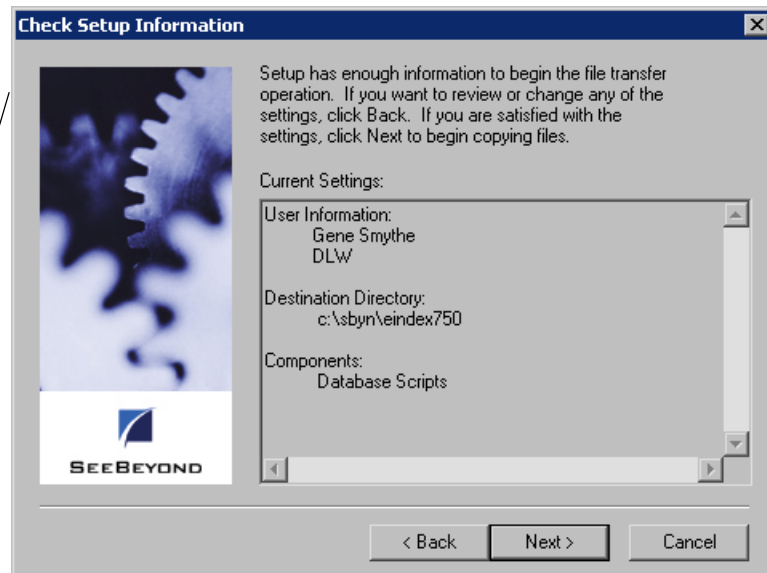
Specify the folder in which to install the program icons on the Select Program Folder window



Next button

- 6 Enter the name of the folder into which you want to install the program icons or accept the default name, and then click **Next**. The Check Setup Information window appears.

On the Check Setup Information window, verify the information you specified



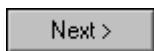
7 Verify the information you specified, and do one of the following:

*To change any of the options you selected, click **Back**, and make the necessary changes.*

*To continue with the installation, click **Next**. When all files are installed, the Setup Complete window appears.*

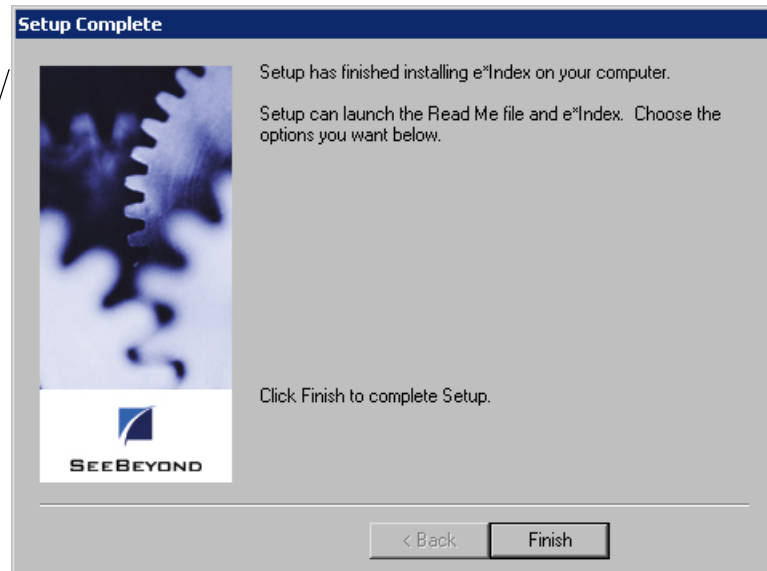


Back button



Next button

The Setup Complete window indicates that the database files have been installed



Finish button

8 Click **Finish** to complete the setup process.

- 9 To view the database files that were installed:
 - Open Windows Explorer and navigate to the path you specified for the installation files.
 - Open the `\server\dbcommon` subdirectory. You will find two subdirectories, `server` and `client`, and one file, `defs.sql`. The Client directory contains the database scripts, `create2.bat`, `install_ssap.bat`, and `remove_ssap.bat`. The `server` directory contains the files you need to create the database instance on your server.

- 10 Do one of the following:

If you installed the database files on a machine other than the database server, continue to "Step 4: Copy the Files to the Database Server."

If you installed the database files on the database server, continue to "Step 5: Create the Database Path."

Step 4: Copy the Files to the Database Server

If you did not install the database files on the database server (as would be the case if you installed all e*Index files at once on a client machine), you should copy the files to the database server in order to create the database instance.

► To copy the files to the database server

Before you begin:

- ✓ Complete "Step 3: Install the Database and Report Files"
- ✓ Create the path into which you want to copy the database files. This can be any path on the database server.

- 1 Copy the entire folder named `server` that was created in the installation path from step 3 above to the path you created on the database server. This folder includes the subdirectories `dbcommon`, `dbtools`, and `UIinitial`.

Important! *If you copy the files into a Unix environment, make sure that you have read, write, and execute privileges for all of the files in the server directory for both your Unix account and your Sybase account. Also, make sure you define the **Sybase** home directory in your path.*

- 2 Once you have moved the files to the database server, continue to "Step 5: Create the Database Path."

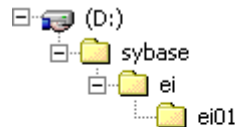
Step 5: Create the Database Path

If you did not install the database and report files in the path in which you want the database to reside, you need to create the folders for the database path.

▶ To create the database path

Before you begin:

- ✓ Complete "Step 4: Copy the Files to the Database Server"
 - ✓ Determine the path in which you want to create your database on the database server
- 1 On the database server, create the path to the database home directory. This is the path you will specify in the file **defs.sql** in "Step 6: Modify **defs.sql**." SeeBeyond recommends using the name of the database as the name of the last folder in the database home directory. The path shown below illustrates the path you would create for the variables defined in the **defs.sql** example in the following step.



- 2 Continue to "Step 6: Modify **defs.sql**".

Step 6: Modify defs.sql

The file **defs.sql** defines certain variables that are used by the setup scripts to determine the location and sizing parameters of the e*Index database. This file defines the devices for a Sybase database.

Notes:

- View your **defs.sql** file for a complete list of device variables that you can modify, along with the default values.
 - Please refer to the appropriate Sybase user documentation to help determine the most efficient method of sizing and distributing the database.
 - A Sybase database administrator should perform this step.
-

► To modify the defs.sql file

Before you begin:

- ✓ Complete "Step 5: Create the Database Path" or verify that the path to your database home directory exists
- 1 On the database server, navigate to the path you specified when you installed your database files, or, if you copied the files to the database server, navigate to the path in which you copied the database files. Open the subdirectory `\server\dbcommon`.
- 2 In the `dbcommon` directory, make a backup copy of the `defs.sql` file and then open the `defs.sql` file in any text editor.
- 3 In the variable `select @DATABASE`, enter the name of the database, leaving the double quotes around the name. Remember that Sybase is case-sensitive.
- 4 In the variable `select @DBPATH`, enter the path you created in "Step 5: Create the Database Path", leaving the double quotes around the pathname.
- 5 If you already have an e*Index database installed on the database server, you may need to enter a new password for `select @UIPASSWD`, because Sybase requires different login passwords for each database and each user ID.

The excerpt from `defs.sql` below illustrates sample definitions for the variables you need to modify. These variables reflect the sample path displayed earlier in "Step 5: Create the Database Path."

```
select @DATABASE = "ei01"
select @DBPATH = "D:\sybase\ei\ei01"
...
select @UIPASSWD = "sybase"
```

Notes:

- *The path you enter in `@DBPATH` is the database home directory.*
 - *Make sure you leave the double quotes around the pathname and, for Windows NT only, enter the database drive at the beginning of the database path (as shown above).*
-
- 6 Modify the device and file sizes for your database as required for your specific installation. The sample values in this file represent the minimum values recommended by Sybase. A database administrator who is familiar with your processing requirements should perform this step, since they can best determine the sizing needs of your database. Refer to your Sybase documentation for more information. The following excerpt illustrates the variables that control database sizing.

```
select @DBDEVSIZE = 51200
select @LOGDEVSIZE =25600
--
select @DBSIZE=80
select @LOGSIZE=40
```

Note: Do not modify the device names in this file. The naming convention used here is the same as that used in the installation files.

- 7 Save and close the file, and continue to "Step 7: Modify **create1(.bat)**."

Step 7: Modify **create1(.bat)**

The file **create1.bat** (or **create1** for UNIX) is a batch file that you run to create your database instance. You need to modify certain variables in this file that tell the script where to create the database. These modifications are different for a database on UNIX than for a database on Windows NT.

► To modify **create1.bat** for a Windows NT database installation

Before you begin:

- ✓ Complete "Step 7: Modify **defs.sql**"
- 1 On the database server, navigate to the path you specified when you installed your database files, or, if you copied the files to the database server, navigate to the path in which you copied the database files. Open the subdirectory **\server\dbcommon\server**.
 - 2 Make a backup copy of the **create1.bat** file.
 - 3 Right-click on the **create1.bat** file, and then select **Edit** from the drop-down list that appears. Do not double-click this file to open it.
 - 4 Make the following modifications:
 - In the variable **SERVER**, enter the name of the Sybase Adaptive Server for this database. You should have created the Adaptive Server when you installed Sybase.
 - In the variable **DATABASE**, enter the name of the database. This should be the same name you entered for the **select @DATABASE** variable in the **defs.sql** file.
 - In the variable **set SA_PASSWD**, enter the password for the system administrator user for Sybase.

An example of the above variables would appear similar to this:

```
set SERVER=SYBASE1
set DATABASE=ei01

...
set SA_PASSWD=sybase
```

- 5 Save and close the file. Continue to "Step 8: Run **create1.bat**."

► To modify **create1** for a UNIX database installation

Before you begin:

- ✓ Complete "Step 7: Modify **defs.sql**"
 - ✓ For Unix, you may need to change some folder names where the database installation files are located. Make sure that the **dbcommon** and **server** folder names do not include any capital letters.
- 1 On the database server, navigate to the path you specified when you installed your database files, or, if you copied the files to the database server, navigate to the path in which you copied the database files. Open the subdirectory **/server/dbcommon/server**.
 - 2 Make a backup copy of **create1** and then open the file in any text editor.
 - 3 Make the following modifications:
 - In the variable **SERVER**, enter the name of the Sybase Adaptive Server for this database. You should have created the Adaptive Server when you installed Sybase.
 - In the variable **DBPATH**, enter the path you created in "Step 5: Create the Database Path". This should be the same name you entered for the **select @DBPATH** variable in the **defs.sql** file. Remember that pathnames are case-sensitive in Unix.
 - In the variable **DATABASE**, enter the name of the database. This should be the same name you entered for the **select @DATABASE** variable in the **defs.sql** file.
 - In the variable **SA_PASSWD**, enter the password for the system administrator user for Sybase.

An example of the above variables would appear similar to this:

```
SERVER=SYBASE1
...
DBPATH=/sybase/ei/ei01
DATABASE=ei01
...
SA_PASSWD=sybase
```

- 4 Save and close the file. Continue to "Step 8: Run **create1(.bat)**."

Step 8: Run **create1(.bat)**

You are now ready to run the script to install your database instance. This may take several minutes depending upon the size of your installation. You must run this script from the server where the database resides.

▶ To run **create1.bat** for a Windows NT database

Before you begin:

- ✓ Complete "Step 7: Modify **create1(.bat)**"

- 1 On your database server, navigate to the path into which you installed or moved the database files, and then navigate to the **\server\dbcommon\server** directory.
- 2 Double-click the **create1.bat** file. The database script begins to execute. This may take several minutes.

Note: You can also run this file from an MS-DOS command prompt, which gives you more control over the display of the batch file process.

- 3 Check the log file, **create1.log**, in **\server\dbcommon\server** to verify the process was successful.
- 4 Continue to "Step 9: Copy the Database Files to the Client Workstation."

▶ To run **create1** for a UNIX database

Before you begin:

- ✓ Complete "Step 7: Modify **create1(.bat)**"
- ✓ Make sure you are logged on as the Sybase Administrator user, and that the Sybase Administrator user has read, write, and execute permissions for all files and folders in the **/server/dbcommon** path.
- ✓ Make sure that you define the path to the Sybase home directory in your path.

- 1 On your database server, navigate to the path into which you installed or moved the database files, and then navigate to the **/server/dbcommon/server** directory.
- 2 Type **create1**. The database script begins to execute. This will take several minutes.

Note: If the path in which **create1** is located has not been defined in your path, then you need to type **.!create1** to run the file.

- 3 Check the log file, **create1.log**, in **/server/dbcommon/server** to verify the process was successful.

- 4 Continue to "Step 9: Copy the Database Files to the Client Workstation."

Step 9: Copy the Database Files to the Client Workstation

You must run the files **create2.bat** and **install_ssap.bat** from a machine running Windows. If you installed the database files on a Unix database server, or if you removed the files from the client workstation, copy the database files to a client workstation that is running Windows NT 4.0 with SP4 or higher, Windows 95, or Windows 98.

Note: If your database server is running Windows NT, you can skip this step and perform the remaining steps on the database server.

▶ To copy the files to the client workstation

Before you begin:

- ✓ Complete "Step 8: Run **create1.bat**"
 - ✓ Create the path into which you want to copy the database files. This can be any path on the client workstation.
- 1 Copy the entire folder named **server** to the client workstation. This folder is located in the path in which you copied or installed the database files on the database server, and includes the subdirectories **dbcommon**, **dbtools**, and **UIinitial**.
 - 2 Once you have copied the files to the database server, continue to "Step 10: Modify **sql.ini**."

*Note: Make a note of the path into which you copy the files. You will need to enter this path for the variable **INSTALL_HOME** in the **create2.bat** file.*

Step 10: Modify **sql.ini**

In order to run **create2.bat**, you need to create a stanza in the Sybase file **sql.ini** that points to the e*Index database server. This file provides a list of database servers to which the Sybase client can connect.

▶ To modify **sql.ini**

Before you begin:

- ✓ Complete "Step 9: Copy the Database Files to the Client Workstation"
- 1 On the machine from which you will run **create2.bat**, navigate to the path in the Sybase home directory where **sql.ini** is located. This should be in **\ini** subdirectory.
 - 2 Make a backup copy of the file **sql.ini**.

- 3 Create a stanza describing the server on which the database resides. The sample below provides an example of how the stanza may appear for an Adaptive Server named "challenger" using a TCP/IP connection. For more information about configuring this file, refer to your Sybase user documentation.

```
[challenger]
master=TCP,challenger,4100
query=TCP,challenger,4100
```

- 4 Continue to "Step 11: Modify **create2.bat**".

Step 11: Modify **create2.bat**

The file **create2.bat** is a batch file that you run to create the database tables, triggers, indexes, and so on. You need to modify certain variables in this file that tell the script how to locate the database instance and installation scripts.

► To modify **create2.bat**

Before you begin:

- ✓ Complete "Step 10: Modify **sql.ini**"

- 1 On the machine from which you will run **create2.bat**, navigate to the path where the database files are located, and then navigate to the **\server\dbcommon\client** directory.
- 2 Make a backup copy of the file **create2.bat**.
- 3 Right-click the **create2.bat** file and then select **Edit** from the list that appears. Do not double-click the file to open it.
- 4 Make the following modifications:
 - In the variable **SERVER**, enter the name of the Sybase Adaptive Server for the database.
 - In the variable **DATABASE**, enter the name of the database.
 - In the variable **INSTALLDRIVE**, enter the drive on which the database installation files are located.
 - In the variable **INSTALL_HOME**, enter the path in which the database installation files are located on the machine from which you will run **create2.bat**. Do not include the drive designation in this path. This is the path to the **server** directory (do not include **\server\dbcommon\server** in the pathname).
 - In the variable **SYSTEMPW**, enter the password for the administrator user ID for Sybase.

- The default value for the variable **UIPW** only needs to be changed if you modified the UI user password for e*Index after running **create1(.bat)**.

The sample below illustrates the **create2.bat** variables.

```
SET SERVER=SYBASE1
SET DATABASE=ei01
SET INSTALLDRIVE=C:
SET INSTALL_HOME=\TEMP\INSTALL
...
SET SYSEMPW=sybase
SET UIPW=eindex
```

5 Save the changes to **create2.bat** and close the file.

6 Do one of the following:

*If you want to install region-specific security in the database, continue to "Step 12: Modify **install_ssap.bat** (optional)."*

*If you do not want to install region-specific security in the database, skip to "Step 13: Run **create2.bat**."*

Step 12: Modify **install_ssap.bat** (optional)

Running **install_ssap.bat** installs the views you need in order to use the region-specific security capabilities of e*Index. You do not need to modify or run this file if you do not want to use this capability.



For more information about region-specific security, see "What is Region-Specific Security?" in Chapter 3 of the *e*Index Security User's Guide* and "About Region-Specific Security" in Chapter 3 of the *e*Index Administrator User's Guide*.

► To modify **install_ssap.bat**

Before you begin:

- ✓ Complete "Step 11: Modify **create2.bat**"
- 1** On the machine from which you will run **install_ssap.bat**, navigate to the path where the database files are located, and then navigate to the **\server\dbcommon\client** directory.
- 2** Make a backup copy of the file **install_ssap.bat**.
- 3** Right-click the **install_ssap.bat** file and then select **Edit** from the list that appears. Do not double-click this file to open it.
- 4** Make the following modifications:
 - In the variable **SERVER**, enter the name of the Sybase Adaptive Server for the database.

- In the variable **DATABASE**, enter the name of the database.
- In the variable **INSTALLDRIVE**, enter the drive on which the database installation files are located.
- In the variable **INSTALL_HOME**, enter the path in which the database installation files are located on the machine from which you will run **create2.bat**. Do not include the drive designation in this path. This is the path to the **server** directory (do not include **\server\dbcommon\server** in the pathname).
- In the variable **SYSTEMPW**, enter the password for the administrator user ID for Sybase.
- The default value for the variable **UIPW** only needs to be changed if you modified the UI user password for e*Index after running **create1(.bat)**.

The sample below illustrates the **create2.bat** variables.

```
SET SERVER=SYBASE1
SET DATABASE=ei01
SET INSTALLDRIVE=C:
SET INSTALL_HOME=\TEMP\INSTALL
...
SET SYSTEMPW=sybase
SET UIPW=eindex
```

- 5 Save the changes to **install_ssap.bat** and close the file.
- 6 Continue to "Step 13: Run **create2.bat**."

Step 13: Run create2.bat

Once you modify **create2.bat**, you can run the file to create the tables, views, indexes, and so on for your e*Index database.

Important! *If this process does not run successfully, do NOT run **create2.bat** a second time. Instead, verify that the variables you set for each file in the previous steps are correct, and then re-run **create1(.bat)** followed by **create2.bat**. If the process is still not successful, contact your SeeBeyond representative.*

► To run create2.bat

Before you begin:

- ✓ Complete "Step 11: Modify **create2.bat**" and, optionally, "Step 12: Modify **install_ssap.bat**"
- 1 On the machine from which you will run **create2.bat**, navigate to the path where the database files are located, and then navigate to the **\server\dbcommon\client** directory.
 - 2 Double-click **create2.bat** to run the batch file.

- 3 At the prompt, press any key on the keyboard to complete the installation.
- 4 Review the log files, located in the path you specified for your installation files in `\server\UIinitial\Spool`, to ensure that there were no errors during the running of the script.
- 5 If you want to install region-specific security, continue to "Step 14: Run `install_ssap.bat` (optional)." Otherwise, your installation is complete.

Step 14: Run `install_ssap.bat` (optional)

After you have run `create2.bat` to create the e*Index database, you can install system-specific security by running `install_ssap.bat`.

***Important!** Do not execute this file if you do not want to use region-specific security. Creating these views requires that you also define the regions associated with each system and assign them to user profiles before you can access e*Index information. If you install region-specific security but do not want to use the functionality, you can remove it by running `remove_ssap.bat`. You need to modify this file in the same way you modified `install_ssap.bat` in "Step 12: Modify `install_ssap.bat`" earlier in this chapter.*

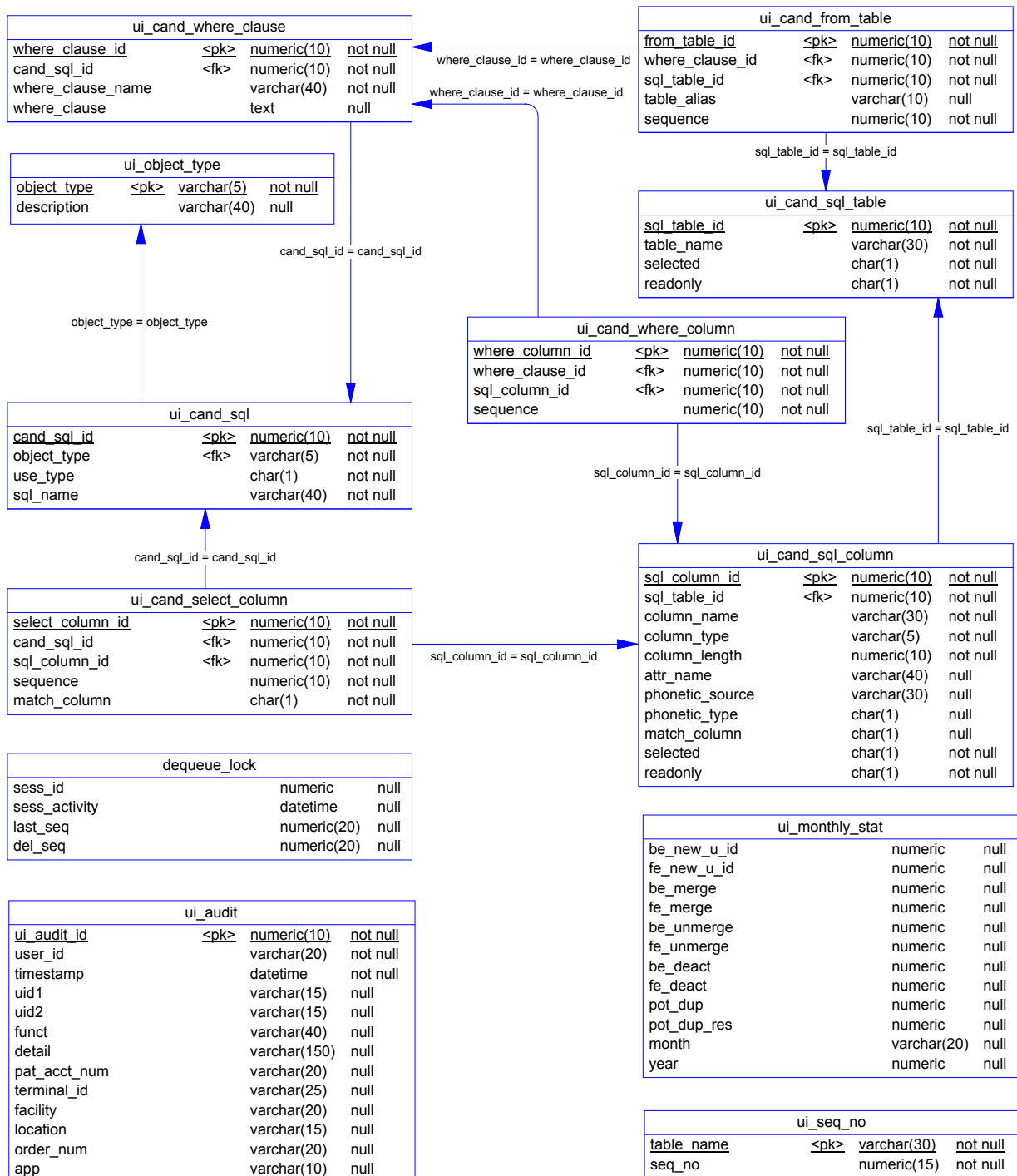
▶ To run `install_ssap.bat`

Before you begin:

- ✓ Complete "Step 13: Run `create2.bat`"
- 1 On the machine from which you will run `install_ssap.bat`, navigate to the path where the database files are located, and then navigate to the `\server\dbcommon\client` directory.
 - 2 Double-click `install_ssap.bat` to run the batch file.
 - 3 At the prompt, press any key on the keyboard to complete the installation.

e*Index 4.5.2 Sybase Database Model

The diagrams on the following pages illustrate the table structure for e*Index version 4.5.2 for Sybase. Your actual database may vary slightly from this model depending upon the release you have installed. The *ui_person* and *ui_transaction* tables are displayed on two different pages to better illustrate the connections to these two tables.



ui_config			
<u>interface</u>	<pk>	varchar(255)	not null
<u>code</u>	<pk>	varchar(255)	not null
value		numeric	not null

ui_control			
<u>ctrl_key</u>	<pk>	varchar(10)	not null
description		varchar(50)	null
ctrl_value		varchar(30)	null
create_date		datetime	null

ui_dept			
<u>dept_code</u>	<pk>	varchar(5)	not null
description		varchar(20)	null
date_time		datetime	null

ui_canned_msg			
<u>code</u>	<pk>	varchar(5)	not null
description		varchar(80)	not null
create_date		datetime	null

ui_message			
<u>code</u>	<pk>	varchar(5)	not null
description		varchar(255)	not null
message_box_header		varchar(50)	not null
icon		varchar(15)	null
button		varchar(20)	null
default_button		numeric(1)	null
message_type		varchar(8)	null
application		varchar(10)	null
date_time		datetime	null

ui_zip			
<u>zip_code</u>	<pk>	varchar(8)	not null
zip4		varchar(4)	null
<u>city</u>	<pk>	varchar(30)	not null
<u>state</u>	<pk>	varchar(10)	not null
county		varchar(3)	null
residence_code		varchar(4)	null
create_date		datetime	null

ui_comment			
<u>ui_comment_id</u>	<pk>	numeric(10)	not null
u_id		varchar(15)	not null
type		varchar(8)	not null
timestamp		datetime	not null
comment_text		text	null
ui_org		varchar(15)	null

ui_msg_header			
<u>ui_msg_header_id</u>	<pk>	numeric(20)	not null
queue_id		char(1)	not null
errors		numeric(10)	not null
create_date		datetime	not null
create_userid		varchar(20)	not null

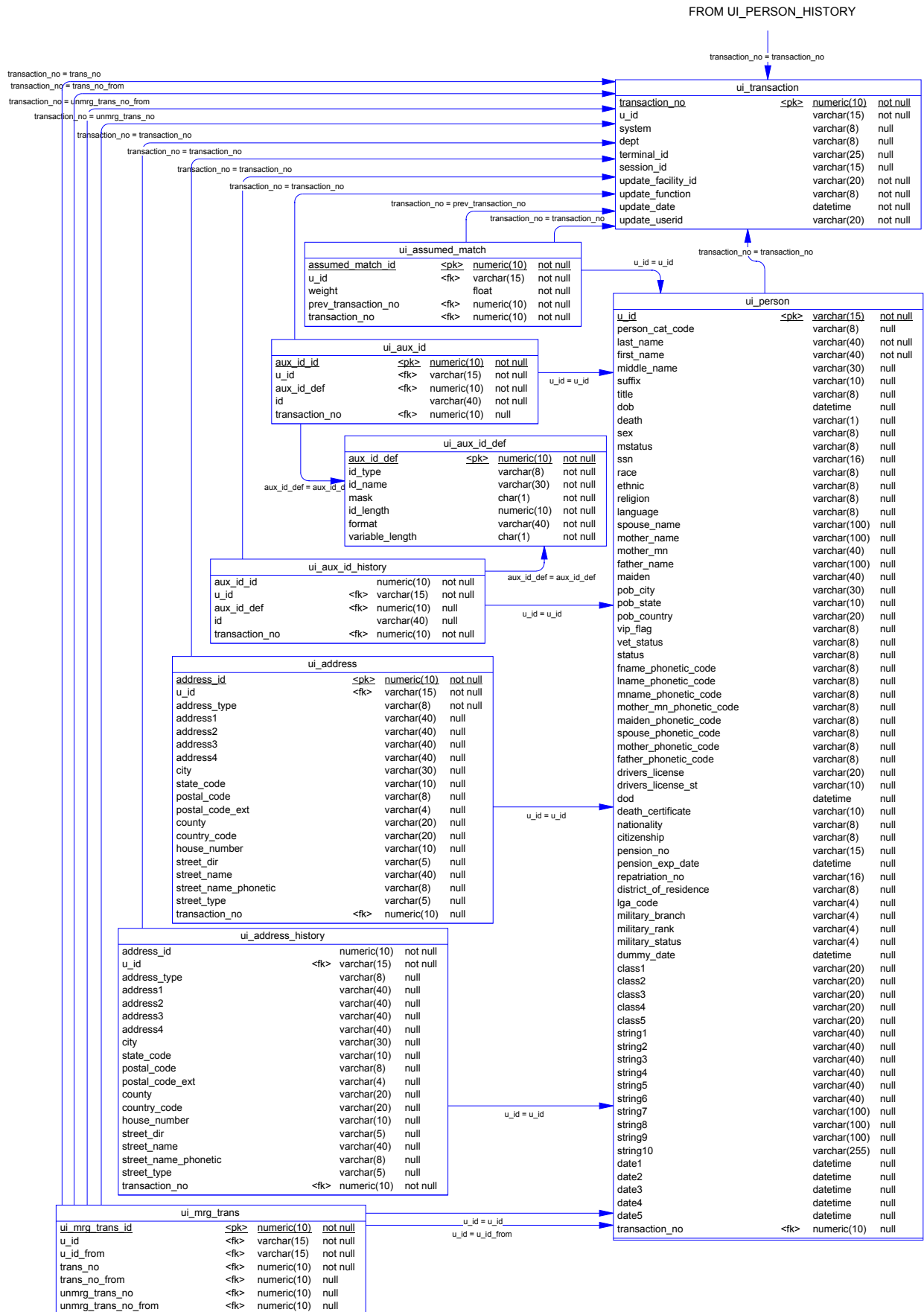
ui_msg_header_id = ui_msg_header_id

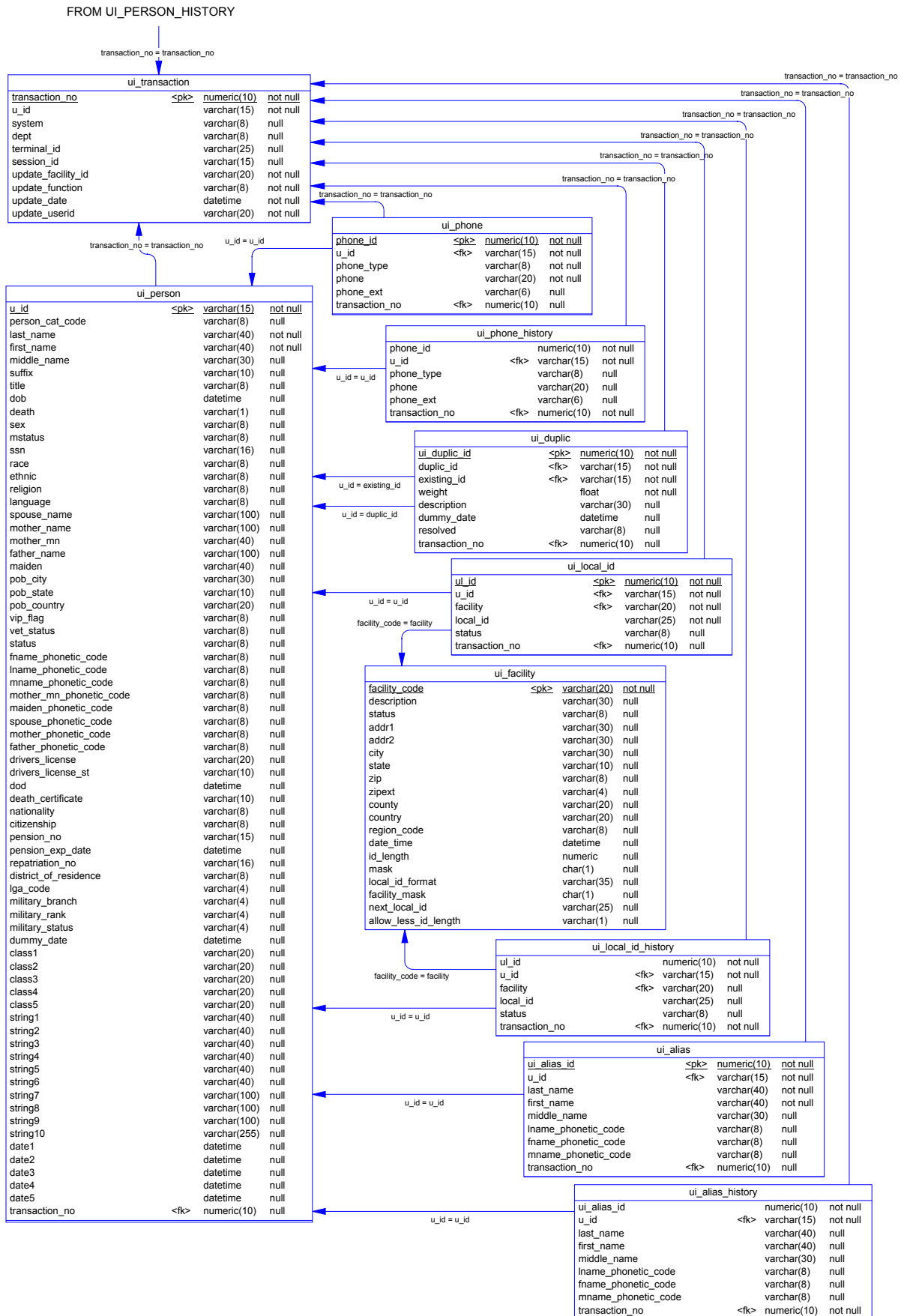
ui_msg_detail			
<u>ui_msg_detail_id</u>	<pk>	numeric(20)	not null
ui_msg_header_id	<fk>	numeric(20)	null
msg		varchar(255)	not null

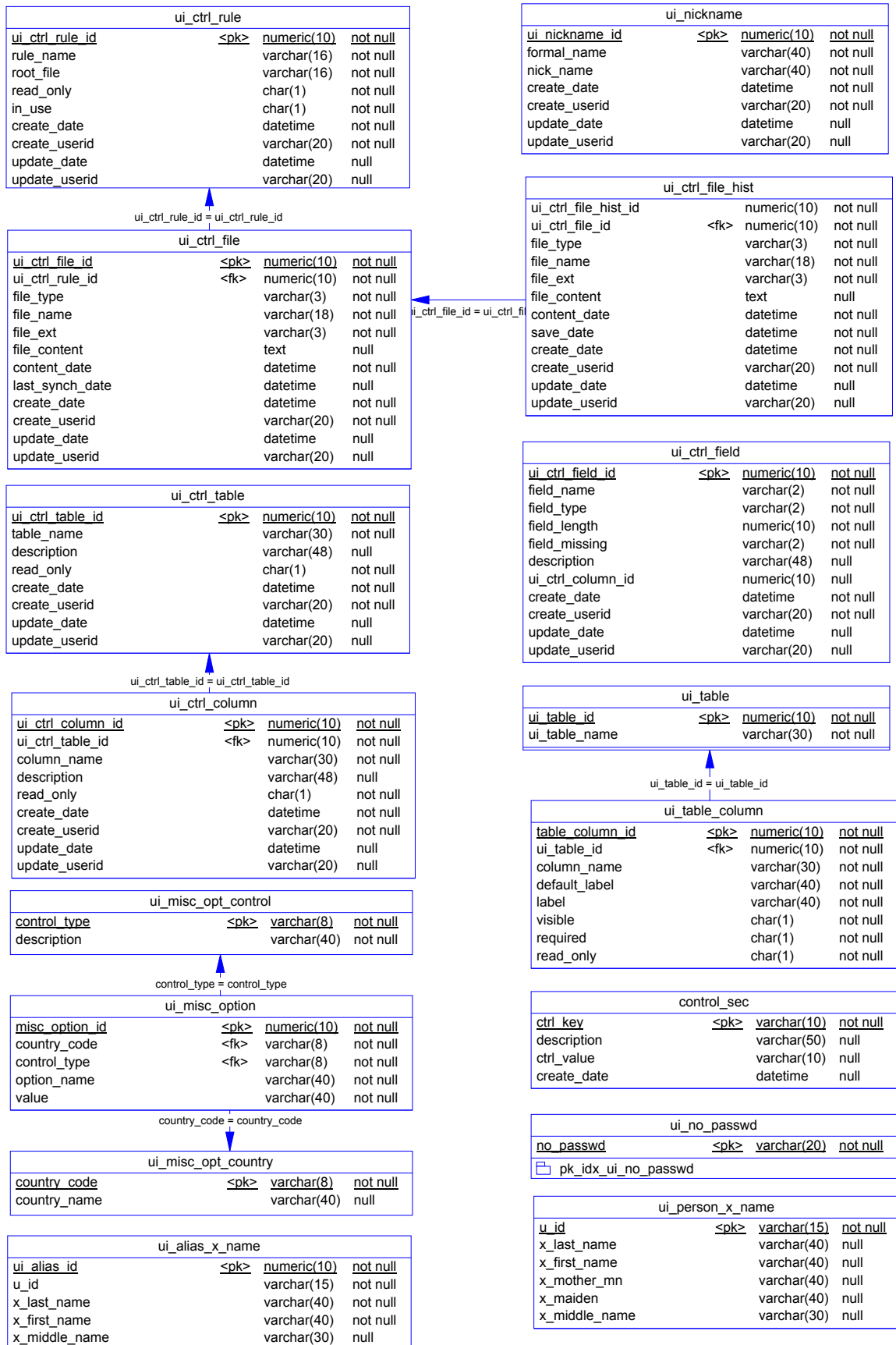
ui_person_history			
<u>ui_person_history_id</u>	<pk>	numeric(10)	not null
u_id		varchar(15)	not null
person_cat_code		varchar(8)	null
last_name		varchar(40)	null
first_name		varchar(40)	null
middle_name		varchar(30)	null
suffix		varchar(10)	null
title		varchar(8)	null
dob		datetime	null
death		varchar(1)	null
sex		varchar(8)	null
mstatus		varchar(8)	null
ssn		varchar(16)	null
race		varchar(8)	null
ethnic		varchar(8)	null
religion		varchar(8)	null
language		varchar(8)	null
spouse_name		varchar(100)	null
mother_name		varchar(100)	null
mother_mn		varchar(40)	null
father_name		varchar(100)	null
maiden		varchar(40)	null
pob_city		varchar(30)	null
pob_state		varchar(10)	null
pob_country		varchar(20)	null
vip_flag		varchar(8)	null
vet_status		varchar(8)	null
status		varchar(8)	null
fname_phonetic_code		varchar(8)	null
lname_phonetic_code		varchar(8)	null
mname_phonetic_code		varchar(8)	null
mother_mn_phonetic_code		varchar(8)	null
maiden_phonetic_code		varchar(8)	null
spouse_phonetic_code		varchar(8)	null
mother_phonetic_code		varchar(8)	null
father_phonetic_code		varchar(8)	null
drivers_license		varchar(20)	null
drivers_license_st		varchar(10)	null
dod		datetime	null
death_certificate		varchar(10)	null
nationality		varchar(8)	null
citizenship		varchar(8)	null
pension_no		varchar(15)	null
pension_exp_date		datetime	null
repatriation_no		varchar(16)	null
district_of_residence		varchar(8)	null
lga_code		varchar(4)	null
military_branch		varchar(4)	null
military_rank		varchar(4)	null
military_status		varchar(4)	null
dummy_date		datetime	null
class1		varchar(20)	null
class2		varchar(20)	null
class3		varchar(20)	null
class4		varchar(20)	null
class5		varchar(20)	null
string1		varchar(40)	null
string2		varchar(40)	null
string3		varchar(40)	null
string4		varchar(40)	null
string5		varchar(40)	null
string6		varchar(40)	null
string7		varchar(100)	null
string8		varchar(100)	null
string9		varchar(100)	null
string10		varchar(255)	null
date1		datetime	null
date2		datetime	null
date3		datetime	null
date4		datetime	null
date5		datetime	null
transaction_no	<fk>	numeric(10)	not null

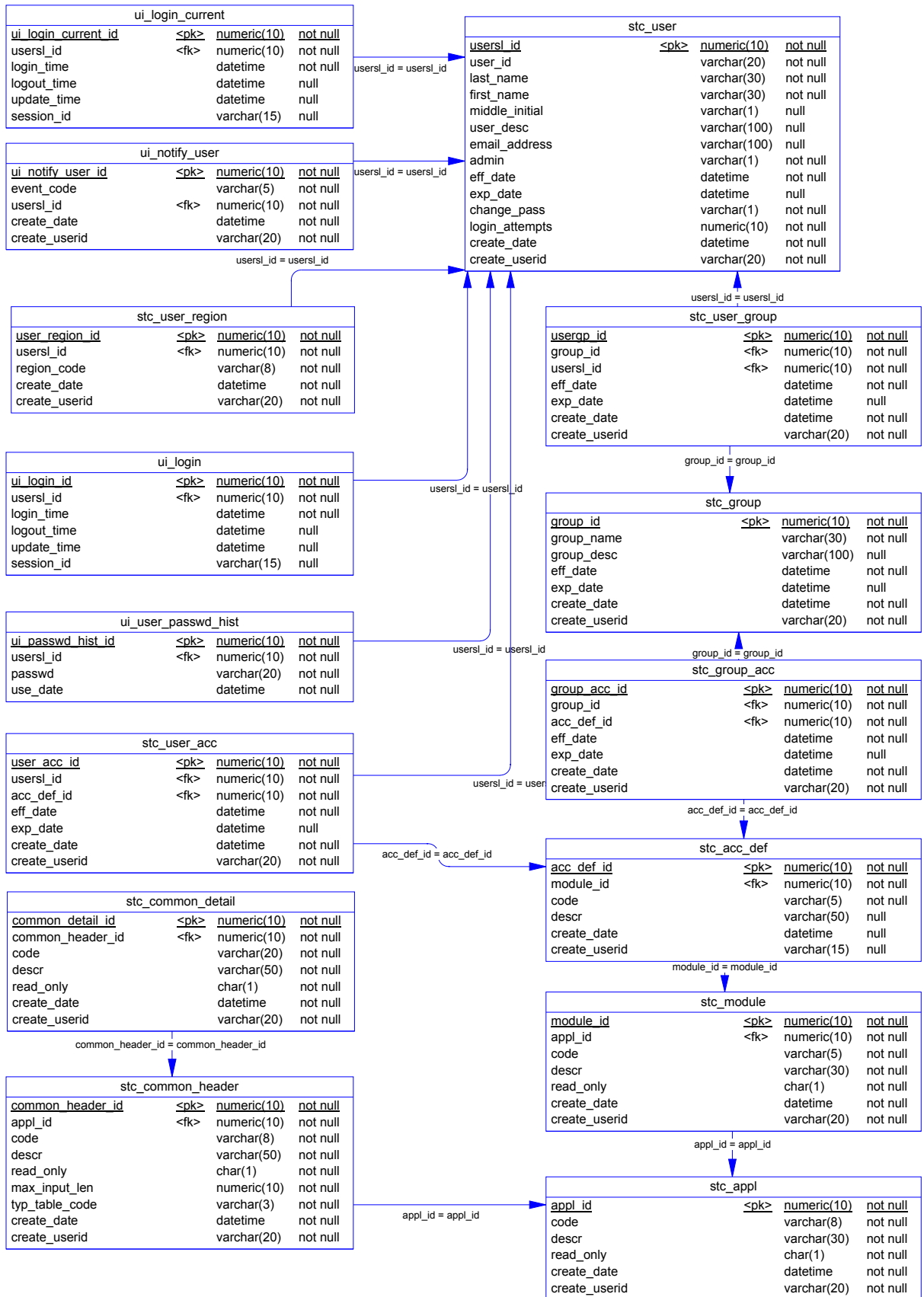
transaction_no = transaction_no

TO UI_TRANSACTION









Installing a SQL Server Database

About this Chapter

Overview

This chapter presents the background information and the step-by-step instructions you need to install an e*Index 4.5.2 database for Microsoft SQL Server. The following diagram illustrates the major topics in this chapter. For the page numbers on which specific topics appear, see the next page of this chapter.

**About the
Installation**

Learn about installing and modifying the database files

**Create the
Database**

Learn how to install the database files, and to modify and run the database scripts

**Physical Data
Model**

View a physical data model of the e*Index database

What's Inside

This chapter provides background information and instructions related to the topics listed below.

Learning About the Database Installation	3-3
Creating the Database.....	3-4
▶ Step 1: Obtain Database Information	3-4
▶ Step 2: Install Microsoft SQL Server	3-5
▶ Step 3: Install the Database and Report Files	3-5
▶ Step 4: Copy the Files to the Database Server	3-9
▶ Step 5: Create the Database Path.....	3-10
▶ Step 6: Modify defs.sql	3-10
▶ Step 7: Modify create1.bat	3-12
▶ Step 8: Define the ODBC Data Source	3-13
▶ Step 9: Modify create2.bat	3-14
▶ Step 10: Modify install_ssap.bat (optional).....	3-15
▶ Step 11: Run create1.bat	3-16
▶ Step 12: Run create2.bat	3-17
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e*Index 4.5.2 SQL Server Database Model	3-19

Learning About the Database Installation

Overview

This section of the chapter provides background information about the files you install, modify, and execute to create an e*Index 4.5.2 database for Microsoft SQL Server.

What do I Need to Know Before I Start?

Before beginning, you should determine the path in which you want the database to reside, the name you want to assign the database, and the administrator password for the database. You should also gather information about the database size requirements because you will need to specify the data and log file sizes before running the installation scripts. It is helpful to be familiar with your SQL Server environment and with Microsoft SQL Server networking and administration.

What are the Database Scripts?

Installing the database files creates several SQL scripts that you use to create and test the new database. You run two batch files, **create1.bat** and **create2.bat**, on the database server to call the SQL scripts that create the database and database instance. **create1.bat** creates a database instance for your e*Index database, and **create2.bat** creates the actual e*Index database tables, views, indexes, and so on. You can run an optional script, **install_ssap.bat**, to install region-specific security capabilities (for more information about region-specific security, see Chapter 3 of the *e*Index Security User's Guide*).

How do I Customize the Installation Files?

Installing the new e*Index 4.5.2 database requires a few modifications to the database scripts and related files in order to install the database in the correct location. You need to specify a name for the database. Make sure the name you select is different from any existing databases on the database server. The files you need to modify include: **defs.sql**, **create1.bat**, **create2.bat**, and optionally **install_ssap.bat**. Each modification is described in the appropriate procedure later in this chapter. We recommend that a Microsoft SQL Server database administrator perform these changes.

Creating the Database

Overview

To install an e*Index 4.5.2 database on Microsoft SQL Server, you must complete the following steps:

- Step 1: Obtain Database Information
- Step 2: Install Microsoft SQL Server
- Step 3: Install the Database and Report Files
- Step 4: Copy the Files to the Database Server
- Step 5: Create the Database Path
- Step 6: Modify **defs.sql**
- Step 7: Modify **create1.bat**
- Step 8: Define the ODBC Data Source
- Step 9: Modify **create2.bat**
- Step 10: Modify **install_ssap.bat** (optional)
- Step 11: Run **create1.bat**
- Step 12: Run **create2.bat**
- Step 13: Run **install_ssap.bat** (optional)

*Note: If you chose to install all components of e*Index when you installed the e*Index schema files, you should have already completed steps 1 through 3. You can begin with "Step 4: Copy the Files to the Database Server."*

Step 1: Obtain Database Information

Before beginning, you should know the server name and the path in which you want to install the e*Index database, and the name you want to assign the new database. Make sure the name you select is different from the name of any existing databases on the database server. You should also obtain information about your database size requirements because you need to specify the file sizes before running the installation scripts. The file **defs.sql** lists the files you need to size, and is described later in this chapter. Because of the complex nature of creating a database, we recommend that a database administrator create your database.

Step 2: Install Microsoft SQL Server

In order to perform the server side installation, you must install Microsoft SQL Server 7.0 on the database server. When you install SQL Server, make a note of the path in which you install the program. You will need to specify this information later in the **create2.bat** file. For information about installing SQL Server, refer to the appropriate installation documentation for SQL Server 7.0.

***Important!** It is crucial that the SQL Server installation is operational prior to performing the following steps.*

Step 3: Install the Database and Report Files

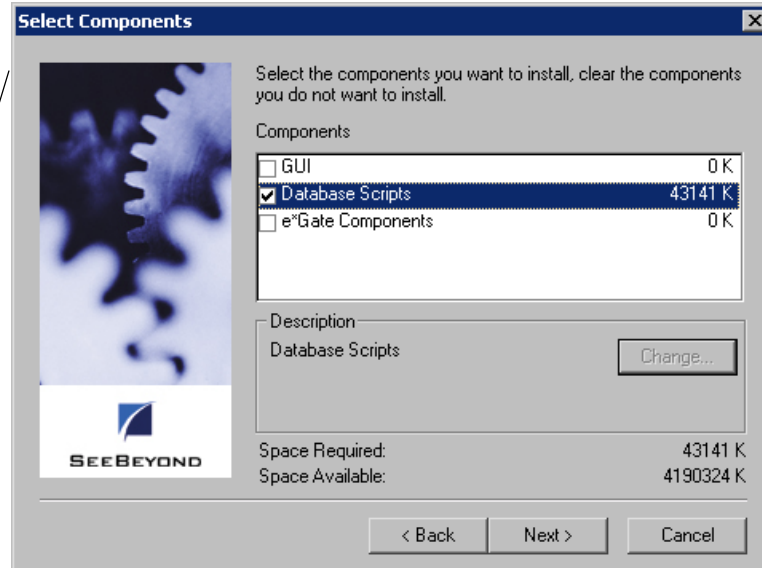
Installing the database and report files is very similar to the process you followed to install the e*Index schema files.

▶ To install the database and report files

Before you begin:

- ✓ Complete "Step 2: Install Oracle"
 - ✓ Make sure the e*Index installation CD-ROM is inserted into the CD-ROM drive of your database server
- 1 Follow steps 1 through 7 under "Step 6: Install the e*Index Schema Files" in Chapter 2, "Installing the e*Index Schema Files." The Select Components window should now be visible.
 - 2 On the Select Components window, select the check box next to **Database Scripts**.

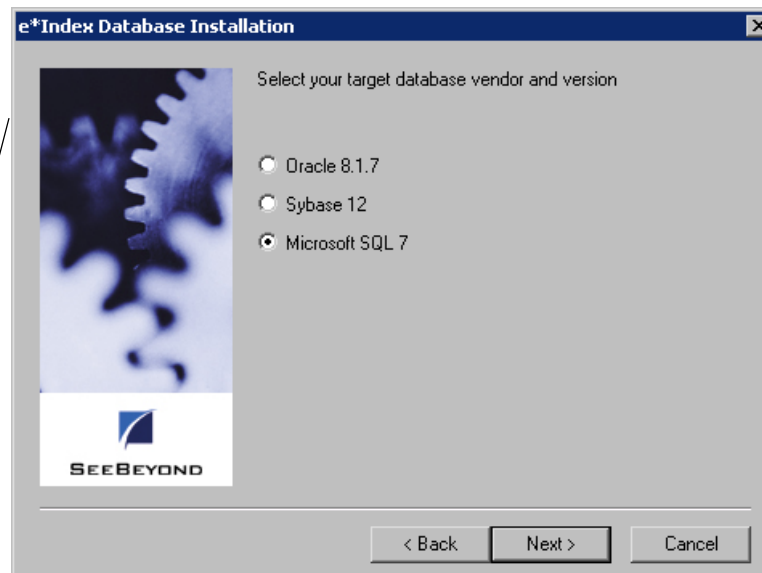
Select the components you want to install on the Select Components window



Next >
Next button

3 Click **Next**. The e*Index Database Installation window appears.

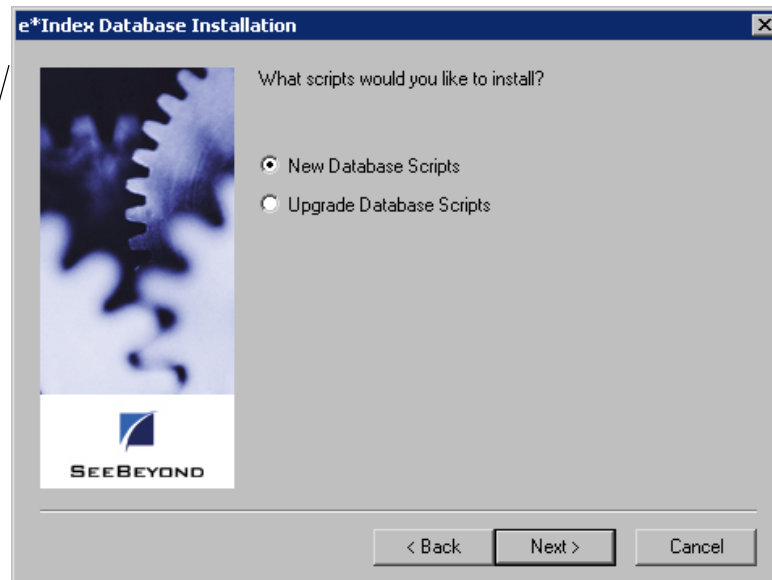
On the e*Index Database Installation window, specify Microsoft SQL Server for the database platform



Next >
Next button

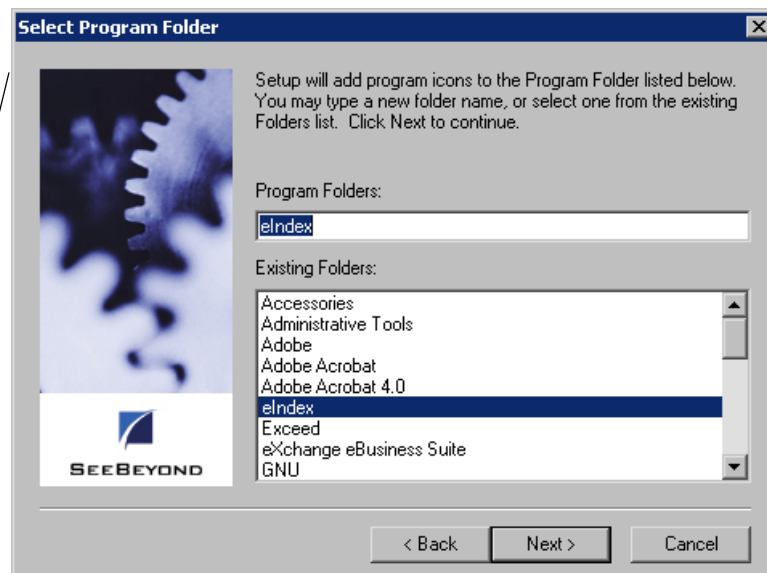
4 Select **Microsoft SQL 7**, and then click **Next**. A second e*Index Database Installation window appears.

Specify whether to install the scripts to install a new database or the scripts to upgrade an existing database

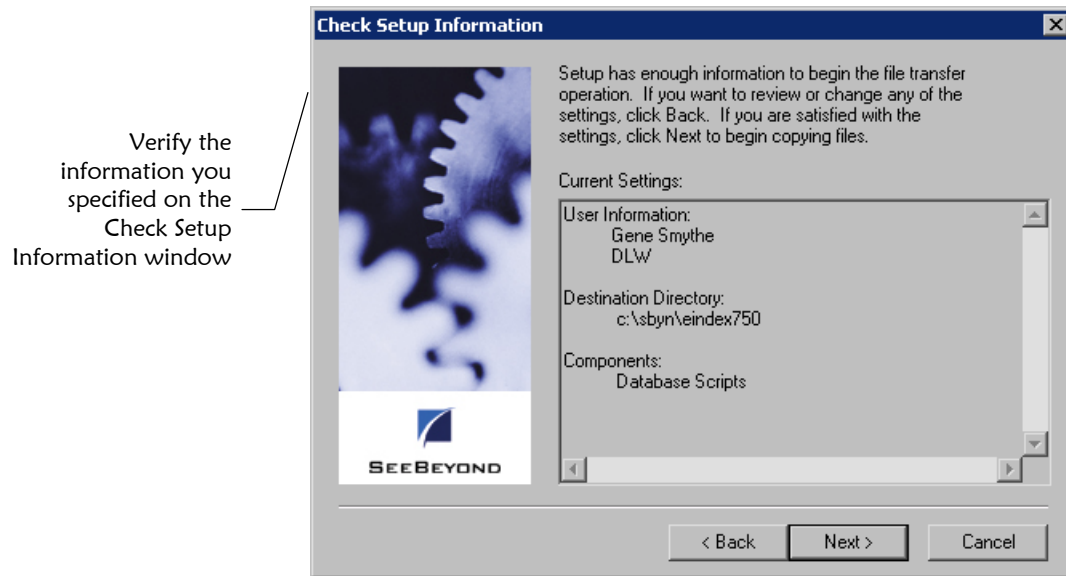


- 5 Select **New Database Scripts**, and then click **Next**. The Select Program Folder window appears.

Specify the folder in which to install the program icons on the Select Program Folder window



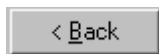
- 6 Enter the name of the folder into which you want to install the program icons or accept the default name, and then click **Next**. The Check Setup Information window appears.



7 Verify the information you specified, and do one of the following:

*To change any of the options you selected, click **Back**, and make the necessary changes.*

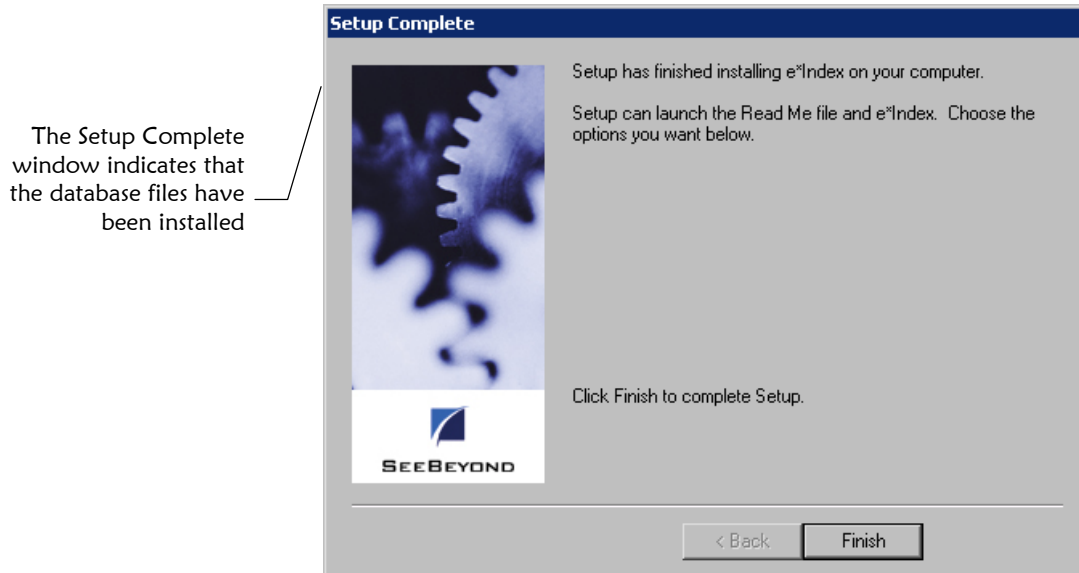
*To continue with the installation, click **Next**. When all files are installed, the Setup Complete window appears.*



Back button



Next button



Finish button

8 Click **Finish** to complete the setup process.

- 9 To view the database files that were installed:
- Open Windows Explorer and navigate to the path you specified for the installation files.
 - Open the `\server\DBcommon` subdirectory. You will find two subdirectories, **Server** and **Client**, and one file, `defs.sql`. The **Client** directory contains the batch files, `create2.bat`, `install_ssap.bat`, and `remove_ssap.bat`. The **Server** directory contains the files you need to create the database instance on your server.

- 10 Do one of the following:

If you installed the database files on a machine other than the database server, continue to "Step 4: Copy the Files to the Database Server."

If you installed the database files on the database server, continue to "Step 5: Create the Database Path."

Step 4: Copy the Files to the Database Server

If you did not install the database files on the database server (as would be the case if you installed all *Index files at once on a client machine), you need to copy the files to the database server.

▶ To copy the files to the database server

Before you begin:

- ✓ Complete "Step 3: Install the Database and Report Files"
- ✓ Create the path into which you want to copy the database files. This can be any path on the database server.

- 1 Move the entire folder named **server** that was created in the installation path from step 3 above to the path you created on the database server. This folder includes the subdirectories **DBcommon**, **DBtools**, and **UIinitial**.
- 2 Once you have moved the files to the database server, continue to "Step 5: Create the Database Path."

Note: Make a note of the path into which you copy the files. You will need to enter this path for the variable `INSTALL_HOME` in the `create2.bat` file.

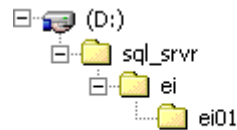
Step 5: Create the Database Path

If you did not install the database and report files in the path in which you want the database to reside, you need to create the folders for the database path.

► To create the database path

Before you begin:

- ✓ If necessary, complete "Step 4: Copy the Files to the Database Server"
 - ✓ Determine the path in which you want to create your database on the database server
- 1 On the database server, create the path to the directory where you want to place the database files. This is the path you will specify in the file **defs.sql** in "Step 6: Modify **defs.sql**." SeeBeyond recommends using the name of the database as the name of the last folder in the database home directory. The path shown below illustrates the path you would create for the variables defined in the **defs.sql** example on page 5-11.



- 2 Continue to "Step 6: Modify **defs.sql**".

Step 6: Modify defs.sql

The file **defs.sql** defines certain variables used by the setup scripts to determine where to place the structures and how to allocate storage. Use this file to define data and log file sizes as well.

Notes:

- View your **defs.sql** file for a complete list of data and log file variables that you can modify, along with the default values.
 - Please refer to the appropriate SQL Server user documentation to help determine the most efficient method of sizing and distributing the database.
 - A database administrator should perform this step.
-

► To modify the defs.sql file

Before you begin:

- ✓ Complete "Step 5: Create the Database Path" or verify that the path to your database home directory exists
- 1 On the database server, navigate to the path you specified when you installed your database files, or, if you copied the files to the database server, navigate to the path to which you copied the database files. Open the subdirectory `\server\DBcommon`.
- 2 In the **DBcommon** directory, make a backup copy of the **defs.sql** file and then open the **defs.sql** file in any text editor.
- 3 In the variable **set @DATABASE**, enter the name of the database, leaving the single quotes around the name.
- 4 In the variable **set @DBPATH**, enter the path you created in "Step 5: Create the Database Path", leaving the single quotes around the pathname.
- 5 In the variable **set @UIPASSWD**, enter the password of the e*Index administrator (only change the default value if you want to change the password for the default e*Index administrator user).

The excerpt from **defs.sql** below illustrates sample definitions for the variables you need to modify. These variables reflect the sample path displayed earlier in "Step 5: Create the Database Path."

```
set @DATABASE = "ei01"  
set @DBPATH = "D:\sql_srvr\ei\ei01"  
...  
  
set @UIPASSWD = "eindex"
```

Notes:

- You should not need to modify the variable **@UIPASSWD**, but you can if you want to change the default password.
 - The path you enter in **@DBPATH** is the database home directory.
 - Make sure you leave the double quotes around the pathname and enter the database drive at the beginning of the database path (as shown above).
-
- 6 Modify the file sizes for your database as required for your specific installation. The sample file sizes represent the minimum values recommended by SQL Server. A database administrator who is familiar

with your processing requirements should perform this step, since they can best determine the sizing needs of your database. Refer to your SQL Server documentation for more information. The excerpt below illustrates the variables you can modify to customize the size of your database.

```
set @PFSIZE = '30MB'  
set @FGSIZE = '50MB'  
set @LOGSIZE = '40MB'
```

- 7 Save and close the file, and continue to "Step 7: Modify **create1.bat**."

Step 7: Modify **create1.bat**

The file **create1.bat** is a batch file that you run to create your database instance. You need to modify certain variables in this file that tell the script where to create the database.

► To modify **create1.bat**

Before you begin:

- ✓ Complete "Step 6: Modify **defs.sql**"

- 1 Navigate to the path where the database files are located on the database server, and then navigate to the **server\DBcommon\Server** directory.
- 2 Make a backup copy of the **create1.bat** file.
- 3 Right-click on the **create1.bat** file, and then select **Edit** from the drop-down list that appears. Do not double-click this file to open it.
- 4 Make the following modifications:
 - In the variable **SERVER**, enter the name of the machine on which the e*Index database will reside.
 - In the variable **set SA_PASSWD**, enter the password for the system administrator user for SQL Server.

An example of the above variables would appear similar to this:

```
set SERVER=SQLSVR  
  
...  
set SA_PASSWD=eindex
```

- 5 Save and close the file. Continue to "Step 8: Define the ODBC Data Source".

Step 8: Define the ODBC Data Source

In order for **create2.bat** to connect to the e*Index database, you need to define an ODBC data source for the database. The data source specifies the driver used to connect to the database and additional information about the database.

► To define the ODBC data source

Before you begin:

- ✓ Obtain information about the e*Index database, such as the database name, server address, and so on
- ✓ Complete "Step 7: Modify **create1.bat**"

Note: This may vary depending on the version of Windows on the database server.

- 1** On the Windows Start menu, select **Control Panel**, and then select **Data Sources (ODBC)**.
- 2** On the ODBC Data Source Administrator window, click **Add**.
- 3** On the Create New Data Source window, select **SQL Server** and then click **Finish**.
- 4** On the "Create a New Data Source to SQL Server" window, enter the name of the database, a brief description (optional), and the name of the server on which the database resides.
- 5** Click **OK**. The ODBC Microsoft SQL Server Setup window appears.
- 6** On the ODBC Microsoft SQL Server Setup window, verify the configuration of the data source, and then click **OK**. The ODBC Data Source Administrator window reappears.

Note: You can change the configuration information by selecting the data source name and then clicking **Configure...** on the ODBC Data Source Administrator window.

- 7** Continue to "Step 9: Modify **create2.bat**."

Step 9: Modify create2.bat

The file **create2.bat** is a batch file that creates the database tables, triggers, indexes, and so on. You need to modify certain variables in this file that tell the script how to locate the database instance and installation scripts.

► To modify create2.bat

Before you begin:

- ✓ Complete "Step 8: Define the ODBC Data Source"
- 1 Navigate to the path where the database files are located on the database server, and then navigate to the **server\DBcommon\Client** directory.
 - 2 Make a backup copy of the file **create2.bat**.
 - 3 Right-click the **create2.bat** file and then select **Edit** from the list that appears. Do not double-click this file to open it.
 - 4 Make the following modifications:
 - In the variable **SERVER**, enter the name of the machine on which the database will reside.
 - In the variable **DATABASE**, enter the name of the database.
 - In the variable **ODBC_DSN**, enter the name of the ODBC data source you defined in the ODBC Data Source Administrator.
 - In the variable **INSTALLDRIVE**, enter the drive on which the database installation files are located.
 - In the variable **INSTALL_HOME**, enter the path in which the database files are located. Do not include the drive designation in this path, and do not include the subdirectories **\server\DBcommon\Client**.
 - In the variable **SYSTEMPW**, enter the system administrator password for SQL Server.
 - Only modify the default value for **UIPW** if you changed the password in the **@UIPASSWD** in the **defs.sql** file. These values should be the same.

The sample below illustrates the above variables.

```
SET SERVER=SQLSVR
SET DATABASE=ei01
SET ODBC_DSN=EI01
SET INSTALLDRIVE=C:
SET INSTALL_HOME=\TEMP\INSTALL

...
SET SYSEMPW=eindex
SET UIPW=UI
```

5 Save the changes to **create2.bat** and close the file.

6 Do one of the following:

*If you want to install region-specific security in the database, Continue to "Step 10: Modify **install_ssap.bat**."*

*If you do not want to install region-specific security in the database, skip to "Step 11: Run **create1.bat**."*

Step 10: Modify **install_ssap.bat** (optional)

Running **install_ssap.bat** installs the views you need in order to use the region-specific security capabilities of e*Index. You do not need to modify or run this file if you do not want to use this capability.



For more information about region-specific security, see "What is Region-Specific Security?" in Chapter 3 of the *e*Index Security User's Guide* and "About Region-Specific Security" in Chapter 3 of the *e*Index Administrator User's Guide*.

▶ To modify **install_ssap.bat**

Before you begin:

- ✓ Complete "Step 9: Modify **create2.bat**"
- 1** Navigate to the path where the database files are located on the database server, and then navigate to the **\server\DBcommon\Client** directory.
- 2** Make a backup copy of the file **install_ssap.bat**.
- 3** Right-click the **install_ssap.bat** file and then select **Edit** from the list that appears.
- 4** Make the following modifications:

- In the variable **SERVER**, enter the name of the machine on which the database will reside.
- In the variable **DATABASE**, enter the name of the database.
- In the variable **INSTALLDRIVE**, enter the drive on which the database installation files are located.
- In the variable **INSTALL_HOME**, enter the path in which the database files are located. Do not include the drive designation in this path, and do not include the subdirectories **\server\DBcommon\Server**.
- In the variable **SYSTEMPW**, enter the system administrator password for SQL Server.
- You should not need to modify the default value for the variable **UIPW** unless you changed it in **defs.sql** and **create2.bat**.

The sample below illustrates the variables you need to modify.

```
SET SERVER=SQLSVR
SET DATABASE=ei01
SET INSTALLDRIVE=C:
SET INSTALL_HOME=\TEMP\INSTALL

...
SET SYSTEMPW=eindex
SET UIPW=UI
```

- 5 Save the changes to **install_ssap.bat** and close the file.
- 6 Continue to "Step 11: Run **create1.bat**."

Step 11: Run **create1.bat**

You are now ready to run the script to install your database instance. This may take several minutes depending on the size of your installation. You must run this script from the server where the database resides.

▶ To run **create1.bat**

Before you begin:

- ✓ Complete "Step 9: Modify **create2.bat**" and, optionally, "Step 10: Modify **install_ssap.bat**"
- 1 On your database server, navigate to the path in which the database files are located, and then to the **\server\DBcommon\Server** directory.

- 2 Double-click the **create1.bat** file. The database script begins to execute. This will take several minutes.

Note: You can also run this file from an MS-DOS command prompt, which gives you more control over the display of the batch file process.

- 3 Check the log files in `\server\DBcommon\Server` to verify the process was successful.
- 4 Continue to "Step 12: Run **create2.bat**."

Step 12: Run **create2.bat**

After you have created the database instance by running **create1.bat**, you can run **create2.bat** to create the tables, views, indexes, and so on for your e*Index database.

Important! If this process does not run successfully, do NOT run **create2.bat** a second time. Instead, verify that the variables you set for each file in the previous steps are correct, and then re-run **create1.bat** followed by **create2.bat**. If the process is still not successful, contact your SeeBeyond representative.

▶ To run **create2.bat**

Before you begin:

- ✓ Complete "Step 11: Run **create1.bat** "
- 1 Navigate to the path where the database files are located on the database server, and then navigate to the `server\DBcommon\Client` directory.
 - 2 Double-click **create2.bat** to run the batch file.
 - 3 Log files are created in the path you specified for your installation files in `\server\UInitial\Spool`. Review each log file to ensure that there were no errors during the running of the script.
 - 4 At the prompt, press any key on the keyboard to complete the installation.
 - 5 If you want to install region-specific security in the database, continue to "Step 13: Run **install_ssap.bat** (optional)." Otherwise, your database installation is complete.

Step 13: Run `install_ssap.bat` (optional)

After you have run `create2.bat` to create the e*Index database, you can install system-specific security by running `install_ssap.bat`.

***Important!** Do not execute this file if you do not want to use region-specific security. Creating these views requires that you also define the regions associated with each system and assign them to user profiles before you can access e*Index information. If you install region-specific security but do not want to use the functionality, you can remove it by running `remove_ssap.bat`. You need to modify this file in the same way you modified `install_ssap.bat` in "Step 11: Modify `install_ssap.bat`" earlier in this chapter.*

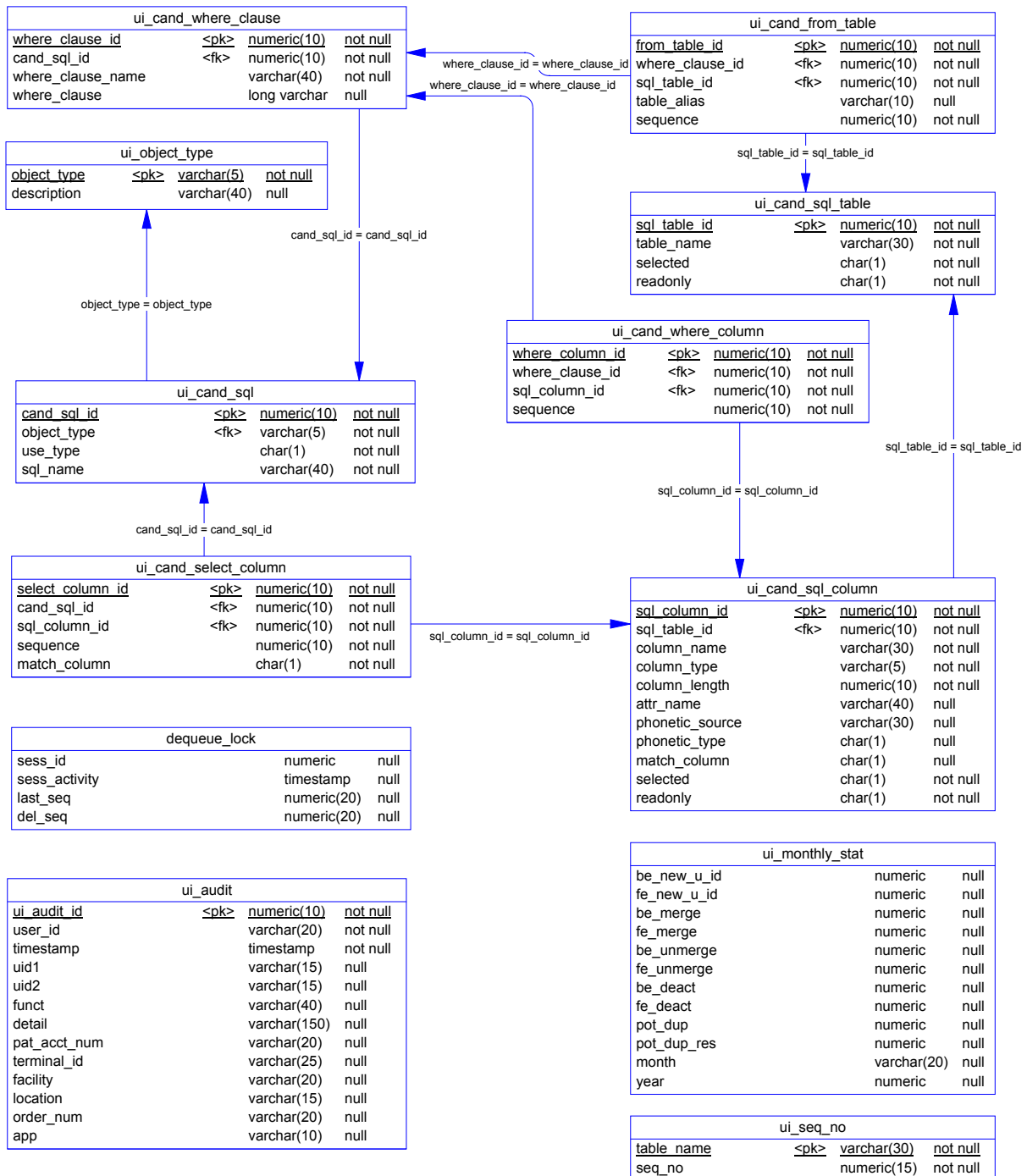
► To run `install_ssap.bat`

Before you begin:

- ✓ Complete "Step 12: Run `create2.bat`"
- 1** Navigate to the path where the database files are located on the database server, and then navigate to the `server\DBcommon\Client` directory.
- 2** Double-click `install_ssap.bat` to run the batch file.
- 3** At the prompt, press any key on the keyboard to complete the installation.

e*Index 4.5.2 SQL Server Database Model

The diagrams on the following pages illustrate the table structure for e*Index version 4.5.2 for SQL Server. Your actual database may vary slightly from this model depending on the release you have installed. The *ui_person* and *ui_transaction* tables are displayed on two different pages to better illustrate the connections to these two tables.



ui_config			
<u>interface</u>	<pk>	varchar(255)	not null
<u>code</u>	<pk>	varchar(255)	not null
value		numeric	not null

ui_control			
<u>ctrl_key</u>	<pk>	varchar(10)	not null
description		varchar(50)	null
ctrl_value		varchar(30)	null
create_date		timestamp	null

ui_dept			
<u>dept_code</u>	<pk>	varchar(5)	not null
description		varchar(20)	null
date_time		timestamp	null

ui_canned_msg			
<u>code</u>	<pk>	varchar(5)	not null
description		varchar(80)	not null
create_date		timestamp	null

ui_message			
<u>code</u>	<pk>	varchar(5)	not null
description		varchar(255)	not null
message_box_header		varchar(50)	not null
icon		varchar(15)	null
button		varchar(20)	null
default_button		numeric(1)	null
message_type		varchar(8)	null
application		varchar(10)	null
date_time		timestamp	null

ui_zip			
<u>zip_code</u>	<pk>	varchar(8)	not null
zip4		varchar(4)	null
<u>city</u>	<pk>	varchar(30)	not null
<u>state</u>	<pk>	varchar(10)	not null
county		varchar(3)	null
residence_code		varchar(4)	null
create_date		timestamp	null

ui_comment			
<u>ui_comment_id</u>	<pk>	numeric(10)	not null
u_id		varchar(15)	not null
type		varchar(8)	not null
timestamp		timestamp	not null
comment_text		long varchar	null
ui_org		varchar(15)	null

ui_msg_header			
<u>ui_msg_header_id</u>	<pk>	numeric(20)	not null
queue_id		char(1)	not null
errors		numeric(10)	not null
create_date		timestamp	not null
create_userid		varchar(20)	not null

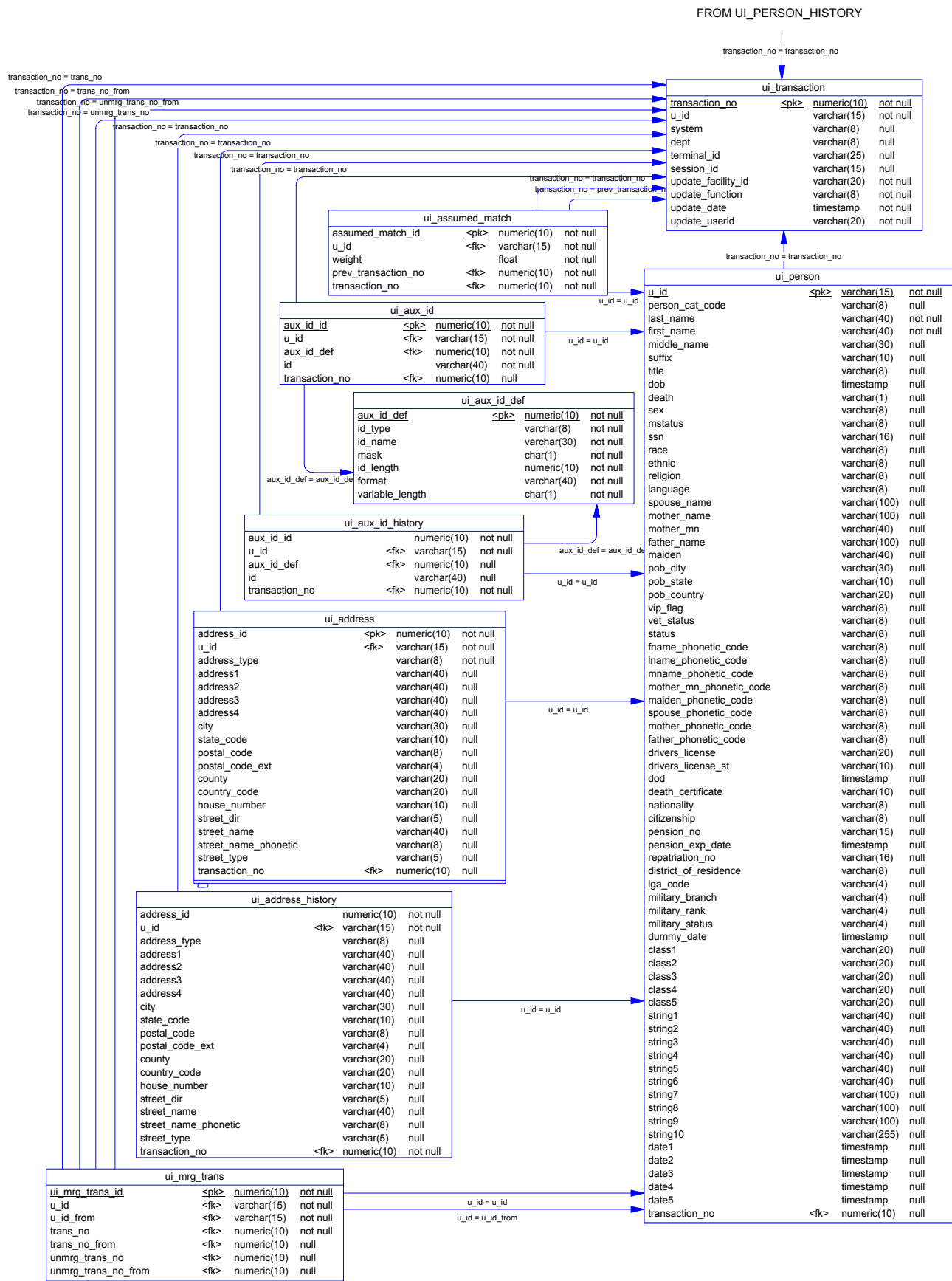
ui_msg_header_id = ui_msg_header_id

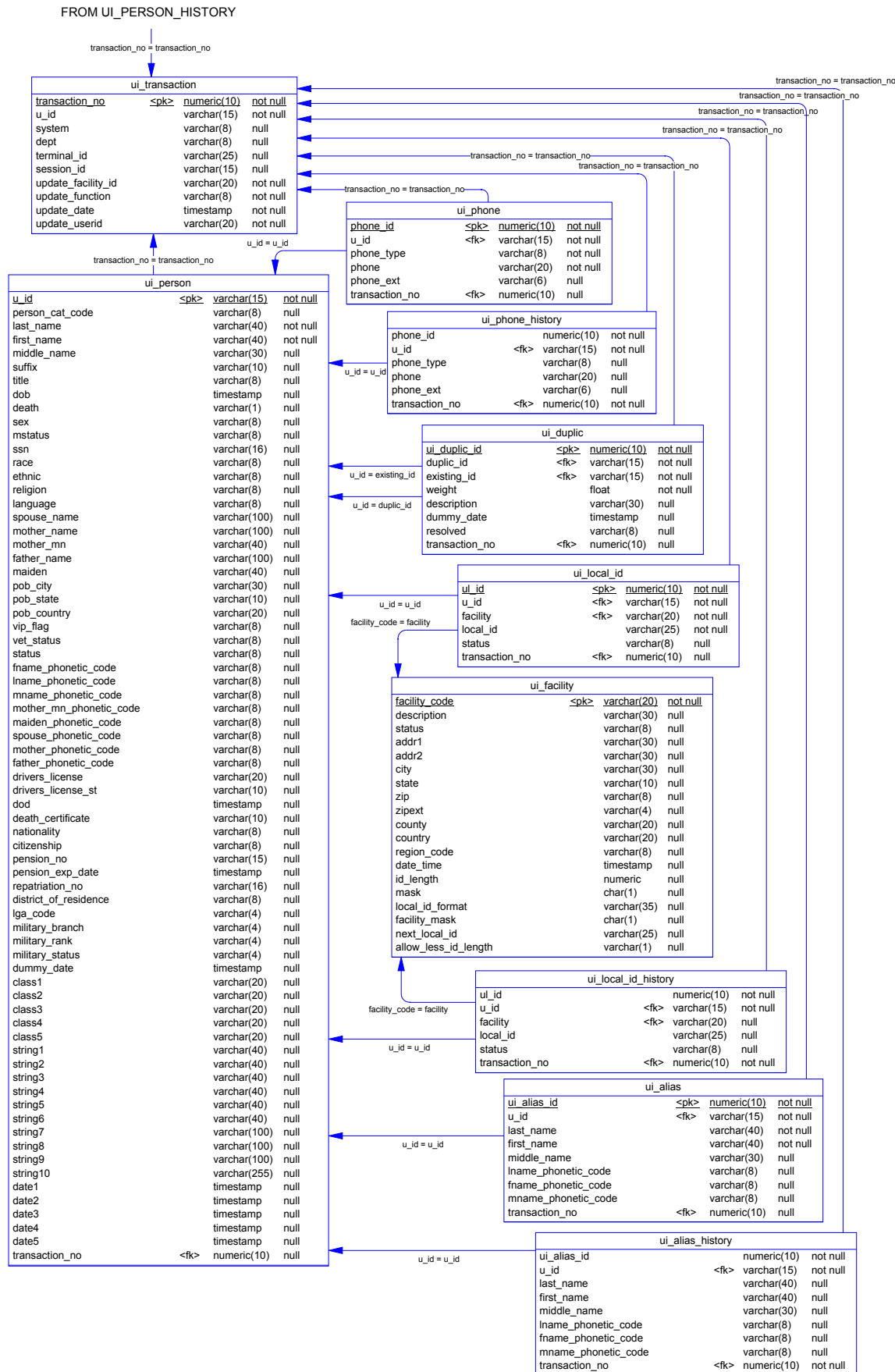
ui_msg_detail			
<u>ui_msg_detail_id</u>	<pk>	numeric(20)	not null
ui_msg_header_id	<fk>	numeric(20)	null
msg		varchar(255)	not null

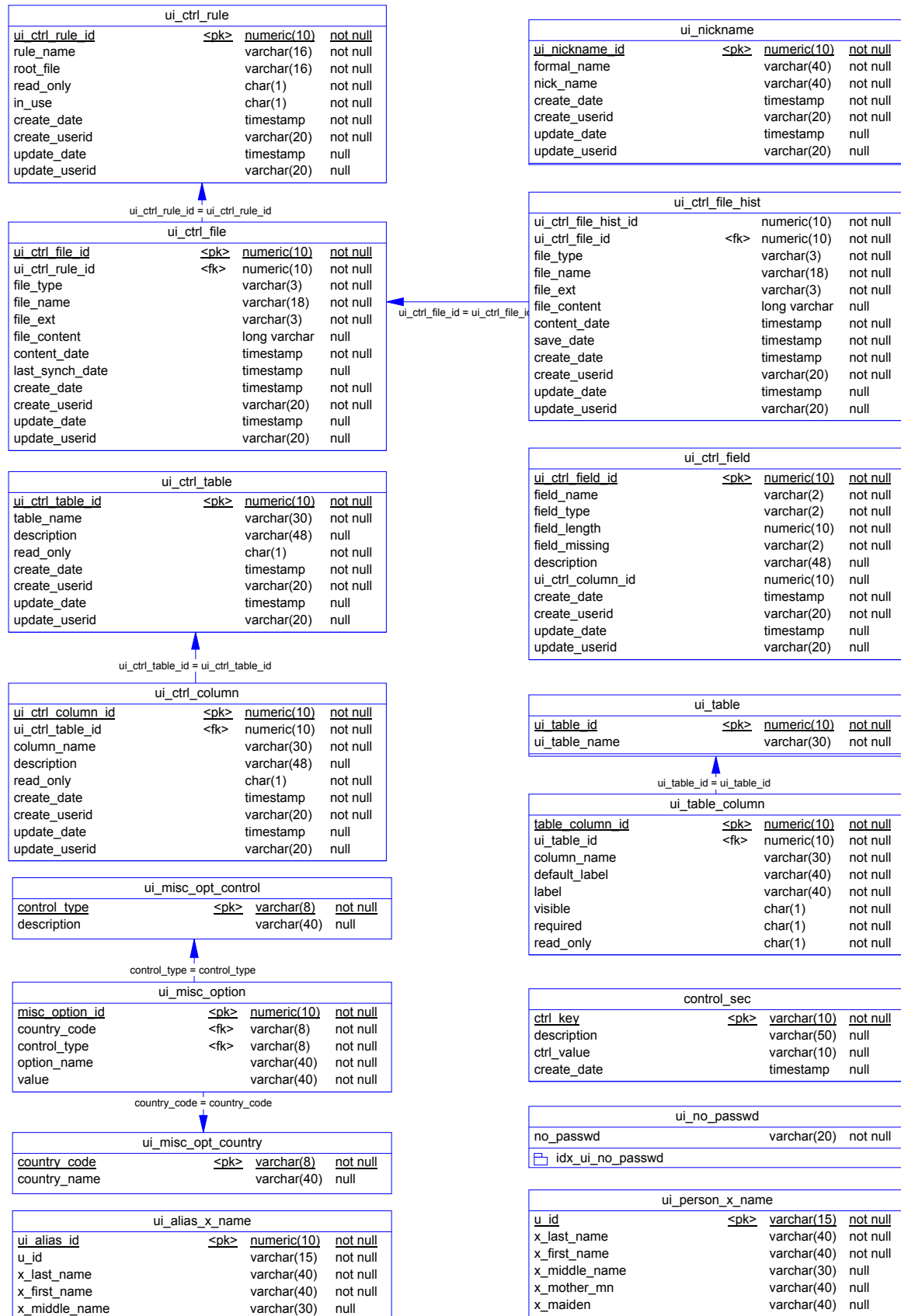
ui_person_history			
<u>ui_person_history_id</u>	<pk>	numeric(10)	not null
u_id		varchar(15)	not null
person_cat_code		varchar(8)	null
last_name		varchar(40)	null
first_name		varchar(40)	null
middle_name		varchar(30)	null
suffix		varchar(10)	null
title		varchar(8)	null
dob		timestamp	null
death		varchar(1)	null
sex		varchar(8)	null
mstatus		varchar(8)	null
ssn		varchar(16)	null
race		varchar(8)	null
ethnic		varchar(8)	null
religion		varchar(8)	null
language		varchar(8)	null
spouse_name		varchar(100)	null
mother_name		varchar(100)	null
mother_mn		varchar(40)	null
father_name		varchar(100)	null
maiden		varchar(40)	null
pob_city		varchar(30)	null
pob_state		varchar(10)	null
pob_country		varchar(20)	null
vip_flag		varchar(8)	null
vet_status		varchar(8)	null
status		varchar(8)	null
fname_phonetic_code		varchar(8)	null
lname_phonetic_code		varchar(8)	null
mname_phonetic_code		varchar(8)	null
mother_mn_phonetic_code		varchar(8)	null
maiden_phonetic_code		varchar(8)	null
spouse_phonetic_code		varchar(8)	null
mother_phonetic_code		varchar(8)	null
father_phonetic_code		varchar(8)	null
drivers_license		varchar(20)	null
drivers_license_st		varchar(10)	null
dod		timestamp	null
death_certificate		varchar(10)	null
nationality		varchar(8)	null
citizenship		varchar(8)	null
pension_no		varchar(15)	null
pension_exp_date		timestamp	null
repatriation_no		varchar(16)	null
district_of_residence		varchar(8)	null
lga_code		varchar(4)	null
military_branch		varchar(4)	null
military_rank		varchar(4)	null
military_status		varchar(4)	null
dummy_date		timestamp	null
class1		varchar(20)	null
class2		varchar(20)	null
class3		varchar(20)	null
class4		varchar(20)	null
class5		varchar(20)	null
string1		varchar(40)	null
string2		varchar(40)	null
string3		varchar(40)	null
string4		varchar(40)	null
string5		varchar(40)	null
string6		varchar(40)	null
string7		varchar(100)	null
string8		varchar(100)	null
string9		varchar(100)	null
string10		varchar(255)	null
date1		timestamp	null
date2		timestamp	null
date3		timestamp	null
date4		timestamp	null
date5		timestamp	null
transaction_no	<fk>	numeric(10)	not null

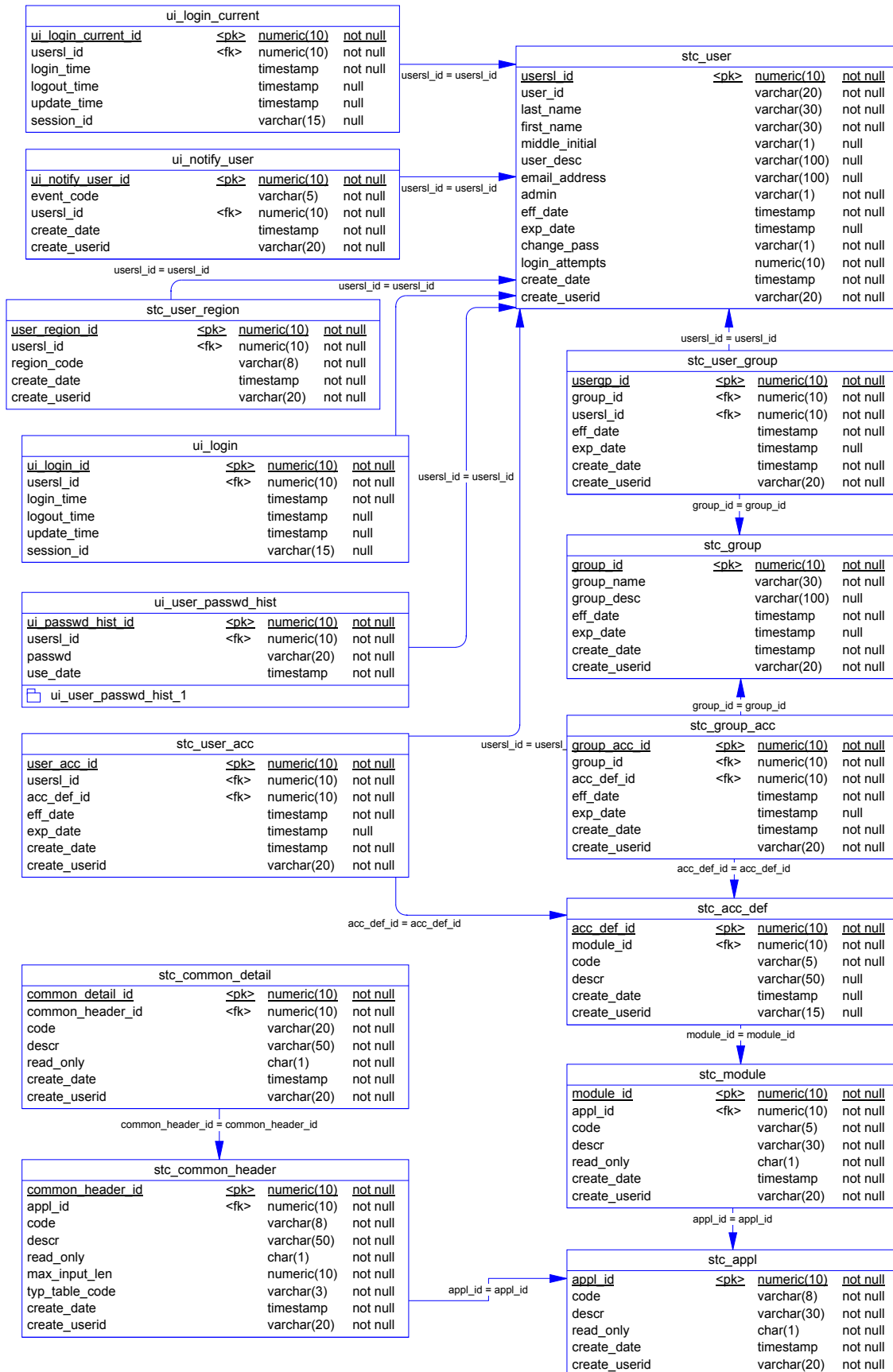
transaction_no = transaction_no

TO UI_TRANSACTION









Installing the GUI

About this Chapter

Overview

This chapter presents the background information and the step-by-step instructions you need to install the GUI for e*Index 4.5.2. It also includes information on using the electronic documentation for e*Index.

The following diagram illustrates the contents of each major topic in this chapter. For the page numbers on which specific topics appear, see the next page of this chapter.



Learn about the GUI files and the e*Index Electronic Library



Learn how to install the GUI and publications, and to make any required modifications to the GUI files

What's Inside

This chapter provides background information and instructions related to the topics listed below.

Learning About the GUI and Publications	4-3
Installing the GUI and Publications	4-5
▶ Step 1: Install the Database Client Software	4-5
▶ Step 2: Install the GUI	4-5
▶ Step 3: Copy the Publications	4-9
▶ Step 4: Modify tnsnames.ora (Oracle only).....	4-10
▶ Step 5: Modify sql.ini (Sybase only)	4-11
▶ Step 6: Define the ODBC Data Source (SQL Server only)	4-12
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▶ Step 8: Register the Online Help Support Files.....	4-14
▶ Step 9: Reboot the Computer	4-15

Learning About the GUI and Publications

Overview

This section of the chapter provides background information about installing the e*Index GUI and the online publications on the Quality Workstation.

What are the System Requirements?

In order to successfully install and use the e*Index GUI, the hardware and software items listed below are required. Be sure your workstation meets these requirements before proceeding.

■ Client Hardware

- ☞ Windows 2000 SP2, Windows NT 4.0 SP4 or higher, Windows 95, or Windows 98
- ☞ Pentium 90 or higher
- ☞ 32MB memory
- ☞ 30MB disk space
- ☞ VGA or higher
- ☞ NIC cards
- ☞ Valid TCP/IP addresses
- ☞ Network connections
- ☞ CD-ROM drive

■ Client Software

- ☞ Database client software
 - Oracle 8.1.7 Client (including Oracle 8.1.7 SQL *Net and Oracle 8.1.7 SQL Plus)
 - Sybase 11.9 or 12.0 Client
 - Microsoft SQL Server 7.0 (client files only)
- ☞ Internet Explorer 3.01 or higher (for online help)
- ☞ e*Index 4.5.2

What is the Quality Workstation?

The e*Index Quality Workstation is the client machine on which you install the e*Index GUI. From this workstation, you can add, delete, modify, and monitor the data in your e*Index database. On the Quality Workstation, you can merge and unmerge member records, search for potential duplicates in the database, compare records, update local ID and alias information, create comments, and so on. You can also print reports and print the current active window for future reference.

How Do I View the Publications?

Once you copy the e*Index electronic library to your workstation, you can view the documents online using Adobe® Acrobat® Reader. You can also print the files to any postscript printer. If you do not have Acrobat Reader installed on your Workstation, you can install it from the Internet at <http://www.adobe.com>. For more information on the e*Index electronic library, read the **Readme.wri** file included with your publications.

The electronic library includes links between documents, a navigational document named **Welcome.pdf**, an index that allows you to search among all publications, and a feedback form for you to provide us with your comments. The library requires an additional 6MB of disk space.

Installing the GUI and Publications

Overview

To install the e*Index GUI on your client workstation, you must complete the following steps:

- Step 1: Install the Database Client Software
- Step 2: Install the GUI
- Step 3: Copy the Publications
- Step 4: Modify **tnsnames.ora** (Oracle only)
- Step 5: Modify **sql.ini** (Sybase only)
- Step 6: Define the ODBC Data Source (SQL Server only)
- Step 7: Modify **stc_ua.ini**
- Step 8: Register the Online Help Support Files
- Step 9: Reboot the Computer (Windows 95 and 98 only)

Step 1: Install the Database Client Software

If you have not done so already, you need to install the client software for the database platform you are using on the e*Index client workstation. For an Oracle database, you need to install Oracle Client 8.1.7, and make sure you install the network administration and application development tools. For a Sybase database, you need to install Sybase 11.9 or 12.0 Client. For a SQL Server database, you need to install Microsoft SQL Server 7.0 (only client files are required). For more information about installing the database client software, see the appropriate Oracle, Sybase, or Microsoft SQL Server documentation.

Step 2: Install the GUI

Installing the GUI is very similar to the process you followed to install the e*Gate backend and the database structure files. If you installed the GUI files at the time you installed your e*Index schema files, you can skip to "Step 3: Copy the Publications."

▶ To install the GUI files

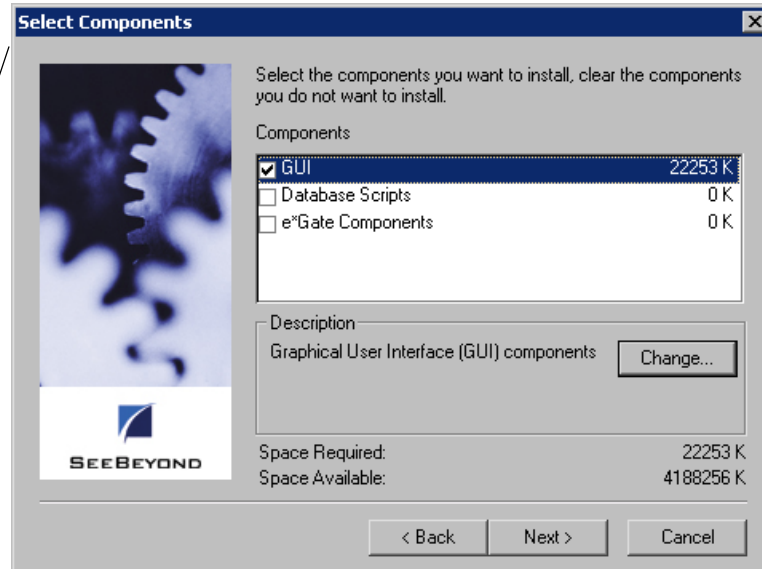
Before you begin:

- ✓ Make sure that your workstation meets the requirements listed on page 3 of this chapter

✓ Make sure you have the database client software installed

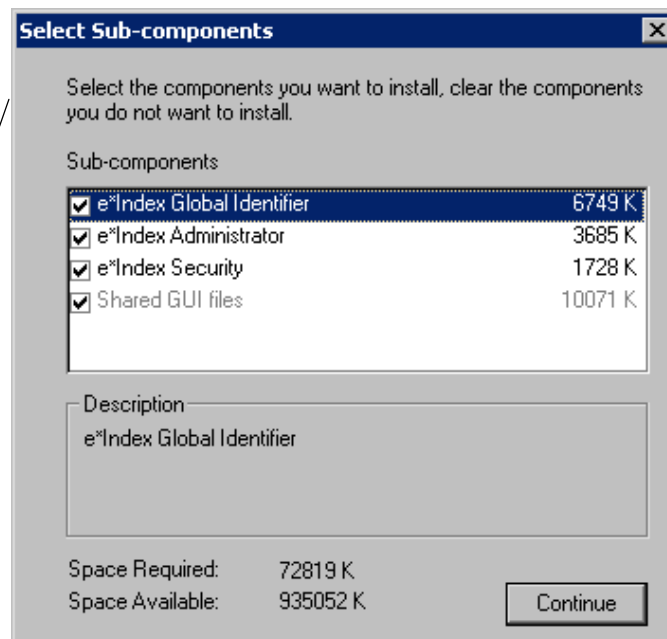
- 1 Follow steps 1 through 7 under “Step 6: Install the e*Index Schema Files” in Chapter 2, “Installing the e*Index Schema Files.” The Select Components window should now be visible.

Use the Select Components window to specify the components you want to install



- 2 On the Select Components window, select **GUI**.
- 3 To verify which GUI components are being installed, highlight **GUI**, and then click **Change**. The Select Sub-components window appears.

You can select which GUI files to install from the Select Sub-components window





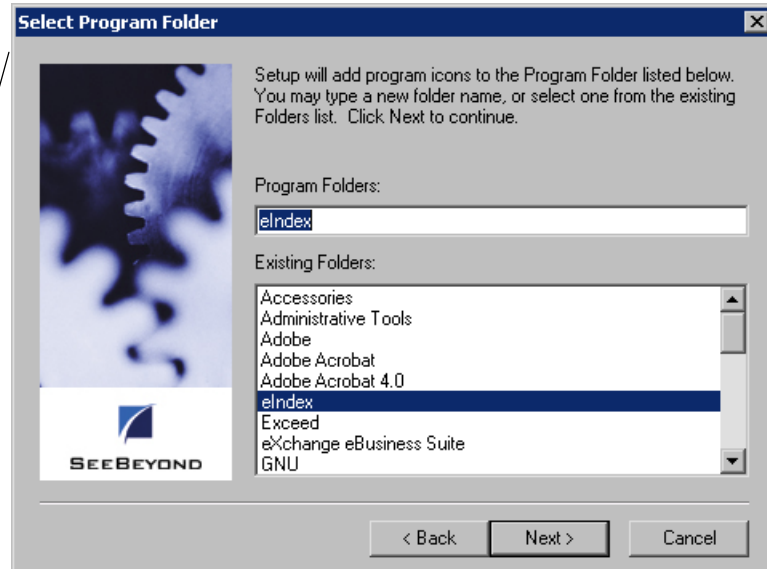
- 4 Select the subcomponents you want to install (e*Index Global Identifier, e*Index Administrator, or e*Index Security).

*Note: If you are installing e*Index on a non-administrator workstation, you should only select e*Index Global Identifier. The Share GUI Component files are installed for all subcomponents.*



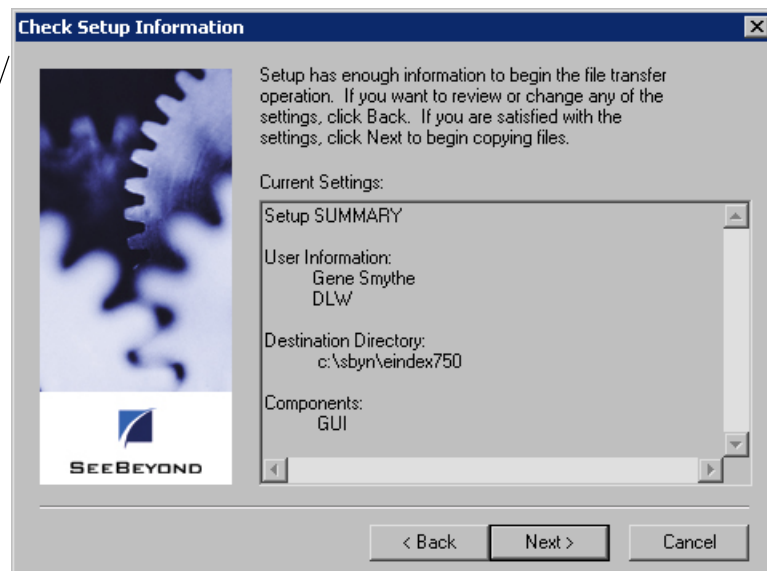
- 5 On the Select Components window, click **Next**. The Select Program Folder window appears.

Select a folder for the program icons on the Select Program Folder window



- 6 Specify the folder into which you want to install the program icons or accept the default folder, and then click **Next**. The Check Setup Information window appears.

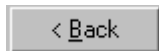
Verify the installation information on the Check Setup Information window



- 7 Verify the information you specified, and do one of the following:

*To change any of the options you selected, click **Back**, and make the necessary changes.*

*To continue with the installation, click **Next**. When the GUI files are installed, the Setup Complete window appears.*

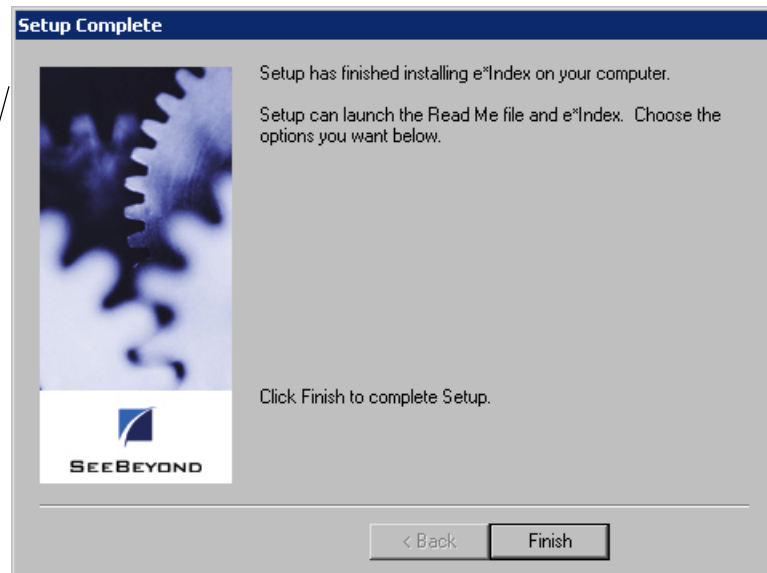


Back button



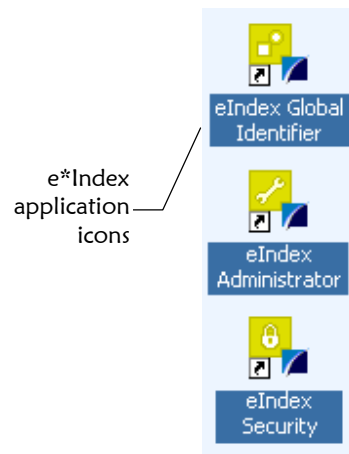
Next button

When the Setup Complete window appears, your installation is finished



Finish button

- 8 Click **Finish** to conclude the installation process and return to the Windows desktop.
- 9 You can view the e*Index application icons on the Windows desktop.



- 10 Continue to "Step 3: Copy the Publications."

Step 3: Copy the Publications

The electronic documentation files for e*Index are located on the installation CD-ROM in the folder `\docs`. Copy the `\docs` folder into the e*Index home directory on your client workstations. The following is a list of documents included in the electronic library:

- **eI_installation_452.pdf**
The *e*Index Global Identifier Installation Guide* explains how to install all components of e*Index, including the GUI, database, and e*Gate schema.
- **eI_reports_452.pdf**
*Working with Reports for e*Index Global Identifier* explains how to modify and run standard reports against the e*Index database.
- **eI_techref_452.pdf**
The *e*Index Global Identifier Technical Reference* is designed to assist e*Gate programmers in writing Monk scripts for the e*Ways for e*Index.
- **eI_upgrade_452.pdf**
The *e*Index Global Identifier Upgrade Guide* explains how to upgrade all components of e*Index from 4.1.2 or later to version 4.5.2.
- **eI_upgrade_411to452.pdf**
The *e*Index 4.1.1 to 4.5.2 Upgrade Guide* explains how to upgrade all components of e*Index from version 4.1.1 to version 4.5.2.
- **eI_userguide_452.pdf**
The *e*Index Global Identifier User's Guide* explains how to use the e*Index GUI.
- **eIA_userguide_452.pdf**
The *e*Index Administrator User's Guide* explains how to use the e*Index Administrator GUI.
- **eIS_userguide_452.pdf**
The *e*Index Security User's Guide* explains how to set up and maintain security for the e*Index applications.
- **feedback_form.pdf**
Use this form to provide any comments or suggestions for improving the documentation provided for e*Index.
- **init_load_452.pdf**
The *e*Index Initial Load User's Guide* describes how to install, modify, and run the schemas you use to load legacy data into the e*Index database.
- **Readme.wri**
This document provides information about the electronic library, such as using the cross-referencing index, search capabilities, and so on.

- **rel_notes_452.pdf**
This document provides information about the differences between e*Index 4.5.1 and 4.5.2.
- **rel_notes_411to452.pdf**
This document provides information about the differences between e*Index 4.1.1 and 4.5.2.
- **Welcome_452.pdf**
The Welcome Document lists all publications available in PDF format, and provides links to each document file. Each file also links back to the Welcome Document.
- **UI_index.pdx**
This is the index file that cross-references all PDF files in the electronic library, allowing you to search for information across documents.
- **UI_index (folder)**
This folder provides the information required for the cross-referencing index to function.

When you have finished copying the publications, do one of the following:

*If you are using an Oracle database, continue to "Step 4: Modify **tnsnames.ora**".*

*If you are using a Sybase database, continue to "Step 5: Modify **sql.ini**".*

If you are using a Microsoft SQL Server database, continue to "Step 6: Define the ODBC Data Source".

Step 4: Modify **tnsnames.ora** (Oracle only)

If your database runs on an Oracle platform, you need to modify the **tnsnames.ora** file in the Oracle client environment to make sure it lists the e*Index database. This file points the Oracle client to the appropriate databases.

***Note:** If you ran the database installation file **create2.bat** from your Quality Workstation, you may have already completed this step. Verify the information in **tnsnames.ora** to be sure.*

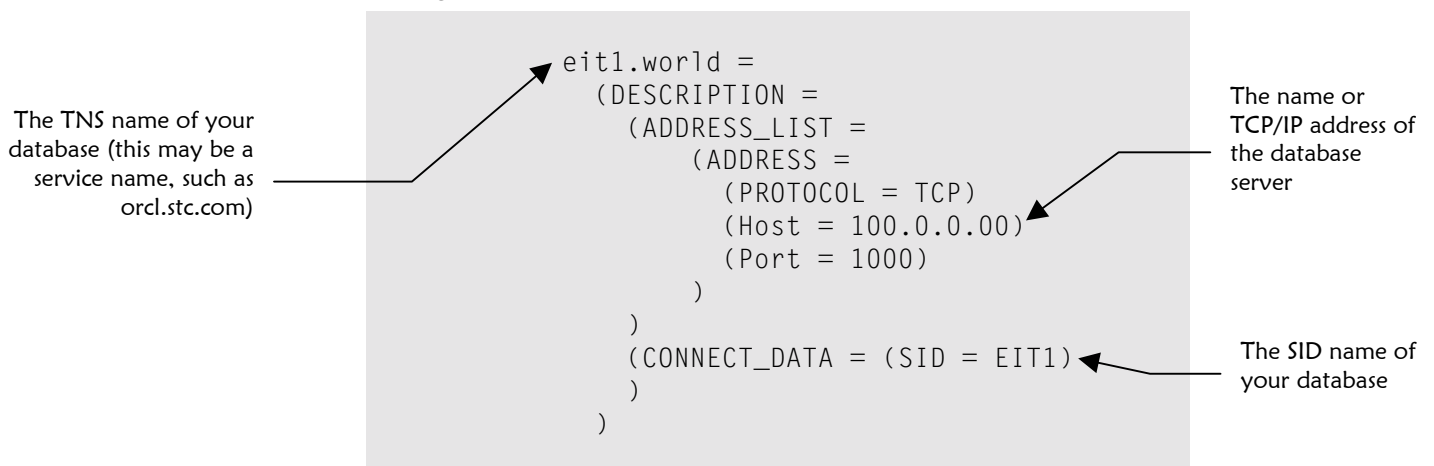
► To modify **tnsnames.ora**

Before you begin:

- ✓ Obtain information about the e*Index database, such as the database name, server address, and so on
- ✓ Complete "Step 3: Copy the Publications"

- 1 Navigate to your Oracle home directory and then to `\net80\admin` or `network\admin`, depending on your Oracle environment.
- 2 Make a backup copy of the file `tnsnames.ora`, and then open `tnsnames.ora` in any text editor, such as WordPad or Notepad.
- 3 Create a new stanza for the database, including the following information:
 - The TNS name of the database
 - The connection protocol used to connect to the database
 - The database host name or address
 - The port number to connect to
 - The SID name for your database

Following is a sample stanza from `tnsnames.ora`. Your file may vary from this structure depending on how your Oracle networking is configured.



Note: For complete instructions on how to configure Oracle networking for your environment, refer to the appropriate Oracle user documentation.

- 4 Continue to "Step 7: Modify `stc_ua.ini`."

Step 5: Modify `sql.ini` (Sybase only)

If your database runs on a Sybase platform, you need to modify the `sql.ini` file in the Sybase environment to make sure it lists the e*Index database server. This file points the Sybase client to the database servers.

Note: If you ran the database installation file `create2.bat` from your Quality Workstation, you may have already completed this step. Verify the information in `sql.ini` to be sure.

► To modify `sql.ini`

Before you begin:

- ✓ Complete "Step 3: Copy the Publications"
- 1 Navigate to the Sybase home directory and then to `\ini`.
- 2 Make a backup copy of the file `sql.ini`.
- 3 Open `sql.ini` in any text editor.
- 4 In `sql.ini`, create a stanza describing the server on which the database resides. The sample on the following page provides an example of how the stanza may appear for the Adaptive Server named "challenger" using a TCP/IP connection. For more information about configuring this file, refer to your Sybase user documentation.

```
[challenger]
master=TCP,challenger,4100
query=TCP,challenger,4100
```

- 5 Continue to "Step 7: Modify `stc_ua.ini`".

Step 6: Define the ODBC Data Source (SQL Server only)

If your database runs on Microsoft SQL Server, you need to define an ODBC data source for the e*Index database. The data source specifies the driver used to connect to the database and additional information about the database.

► To define the ODBC Data Source

Before you begin:

- ✓ Obtain information about the e*Index database, such as the database name, server address, and so on
- ✓ Complete "Step 3: Copy the Publications"
- 1 On the Windows Start menu, select **Control Panel**, and then select **Data Sources (ODBC)**.
- 2 On the ODBC Data Source Administrator window, click **Add**.
- 3 On the Create New Data Source window, select **SQL Server** and then click **Finish**.

- 4 On the "Create a New Data Source to SQL Server" window, enter the name of the database, a brief description (optional), and the name of the server on which the database resides.
- 5 Click **OK**. The ODBC Microsoft SQL Server Setup window appears.
- 6 On the ODBC Microsoft SQL Server Setup window, verify the configuration of the data source, and then click **OK**. The ODBC Data Source Administrator window reappears.

Note: You can change the configuration information by selecting the data source name and then clicking **Configure...** on the ODBC Data Source Administrator window.

- 7 Continue to "Step 7: Modify **stc_ua.ini**."

Step 7: Modify **stc_ua.ini**

Before your e*Index GUI can connect to the database, you need to make sure that the e*Index initialization file contains a database definition for each database to which you need to connect through the e*Index GUIs.

► To modify **stc_ua.ini**

Before you begin:

- ✓ Obtain information about the e*Index database, such as the database name, server address, and so on
- ✓ Complete step 5, 6, or 7

- 1 Navigate to the e*Index GUI home directory.
- 2 In the **client** directory, make a backup copy of the file **stc_ua.ini**, and then open **stc_ua.ini** any text editor, such as Notepad or WordPad.
- 3 Make the following modifications:
 - In the **Database** stanza:
 - In the **DBMS** field, enter the appropriate database platform. For Oracle, the DBMS is **084 ORACLE8i**; for Sybase 12 the DBMS is **SYC SYBASE12**; and for SQL Server the DBMS is **MSS ODBC**.
 - In the **Database** field, enter the database name. For SQL Server, this is the name of the ODBC data source for the database. You can leave this field blank for an Oracle database.
 - In the **ServerName** field, enter the server name for the database. For Oracle, this is the TNS service name (found in the file

tnsnames.ora). For Sybase, this is the name of the adaptive server. For SQL Server, this is the name of the computer on which the database resides.

- In the **DisplayName** field, enter the name of the database as you want it to appear on the e*Index windows.

Notes:

- *If you are using more than one test database, you can add new database stanzas to **stc_ua.ini** with the additional database information. The database numbers in the stanza headings must be sequential; for each stanza you add, make sure you increment the database number by one.*
 - *You do not need to enter any information in these fields: **LogID**, **LogPass**, **UserID**, **DBPass**, **Lock**, **DbParm**. These fields are not currently used for e*Index initialization.*
-

- In the **STC** section:
 - In the **FacilityID** field, enter a valid system code. This field cannot be left blank. You can leave the default value (SBYN), however, for reporting purposes you may want to change the value to the system code of a system in your enterprise.
 - In the **DBIndex** field, enter the database number of the database you want as the default database on the login window. The name of the database you specify automatically appears on the login window when you launch an e*Index application. For example, to specify the database with the stanza heading **Database4** as the default database, enter **4** in this field.

*Note: The SmartCard section of **stc_ua.ini** only needs to be modified if you have implemented the SmartCard functionality of e*Index. Your SeeBeyond representative should perform the modifications.*

- 4 Continue to "Step 8: Register Online Help Support Files."

Step 8: Register Online Help Support Files

Before you can use the online help system provided with the e*Index GUIs, you need to register the supporting help file.

▶ To register d2hPopup.ocx

Before you begin:

- ✓ Open an MS-DOS prompt from the start menu
- ✓ Complete "Step 7: Modify **stc_ua.ini**"

- 1 In the MS-DOS prompt, navigate to your e*Index home directory, and then to the **client** subdirectory.
- 2 At the prompt, type **regsvr32 d2hPopup.ocx**.
- 3 Click **OK** on the confirmation dialog that appears.

*Note: If you do not register this file, you will be prompted to download the file from a website the first time you open an e*Index online help file. If you choose to download from the website, this file is registered automatically. Once this file is registered, you will not receive the prompt when you open the help files.*

- 4 Continue to "Step 9: Reboot the Computer."

Step 9: Reboot the Computer

When you install the e*Index GUI, an environment variable, VTICFG, is created. This variable tells the GUI where the Vality rule set files are located, and is set to "." (the current working directory). In Windows 95 and 98, the installation adds this information as the last line in **autoexec.bat**, and creates a backup copy of the original **autoexec.bat** (named **autoexec.bak**) in case you need to revert to the previous version. In order for this change to take effect on a Windows 95 or 98 computer, you need to reboot the machine.

