

SeeBeyond™ eBusiness Integration Suite

e*Insight Business Process Manager Installation Guide

Release 4.5.2



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Contents

Chapter 1

Introduction	9
Document Purpose and Scope	9
Intended Audience	9
Writing Conventions	10
Supporting Documents	11
SeeBeyond Web Site	11

Chapter 2

Introduction to the SeeBeyond eBI Suite	12
SeeBeyond eBusiness Integration Suite	12
SeeBeyond eBusiness Integration Suite Components	13
eBusiness Integration Solutions Components	14
e*Gate Integrator Components	14

Chapter 3

Installation Overview	16
e*Insight Installation Summary	16
Upgrade Scenario	16
System Requirements	17
Hardware Requirements	17
Software Requirements	17
Supported Platforms	19
International Feature Support	20
Installation at a Glance	21

Chapter 4

Installing the e*Insight GUI	22
Overview	22

Using the InstallShield Wizard	22
Installing the e*Insight GUI	22

Chapter 5

Installing the e*Gate Schema for e*Insight	25
Overview	25
System Requirements	25
Installing the Schema	26
Installing the e*Gate Schema for e*Insight	26

Chapter 6

Additional Installation Requirements	28
Overview	28
Installing the Java Runtime Environment	28
Installing the Sample Application	29
Installing the Sample Application on Windows NT or Windows 2000	30
Installing the SOAP Add-on	31
Installing the Microsoft Data Access Components	32

Chapter 7

Creating the e*Insight Database Schema – Oracle	33
Overview	33
System Requirements	33
Creating an Oracle Schema via InstallShield Wizard	34
Installing the Schema	34
Installing the Database Schema from Windows NT or Windows 2000	34
Modifying the init.ora File for the e*Insight Database	36
Creating an Oracle Schema Manually	37
Copy the Installation Files to the e*Insight Root Directory	37
Modifying the ex_defns.sql Script	37
Running the ex_install.sql Script	38
Modifying the init.ora File for the e*Insight Database	39
Using the e*Insight Engine with Oracle	39
Using the e*Insight GUI with Oracle	40
Updating the GUI Configuration	40
Install Latest Drivers	41
Create the ODBC Connection	41

Uninstalling the e*Insight Database Schema	42
--	----

Chapter 8

Creating the e*Insight Database—SQL Server	44
Overview	44
System Requirements	44
Creating a SQL Server Database via InstallShield Wizard	45
Installing the Database	45
Installing the Database on Windows NT or Windows 2000	45
Creating a SQL Server Database Manually	47
Copy the Installation Files to the e*Insight Root Directory	47
Modify SQL Statements	48
Running the ss_ex_install.sql Script	48
Create the SQL Server ODBC Connection	48
Uninstalling the SQL Server Database	50

Chapter 9

Creating the e*Insight Database—Sybase	51
Overview	51
System Requirements	51
Configuration Changes to the Sybase Server	51
Creating a Sybase Database via InstallShield Wizard	52
Installing the Database	52
Installing the Database on Windows NT or Windows 2000	53
Configuring the Database to Support Metadata	54
Creating a Sybase Database Manually	54
Copy the Installation Files to the e*Insight Root Directory	55
Modify SQL Statements	55
Running the syb_ex_install.cmd Script	56
Configuring the Database to Support Metadata	56
Create the Sybase ODBC Connection	56
Configuring Sybase jConnect for JDBC	57
Uninstalling the Sybase Database	58

Appendix A

Updating the e*Gate Schema for e*Insight from 4.1.2	59
After Upgrading	59

Updating Data Types	60
Creating a New Configuration File for the eX_eBPM Engine (Optional)	60

Appendix B

Updating the e*Gate Schema for e*Insight from 4.5	61
Creating a New Configuration File for the eX_eBPM Engine (Optional)	61

Appendix C

Upgrading the e*Insight Database Schemas to Version 4.5.2	63
---	----

Upgrading the Database Schema	63
-------------------------------	----

Upgrading an Oracle Schema	63
----------------------------	----

Upgrading an Oracle Schema using the InstallShield Wizard	63
---	----

Upgrading an Oracle Schema Manually	65
-------------------------------------	----

Upgrading an Oracle Schema Manually from 4.1.2 to 4.5.2	65
---	----

Step 1: Copy the Installation Files to the e*Insight Root Directory	66
---	----

Step 2: Modify ex_defs.sql	66
----------------------------	----

Step 3: Run eInsightUpgrade412_45	67
-----------------------------------	----

Step 4: Modify upgrader.cmd and Upgrader.properties	67
---	----

Step 5: Run upgrader.cmd	67
--------------------------	----

Step 6: Run eInsightUpgrade45_451	68
-----------------------------------	----

Step 7: Run eInsightUpgrade451_452	68
------------------------------------	----

Upgrading an Oracle Schema Manually from 4.5 to 4.5.2	68
---	----

Step 1: Copy the Installation Files to the e*Insight Root Directory	68
---	----

Step 2: Modify ex_defs.sql	68
----------------------------	----

Step 3: Run eInsightUpgrade45_451.sql	69
---------------------------------------	----

Step 3: Run eInsightUpgrade451_452.sql	69
--	----

Upgrading a SQL Server Schema	70
-------------------------------	----

Upgrading a SQL Server Schema Using the InstallShield Wizard	70
--	----

Upgrading a SQL Server Schema manually	71
--	----

Upgrading a SQL Server Schema Manually from 4.1.2 to 4.5.2	71
--	----

Step1: Copy the Installation Files to the e*Insight Root Directory	71
--	----

Step 2: Modify ss_ex_defs.cmd	72
-------------------------------	----

Step 3: Run eInsightUpgrade412_45.cmd	72
---------------------------------------	----

Step 4: Modify upgrader.cmd and Upgrader.properties	73
---	----

Step 5: Run upgrader.cmd	73
--------------------------	----

Step 6: Run eInsightUpgrade45_451	73
-----------------------------------	----

Step 7: Run eInsightUpgrade451_452	74
------------------------------------	----

Upgrading a SQL Server Schema Manually from 4.5 to 4.5.2	74
--	----

Step1: Copy the Installation Files to the e*Insight Root Directory	74
--	----

Step 2: Modify ss_ex_defs.cmd	74
-------------------------------	----

Step 3: Run eInsightUpgrade45_451	75
-----------------------------------	----

Step 4: Run eInsightUpgrade451_452	75
------------------------------------	----

Upgrading a Sybase Schema	75
---------------------------	----

Upgrading a Sybase using the InstallShield Wizard	76
---	----

Upgrading a Sybase Schema Manually from 4.5 to 4.5.2	77
--	----

Upgrading a Sybase Schema Manually from 4.5 to 4.5.2	77
Step 1: Copy the Installation Files to the e*Insight Root Directory	77
Step 2: Modify sy_ex_defs.cmd	77
Step 3: Run eInsightUpgrade45_451.cmd	78
Step 4: Run eInsightUpgrade451_452.cmd	78
Upgrading a Sybase Schema Manually from 4.5.1 to 4.5.2	78
Step 1: Copy the Installation Files to the e*Insight Root Directory	79
Step 2: Modify sy_ex_defs.cmd	79
Step 3: Run eInsightUpgrade45_451.cmd	79

Appendix D

Updating the e*Insight e*Gate Schemas from 4.1.1 to 4.1.2 81

Update 4.1.1 e*Insight e*Gate Schemas	81
Remove Old e*Gate Files:	81
Rename Old e*Gate Files	82
Review the Log File	82
After the e*Gate Schema Upgrade	82
stcschemutil.exe Related Messages	83

Appendix E

Upgrading the e*Xchange Database Schemas from Version 4.1.1 to 4.1.2 84

Installing the Upgrade	84
Extract the Upgrade Files	84
Edit the Upgrade Files/Script	85
Update the Tablespace Names	87
Run the Update Script	89
Update Configuration Files	89
Using Business Processes Created in 4.1.1 in 4.1.2	90
Installing the Necessary Oracle File	90
Migrating Business Processes Between Versions	90
Uninstalling the Existing e*Xchange Oracle Database	91
Copy the Uninstall Files to the e*Xchange Root Directory	92
Modify SQL Statements	92
Running the ex_uninstall.sql Script	93

Appendix F

Upgrading the e*Xchange Database Schemas from Version 4.1.0 to 4.1.1 95

Installing the Upgrade	95
Extract the Upgrade Files	95
Edit the Upgrade Files/Script	95

Run the Update Script

97

Introduction

This e*Insight Business Process Manager Installation Guide provides instructions for installing the e*Insight Business Process Manager component of the SeeBeyond eBusiness Integration Suite.

This Installation Guide covers only the installation of the e*Insight Business Manager component.

For information on installing e*Gate™, refer to the *e*Gate Integrator Installation Guide*.

For information on installing e*Xchange, refer to the *e*Xchange Partner Manager Installation Guide*.

1.1 Document Purpose and Scope

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

- Installation of e*Insight Business Process Manager
- Upgrading e*Insight Business Process Manager from Version 4.1.2 to 4.5.2.

1.2 Intended Audience

The reader of this guide is presumed to be a developer or system administrator with responsibility for installing e*Insight. He or she should have experience of Windows NT and UNIX operations and administration, and should be thoroughly familiar with Windows-style GUI operations.

To install the e*Insight GUI and e*Gate schema for e*Insight, the reader should have an understanding of e*Gate Integrator, including the location of the Registry, a Participating Host, and the e*Gate Enterprise Manager GUI. To create the database schema, the reader should have knowledge of database administration for Oracle, SQL Server, or Sybase.

1.3 Writing Conventions

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

Hypertext Links

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

For information on these and related topics, see **“Supporting Documents” on page 11**.

Command Line

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

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

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

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

Code and Samples

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

```
Configuration for BOB_Promotion
```

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

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

Notes and Cautions

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

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

User Input

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

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

File Names and Paths

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

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

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

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

Parameter, Function, and Command Names

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

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

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

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

1.4 Supporting Documents

The following SeeBeyond documents provide additional information about the SeeBeyond eBusiness Integration Suite:

- *SeeBeyond eBusiness Integration Suite Deployment Guide*
- *SeeBeyond eBusiness Integration Suite Primer*
- *e*Insight Business Process Manager User's Guide*
- *e*Xchange Partner Manager User's Guide*
- *e*Insight Business Process Manager Implementation Guide*
- *e*Xchange Partner Manager Implementation Guide*
- *e*Gate Integrator Alert Agent User's Guide*
- *e*Gate Integrator Alert and Log File Reference Guide*
- *Collaboration Services Reference Guide*
- *e*Xchange Partner Manager Installation Guide*
- *Intelligent Queue Transport User's Guide*
- *e*Gate Integrator SNMP Agent User's Guide*
- *System Administration and Operations Guide*
- *e*Gate Integrator User's Guide*
- *Monk Developer's Reference*
- *Standard e*Way Intelligent Adapters User's Guide*

1.5 SeeBeyond Web Site

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

<http://www.SeeBeyond.com>

Introduction to the SeeBeyond eBI Suite

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

2.1 SeeBeyond eBusiness Integration Suite

One of the biggest challenges today in conducting eBusiness is dealing with complex and dynamic partner relationships and coordinating control of the various activities participating in the eBusiness process. Both organizations and their trading partners are faced with the problem of managing disparate component applications and aligning proprietary software requirements. In addition, organizations and their trading partners must agree on data exchange and security standards.

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

- leverage your existing technology and applications
- create an eApplication consisting of component applications that are managed by your organization or your trading partners
- rapidly execute eBusiness strategies
- create and manage virtual organizations across the entire value chain
- rapidly implement industry standard business protocols
- quickly and easily establish new, or update existing, business partners
- automatically secure transmissions sent over the public domain

This suite also provides:

- extensive and flexible back-office connectivity
- powerful data transformation and mapping facilities
- content-based routing
- unparalleled scalability based on a fully distributed architecture

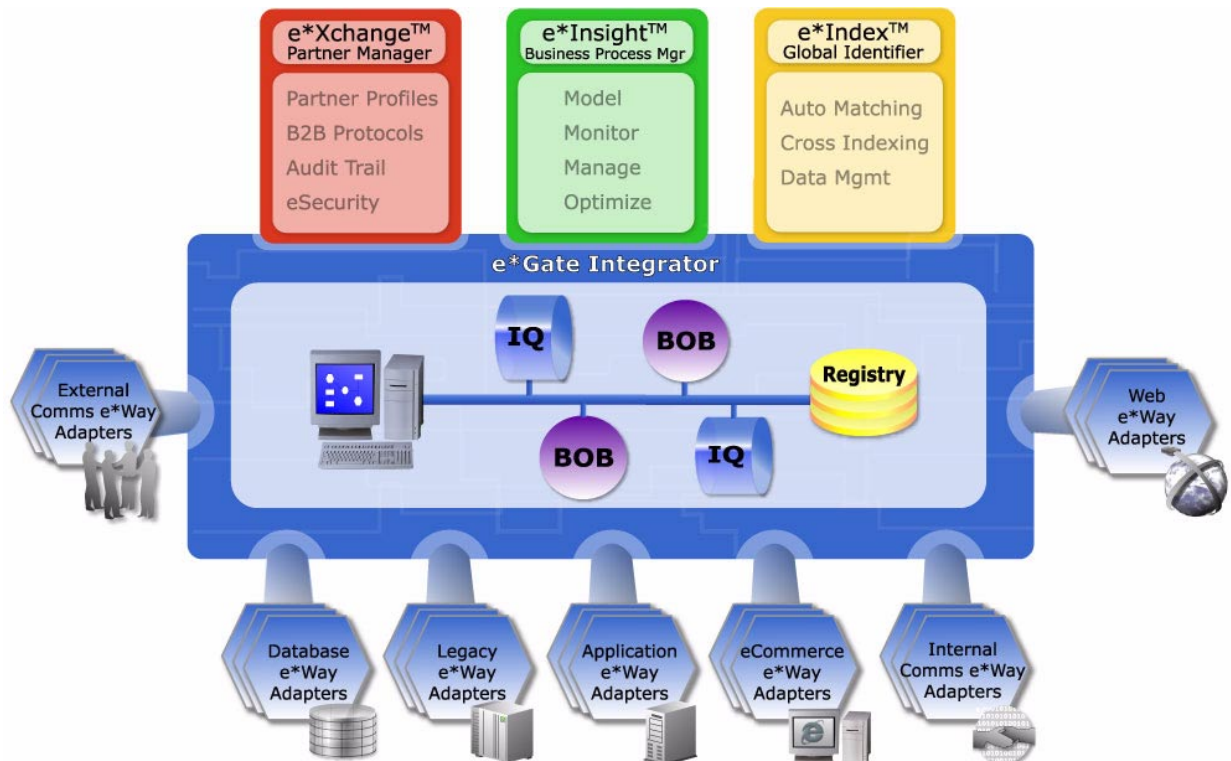
2.1.1 SeeBeyond eBusiness Integration Suite Components

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

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

See Figure 1 for a graphical representation of the SeeBeyond eBusiness Integration Suite and its components. For an additional overview of the components of the SeeBeyond eBusiness Integration Suite, see the *SeeBeyond eBusiness Suite Integration Primer*.

Figure 1 SeeBeyond eBusiness Integration Suite



eBusiness Integration Solutions Components

The eBusiness Integration Solutions include features and functions to facilitate effective business process management, provide eBusiness protocol support, allow effective partner management, and ensure secure eBusiness communications.

e*Insight Business Process Manager

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

e*Xchange Partner Manager

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

eSecurity Manager

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

e*Index Global Identifier

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

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

e*Gate Integrator Components

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

e*Way Intelligent Adapters

e*Way Intelligent Adapters provide specialized application connectivity and also provide support for robust data processing such as business collaborations, transformation logic, and publish/subscribe relationships. e*Way adapters are multi-

threaded to enable high-performance distributed processing capabilities. This multi-threaded processing allows for ultimate deployment flexibility and load balancing.

IQ Intelligent Queues

IQ Intelligent Queues are open queue services for SeeBeyond or third-party queuing technology, that provide robust data transport with guaranteed once-only message delivery.

Business Object Brokers

Business Object Brokers (BOBs) enable routing and load balancing between queues for implementing multi-step business processes.

Installation Overview

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

3.1 e*Insight Installation Summary

This user guide describes how to install the e*Insight components. During the installation process you will install the following components:

- **e*Insight GUI.** This component includes the graphical user interface (GUI) for the e*Insight Business Process Manager.
- **e*Gate Schema for e*Insight.** This includes the e*Gate schema components for e*Insight.
- **e*Insight relational database schema.** Includes all of the files necessary to create the e*Insight database on the database server.

The GUI, back-end and relational database schema portions are installed using the InstallShield® Wizard directly from the CD.

This guide contains separate chapters for installing the GUI and the back end. You can choose to install these components separately or at the same time.

3.2 Upgrade Scenario

Before upgrading to e*Insight 4.5.2, do the following:

- Back up your database.
- Export all models and instance data from the e*Xchange eBusiness Process Manager GUI (Version 4.1.2) or e*Insight Business Process Manager (Version 4.5.x).

The following scenario outlines the steps you should take when upgrading e*Insight from version 4.1.2, 4.5, or 4.5.1 to 4.5.2. You must upgrade e*Gate and e*Insight to the same version.

If you want to upgrade from an earlier version than 4.1.2, refer to [“Updating the e*Insight e*Gate Schemas from 4.1.1 to 4.1.2” on page 81](#) and [“Upgrading the e*Xchange Database Schemas from Version 4.1.1 to 4.1.2” on page 84](#).

Table 1 Upgrading e*Insight to 4.5.2

Install e*Gate version 4.5.1 or above.	See the <i>e*Gate Integrator Installation Guide</i> . Important: If you are using e*Gate version 4.5.1, then you must install e*Gate and ESR 42303 before you install e*Insight.
Install the e*Insight GUI and e*Gate Schema version 4.5.2.	See “Installing the e*Insight GUI” on page 22
Install the e*Gate Schema for e*Insight version 4.5.2.	See “Installing the e*Gate Schema for e*Insight” on page 25 . Then, see either “Updating the e*Gate Schema for e*Insight from 4.1.2” on page 59 or “Updating the e*Gate Schema for e*Insight from 4.5” on page 61 .
Update the JRE as necessary.	See “Additional Installation Requirements” on page 28 .
Upgrade the e*Insight database.	See “Upgrading the e*Insight Database Schemas to Version 4.5.2” on page 63 . Note: The back end (which is installed automatically with the e*Insight GUI) and JRE must be updated before the database.

3.3 System Requirements

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

3.3.1 Hardware Requirements

The e*Insight Business Process Manager GUI must be installed on a Windows NT or Windows 2000 workstation that includes the following minimum requirements:

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

3.3.2 Software Requirements

e*Insight Business Process Manager requires that the following applications and components be installed prior to installing the e*Insight components:

- e*Gate Integrator 4.5.1 or above

- Oracle 8i (Server) (8.1.6 or 8.1.7), SQL Server 7.0 (Server), SQL Server 2000 (Server), or Sybase 11.9 or 12 (Server)
- Java Runtime Environment for Java 1.3

e*Insight Business Process Manager GUI

- Oracle 8i (Client) (8.1.6 or 8.1.7) client, SQL Server 7.0 (Client), SQL Server 2000 (Client), or Sybase 11.9 or 12 (Client)
- ODBC drivers for the database server used to store e*Insight data. The ODBC driver must be installed on the same machine as the e*Insight GUI.
- 1024x768 resolution for your monitor
- For the Import/Export of Business Process Models feature in e*Insight, JRE version 1.3 is required. This feature is only run via the GUI, so JRE 1.3 need only exist on your Windows NT or 2000 machine. JRE 1.3 is installed via InstallShield, and is installed privately in the following folder:

`\eInsight\Jre`

e*Gate Schema for e*Insight

- The e*Gate Schema for e*Insight must be installed from a Windows NT or 2000 machine. The components are committed to the e*Insight schema on the e*Gate Registry Host you specify during the installation process.

e*Gate Integrator 4.5.1 or above

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

- Registry
- Participating Host
- GUI

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

Important: *If you are using e*Insight 4.5.2 with e*Gate 4.5.1, then you must install ESR 42303.*

Oracle

- The e*Insight Oracle database schema must be created in an existing default Oracle 8i (8.1.6 or 8.1.7) instance. For requirements associated with the Oracle instance, see the appropriate Oracle user guides.
- The default disk space for the e*Insight Oracle schema is 250 MB. You should adjust this as necessary, based on the throughput requirements for your enterprise.
- The hard disk requirement for each Oracle 8i product includes 15 MB which is required to install Java Runtime Environment (JRE) and Oracle Universal Installer on the partition in which the operating system is installed.

SQL Server

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

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

Sybase

- For requirements associated with Sybase 11.9 or 12, see the appropriate Sybase user guides.

3.3.3 Supported Platforms

e*Insight Business Process Manager is available for the following platforms:

- Windows 2000, Windows 2000 SP1, and Windows 2000 SP2
- Windows 2000 (Japanese), Windows 2000 SP1 (Japanese), and Windows 2000 SP2 (Japanese)
- Windows 2000 (Korean), Windows 2000 SP1 (Korean), and Windows 2000 SP2 (Korean)
- Windows 2000 (Traditional Chinese), Windows 2000 SP1 (Traditional Chinese), and Windows 2000 SP2 (Traditional Chinese)
- Windows NT 4.0 SP6a
- Windows NT 4.0 SP6a (Japanese)
- Windows NT 4.0 SP6a (Korean)
- Windows NT 4.0 SP6a (Traditional Chinese)
- Solaris 2.6, 7, and 8
- Solaris 2.6, 7, and 8 (Japanese)
- Solaris 8 (Korean)
- Solaris 8 (Traditional Chinese)
- HP-UX 11 and 11i
- HP-UX 11 (Japanese)
- AIX 4.3.3
- Compaq Tru64 UNIX v4.0F and 5.0A

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

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

3.3.4 International Feature Support

The following international features are supported:

- Japanese characters in model names, activity names, attribute names, and links for Oracle
- Korean (Hangul) characters in model names, activity names and attribute names, and links for Oracle
- Chinese traditional characters in model names, activity names and attribute names, and links for Oracle
- Support for single byte characters only for Sybase and SQL Server
- Japanese support for eISchema and eIJSchema.
- Korean support for eISchema and eIJSchema.
- Traditional Chinese support for eIJSchema only.

3.4 Installation at a Glance

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

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

Table 2 Installation at a Glance

Step	Action	Chapter/Section
1	Install e*Gate version 4.5.1 or above.	See the <i>e*Gate Integrator Installation Guide</i> . Important: If you are using e*Gate version 4.5.1, then you must install e*Gate and ESR 42303 before you install e*Insight.
2	Install the e*Insight GUI on one or more machines that have a connection to the database (Windows NT or Windows 2000).	See “Installing the e*Insight GUI” on page 22 .
3	Install the e*Gate Schema for e*Insight from a Windows NT or Windows 2000 machine that has a network connection to the e*Gate Registry Host.	See “Installing the Schema” on page 26 .
4	Install the e*Insight database on a machine that contains an existing (Oracle, SQL Server, or Sybase) database instance (Windows NT, Windows 2000, or UNIX).	See “Creating the e*Insight Database Schema—Oracle” on page 33 , “Creating the e*Insight Database—SQL Server” on page 44 or “Creating the e*Insight Database—Sybase” on page 51 .
5	Install the ODBC driver on the machine that contains the e*Insight GUI (Windows NT or 2000).	See “Using the e*Insight GUI with Oracle” on page 40 , “Create the SQL Server ODBC Connection” on page 48 or “Create the Sybase ODBC Connection” on page 56 .

Installing the e*Insight GUI

This chapter describes the process for installing the e*Insight GUI. You can install the e*Insight GUI at any point in the installation process, since it is not dependent on any other e*Gate or e*Insight component. Each GUI can be installed on any Windows NT or Windows 2000 machine that contains the appropriate software.

Important: *In order to access the database schemas from the e*Insight GUI, you must have a database schema installed and an ODBC connection established for it. See [“Creating the e*Insight Database Schema—Oracle” on page 33](#), [“Creating the e*Insight Database—SQL Server” on page 44](#) or [“Creating the e*Insight Database—Sybase” on page 51](#) for more information.*

4.1 Overview

This chapter provides information on the following items:

- System requirements
- Installing the e*Insight GUI

4.2 Using the InstallShield Wizard

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

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

4.3 Installing the e*Insight GUI

Before you begin:

- You must have Administrator privileges to install the e*Insight GUI.
- Exit all Windows programs, including any anti-virus applications.
- e*Insight requires the **Classes12.zip** file when connecting to an Oracle database. This file is installed as part of the Oracle installation.

To install the e*Insight GUI

- 1 Log into the workstation on which you want to install the GUI.
- 2 Insert the installation CD into the CD-ROM drive.
If Autorun is enabled, the setup program automatically starts. Otherwise:
 - ♦ On the task bar, click the **Start** button, and then click **Run**.
 - ♦ In the **Open** field, type **D:\setup\setup.exe** where **D:** is your CD-ROM drive.
- 3 Follow the online prompts through the **Welcome**, **Software License Agreement**, and **Information** dialog boxes.
- 4 When the **User Information** dialog box appears, enter the name of the user and company for which this software is installed, and then click **Next**.
- 5 In the **Please choose the product to install** dialog box, select the **e*Insight Business Process Manager** check box, and then click **Next**.

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

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

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

Note: *When you select e*Insight Suite, e*Insight Backend is automatically selected, and cannot be cleared.*

- 11 Highlight **e*Insight Suite**, and then click **Change**.
The **Select Sub-components** dialog box appears.

- 12 In the **Select Sub-components** dialog box, clear the **e*Xchange Administrator** check box, if it is not required.
- 13 Click **Continue** to return to the **Select Components** dialog box, and then click **Next**.
- 14 In the **Select Program Folder** dialog box, review the name of the default program folder for the e*Insight GUI icons; keep or change as needed, and then click **Next**.

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

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

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

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

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

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

Installing the e*Gate Schema for e*Insight

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

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

5.1 Overview

This chapter provides information on the following items:

- System requirements
- Installing the e*Gate Schema for e*Insight

5.2 System Requirements

The e*Insight schema and templates must be installed from a Windows NT or Windows 2000 workstation. Additional requirements include:

- Pentium-class CPU, 300 MHz or higher
- Minimum 128 MB RAM
- 70 MB disk space
- e*Insight requires the **Classes12.zip** file when connecting to an Oracle database. This file is installed as part of the Oracle installation.

The schema and template components are committed to the e*Insight schema on the e*Gate Registry Host specified during the installation process. See [“Creating the e*Insight Database Schema—Oracle” on page 33](#), [“Creating the e*Insight Database—SQL Server” on page 44](#) or [“Creating the e*Insight Database—Sybase” on page 51](#) for information on installing the e*Insight database schema.

5.3 Installing the Schema

Before you begin:

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

5.3.1 Installing the e*Gate Schema for e*Insight

This section explains how to install the schema. If your Registry Host is running on a UNIX machine, then you must install the schema from a Windows NT or Windows 2000 machine.

To install the e*Insight schema

- 1 Log in to the Windows NT or Windows 2000 machine from which you want to install the schema.
- 2 Insert the installation CD into the CD-ROM drive.
If Autorun is enabled, the setup program automatically starts. Otherwise:
 - ♦ On the task bar, click the **Start** button, and then click **Run**.
 - ♦ In the **Open** field, type **D:\setup\setup.exe** where **D:** is your CD-ROM drive.
- 3 Follow the online prompts through the **Welcome**, **Software License Agreement**, and **Information** dialog boxes.
- 4 When the **User Information** dialog box appears, enter the name of the user and company for which this software is installed, and then click **Next**.
- 5 In the **Please choose the product to install** dialog box, select the **e*Insight Business Process Manager** check box, and then click **Next**.

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

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

- 6 In the **Check Setup Information** dialog box, confirm that the **e*Insight** component has been selected, and then click **Next**.
This launches the **e*Insight** portion of the setup wizard.
- 7 Follow the online prompts through the **Welcome**, **Software License Agreement**, and **Information** dialog boxes.
- 8 In the **User Information** dialog box, enter the name of the user and company for which this software is installed, and then click **Next**.

- 9 In the **Choose Destination Location** dialog box, click **Browse** to change the destination folder, otherwise click **Next** to continue.
- 10 In the **Select Components** dialog box, select the **e*Gate Schema for e*Insight** check box. Make sure that the other check boxes are *not* selected.
- 11 Click **Next**.
The **Check Setup Information** dialog box appears.
- 12 In the **Check Setup Information** dialog box, review the installation information for the e*Gate Schema for e*Insight components, and then click **Next**.
The **Registry Host** dialog box appears.
- 13 In the **Registry Host** dialog box, enter the e*Gate Registry host name and schema to which you want to add the e*Gate components, and then click **Next**.
- 14 In the **Registry Schema** dialog box, enter a name for both the Classic and Java e*Insight schemas.
- 15 In the **Administrator Account Information** dialog box, enter the administrator **Username** and **Password**, and password confirmation, and then click **Next**.
- 16 In the **Control Broker Logical Name** dialog box, keep the default (*machine name_cb*) or type a new logical name for the Control Broker for which you want to add the e*Gate components, and then click **Next**.
- 17 In the **Select e*Gate platforms to support** dialog box, select the client platform that the e*Gate Registry will support, and then click **Next**.

The setup program begins installing the files on your machine.

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

- 18 In the **Setup Complete** dialog box, click **Finish** to complete the e*Gate Schema for e*Insight installation.
- 19 In the **Setup Complete** dialog box, select whether to reboot the computer now or later, and click **Finish** to complete the installation process.

Additional Installation Requirements

This chapter describes the process for installing JRE version 1.3, and also describes where Microsoft Data Access Components (MDAC) are installed automatically.

This chapter also tells how to install the User Activity sample application and how to install the SOAP add-on.

6.1 Overview

This chapter provides information on the following items:

- Installing the Java Runtime Environment (version 1.3)
- Installing the User Activity sample application
- Installing the SOAP add-on
- Installing the Microsoft Data Access Components

6.2 Installing the Java Runtime Environment

e*Insight requires JRE version 1.3. JRE 1.3 can be installed via InstallShield, to the default location:

```
\eInsight\Jre
```

To install the Java Runtime Environment Version 1.3

- 1 Log into the workstation on which you want to install JRE 1.3.
- 2 Insert the installation CD into the CD-ROM drive.
If Autorun is enabled, the setup program automatically starts. Otherwise:
 - ♦ On the task bar, click the **Start** button, and then click **Run**.
 - ♦ In the **Open** field, type **D:\setup\setup.exe** where **D:** is your CD-ROM drive.
- 3 Follow the online prompts through the **Welcome**, **Software License Agreement**, and **Information** dialog boxes.
- 4 When the **User Information** dialog box appears, enter the name of the user and company for which this software is installed, and then click **Next**.

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

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

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

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

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

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

- 8 In the **User Information** dialog box, enter the name of the user and company for which this software is installed, and then click **Next**.

- 9 In the **Choose Destination Location** dialog box, click **Browse** to change the destination folder if needed, and click **Next** to continue.

- 10 In the **Select Components** dialog box, select *only* **Java Runtime English**.

- 11 Click **Next**.

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

- 12 In the **Check Setup Information** dialog box, review the installation information for the e*Insight GUI, and then click **Next**.

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

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

- 13 In the **Setup Complete** dialog box, click **Finish** to complete the Java Runtime installation.

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

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

6.3 Installing the Sample Application

This section describes the process for installing the User Activity sample application for e*Insight.

Note: For configuration instructions, see *readme.txt*. The default location for this file is `<e*Insight>\Samples\UserActivity`.

User Activities allow external applications to access attributes in the business process using an Attribute Access API. The API provides a set of functions allowing the external application to access attributes for the User Activity from the e*Insight database. The external application can process and manipulate the attributes, and then send them back to the e*Insight database. The e*Insight engine uses the returned value of the attributes to continue the business process.

6.3.1 Installing the Sample Application on Windows NT or Windows 2000

To install the sample application components on Windows NT or Windows 2000

- 1 Log in to the workstation on which you want to install the schema.
- 2 Insert the installation CD into the CD-ROM drive.
If Autorun is enabled, the setup program automatically starts. Otherwise:
 - ♦ On the task bar, click the **Start** button, and then click **Run**.
 - ♦ In the **Open** field, type **D:\setup\setup.exe** where **D:** is your CD-ROM drive.
- 3 Follow the online prompts through the **Welcome**, **Software License Agreement**, and **Information** dialog boxes.
- 4 When the **User Information** dialog box appears, enter the name of the user and company for which this software is installed, and then click **Next**.
- 5 In the **Please choose the product to install** dialog box, select **e*Insight Business Process Manager**, and then click **Next**.

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

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

- 6 In the **Check Setup Information** dialog box, confirm that the **e*Insight** component has been selected, and then click **Next**.
This launches the **e*Insight** portion of the setup wizard.
- 7 Follow the online prompts through the **Welcome**, **Software License Agreement**, and **Information** dialog boxes.
- 8 In the **User Information** dialog box, enter the name of the user and company for which this software is installed, and then click **Next**.

- 9 In the **Choose Destination Location** dialog box, click **Browse** to change the destination folder, otherwise click **Next** to continue.
- 10 In the **Select Components** dialog box, select the **e*Insight Samples** check box. Make sure that the other check boxes are *not* selected.
- 11 Click **Next**.
The **Check Setup Information** dialog box appears.
- 12 In the **Check Setup Information** dialog box, review the installation information for the e*Gate Schema for e*Insight components, and then click **Next**.
The setup program begins installing the files on your machine.
- 13 In the **Setup Complete** dialog box, click **Finish** to complete the e*Gate Schema for e*Insight installation.
- 14 In the **Setup Complete** dialog box, select whether to reboot the computer now or later, and click **Finish** to complete the installation process.

6.4 Installing the SOAP Add-on

The e*Insight installation includes an option to install necessary components for Remote Sub-Processes to send and/or receive SOAP messages. These components include the Apache Web application server, and associated configuration and readme files.

To install the SOAP Add-on

- 1 Log into the workstation on which you want to install the SOAP Add-on.
- 2 Insert the installation CD into the CD-ROM drive.
If Autorun is enabled, the setup program automatically starts. Otherwise:
 - ♦ On the task bar, click the **Start** button, and then click **Run**.
 - ♦ In the **Open** field, type **D:\setup\setup.exe** where **D:** is your CD-ROM drive.
- 3 Follow the online prompts through the **Welcome**, **Software License Agreement**, and **Information** dialog boxes.
- 4 When the **User Information** dialog box appears, enter the name of the user and company for which this software is installed, and then click **Next**.
- 5 In the **Please choose the product to install** dialog box, select the **e*Insight Business Process Manager** check box, and then click **Next**.

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

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

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

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

- 7 Follow the online prompts through the **Welcome, Software License Agreement, and Information** dialog boxes.
- 8 In the **User Information** dialog box, enter the name of the user and company for which this software is installed, and then click **Next**.
- 9 In the **Choose Destination Location** dialog box, click **Browse** to change the destination folder if needed, and click **Next** to continue.
- 10 In the **Select Components** dialog box, select *only* **SOAP Add-on**.
- 11 Click **Next**.

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

- 12 In the **Check Setup Information** dialog box, review the installation information for the e*Insight SOAP add-on, and then click **Next**.

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

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

- 13 In the **Setup Complete** dialog box, click **Finish** to complete the SOAP Add-on installation.
- 14 In the **Setup Complete** dialog box, select whether you want to reboot the computer now or later, and then click **Finish** to complete the installation process.

Note: For information on configuring SOAP, see the *e*Insight Business Process Manager Implementation Guide*.

6.5 Installing the Microsoft Data Access Components

In version 4.5.2 of e*Insight, the Microsoft Data Access Components (MDAC) are installed automatically when you install the GUI. The MDAC are necessary if you are using a SQL Server database schema. The files are placed in the following folder:

```
\eInsight\integrator
```


Creating the e*Insight Database Schema—Oracle

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

7.1 Overview

This chapter provides information on the following items:

- System requirements
- Creating an Oracle Schema via the InstallShield wizard
- Creating an Oracle Schema manually
- Creating the Oracle ODBC Connection
- Uninstalling the Oracle Schema

7.2 System Requirements

- The e*Insight GUI requires the installation of the latest ODBC driver in order to connect to the Oracle database. The ODBC driver must be installed on the same machine as the e*Insight GUI.
- The e*Insight Oracle database schema must be created in an existing default Oracle 8i (8.1.6 or 8.1.7) instance. For requirements associated with the Oracle instance, see the appropriate Oracle user guides.
- The default disk space for the e*Insight Oracle schema is 250 MB. You should adjust this as necessary, based on the throughput requirements for your enterprise.
- The hard disk requirement for each Oracle 8i product includes 15 MB which is required to install Java Runtime Environment (JRE) and Oracle Universal Installer on the partition in which the operating system is installed.

7.3 Creating an Oracle Schema via InstallShield Wizard

This section describes how to create an Oracle database schema for e*Insight using the InstallShield wizard.

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

Follow these steps to create an Oracle schema

- 1 Run the InstallShield wizard from the setup program.
- 2 Modify the **init.ora** file.

Important: After you have created the Oracle schema, you must create an ODBC connection for the database to be able to log into it from the e*Insight GUI. See [“Using the e*Insight GUI with Oracle” on page 40](#).

Important: If you are upgrading and want to re-use previously created Business Processes then refer to [“Upgrading the e*Insight Database Schemas to Version 4.5.2” on page 63](#).

7.4 Installing the Schema

Before you begin

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

Important: If the database is running on a UNIX platform, then you must manually install the database schema. See [“Creating an Oracle Schema Manually” on page 37](#).

7.4.1 Installing the Database Schema from Windows NT or Windows 2000

To install the Database Schema from Windows NT or Windows 2000

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

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

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

- 3 Follow the online prompts through the **Welcome, Software License Agreement, and Information** dialog boxes.
- 4 When the **User Information** dialog box appears, enter the name of the user and company for which this software is installed, and then click **Next**.
- 5 In the **Please choose the product to install** dialog box, select the **e*Insight Business Process Manager** check box, and then click **Next**.

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

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

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

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

- 7 Follow the online prompts through the **Welcome, Software License Agreement, and Information** dialog boxes.
- 8 In the **User Information** dialog box, enter the name of the user and company for which this software is installed, and then click **Next**.
- 9 In the **Choose Destination Location** dialog box, click **Browse** to change the destination folder if needed, and click **Next** to continue.
- 10 In the **Select Components** dialog box, select the **Update or Create New e*Insight Database** check box. Make sure that the other check boxes are *not* selected.
- 11 Click **Next**.

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

- 12 In the **Check Setup Information** dialog box, review the installation information for the e*Insight database components, and then click **Next**.
- 13 In the **Select Database Server to support e*Insight** dialog box, select Oracle then click **Next**.
- 14 In the **Oracle Specific Info** dialog box, enter an Oracle Service/SID name, and then click **Next**.

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

- 15 The first **Table Space Information** dialog contains the directory names where the first and second tablespaces are created. The directories are created if they do not already exist. Change the default entries if required, and then click **Next**.

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

- 16 The second **Table Space Information** dialog appears. This contains the directory names for the third and fourth tablespaces. The directories are created if they do not

already exist. Change the default entries if required, and then click **Next**. The database schema is then installed.

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

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

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

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

Note: *If the owner for the database schema does not already exist, it is created as part of the installation process.*

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

7.4.2 Modifying the `init.ora` File for the e*Insight Database

If you create a new database, you must increase the `open_cursors` parameter for the e*Insight database to 1000. This parameter is stored in the `init.ora` file. When you open this file, verify that it contains the line specified in step 2, and add it if it is not in the file.

To modify the `init.ora` file

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

```
open_cursors = 1000
```
- 4 Save the file.
- 5 Restart the database.

7.5 Creating an Oracle Schema Manually

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

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

Follow these steps to create an Oracle schema

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

For more information, refer to [“Modifying the init.ora File for the e*Insight Database” on page 36](#).

Important: After you have created the Oracle schema, you must create an ODBC connection for the database to be able to log into it from the e*Insight GUI. See [“Using the e*Insight GUI with Oracle” on page 40](#).

Important: If you are upgrading and want to re-use previously created Business Processes, refer to [“Upgrading the e*Insight Database Schemas to Version 4.5.2” on page 63](#).

7.5.1 Copy the Installation Files to the e*Insight Root Directory

To copy the necessary files

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

```
CD:\setup\eInsight\database\Oracle
```

The result will be:

```
\eInsight\Oracle
```

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

7.5.2 Modifying the ex_defs.sql Script

For the Oracle database, you must modify `\eInsight\Oracle\ex_defs.sql` with information specific to your site.

To modify ex_defs.sql

- 1 Open `\eInsight\Oracle\ex_defs.sql` in any text editor.
- 2 Double-check that the path specified for `SCRIPT_HOME` is where you have copied the files from the CD, and edit the path as necessary.

For example:

```
define SCRIPT_HOME = "C:\eInsight\DBScripts\Oracle_Schema"
```

If you installed e*Insight on your D: drive, change the path to read:

```
define SCRIPT_HOME = "D:\eInsight\Oracle"
```

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

- 3 Replace the default user name and password for the schema owner.

For example:

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

- 4 Replace the default information with the location of the tablespaces for your site. This is listed under your Oracle install.

For example:

```
-- Oracle tablespace info:  
  
define TSP1 = "d:\Oracle\eInsight\dbms"  
define TSP2 = "d:\Oracle\eInsight\dbms"  
define TSP3 = "d:\Oracle\eInsight\dbms"  
define TSP4 = "d:\Oracle\eInsight\dbms"
```

Where `d:\Oracle\eInsight\` is the path to where you want the tablespaces created, and `\dbms` is your `TNS_NAME`.

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

- 5 Save and close the file.

7.5.3 Running the ex_install.sql Script

Once you have configured the parameters in `ex_defs.sql`, you can run the `ex_install.sql` script.

Important: If you are running certain versions of Oracle, for example 8.1.6, the path information is not retained by Oracle. In this case, when doing a manual database installation you must ensure that the installation is able to locate the correct files by doing either of the following:

- Launching SQL*Plus from the script directory
- Running the script directly from the command line (from inside the script directory)

To run the `ex_install.sql` script

- 1 Follow the steps outlined in “[To modify `ex_defs.sql`” on page 38](#).
- 2 Open SQL*Plus, and log in as an administrator, using the `TNS_NAME` (database name) as the Host String.
- 3 At the `SQL>` prompt type the command:

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

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

For example:

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

Note: Oracle version 8.1.6 does not remember the path when subsequent scripts are called from `ex_install.sql`. To resolve this problem, from the command prompt change directory to the location of your scripts. Then start SQL Plus from the command prompt rather than via the **Start** menu.

- 4 Press **Enter**.

The schema is created, and is owned by the user defined in `ex_def.sql`.

7.5.4 Modifying the `init.ora` File for the e*Insight Database

If you create a new database, you must increase the `open_cursors` parameter for the e*Insight database to 1000. This parameter is stored in the `init.ora` file. When you open this file, verify that it contains the line specified in step 2, and add it if it is not in the file.

To modify the `init.ora` file

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

```
open_cursors = 1000
```
- 4 Save the file.
- 5 Restart the database.

7.6 Using the e*Insight Engine with Oracle

The requirements for running the e*Insight engine with Oracle depend on the type of driver selected. The available drivers are **JDBC-Thin** (default) and **JDBC-OCI8**. The **JDBC-OCI8** driver is required if you are using the Model Specific database with XML attributes; otherwise, you can use the **JDBC-Thin** driver.

In order to use the **JDBC-OCI8** driver, you must install the Oracle client on the same machine as the e*Insight engine and install the latest version of the JDBC-OCI driver. For information on installing the driver, see [“Install Latest Drivers” on page 41](#).

Once you have installed the latest driver, you must copy the **Classes12.zip** file from the Oracle directory to the e*Gate directory. Copy **Classes12.zip** from:

```
<Oracle>\Ora81\jdbc\lib
```

to:

```
<eGate>\Client\Classes and
```

```
<eGate>\Server\Registry\Repository\Default\Classes
```

It is not necessary to install the Oracle client on the machines where the e*Insight engines run if you are using the JDBC-Thin driver. This driver is provided as part of the e*Insight installation.

7.7 Using the e*Insight GUI with Oracle

The e*Insight GUI requires the installation of an ODBC driver in order to connect to the Oracle database. The ODBC driver must be installed on the same machine as the e*Insight GUI.

In addition to the ODBC driver, the e*Insight GUI requires either the **JDBC-OCI8** (default) or **JDBC-Thin** driver. The **JDBC-OCI8** driver is required if you are using the Model Specific database with XML attributes; otherwise, you can use the **JDBC-Thin** driver.

In order to use the **JDBC-OCI8** driver, you must install the latest version of the JDBC-OCI driver. For information on installing the driver, see [“Install Latest Drivers” on page 41](#).

Once you have installed the latest driver, you must copy the **Classes12.zip** file from the Oracle directory to the e*Insight directory. Copy **Classes12.zip** from:

```
<Oracle>\Ora81\jdbc\lib
```

to:

```
<eInsight>\Integrator
```

7.7.1 Updating the GUI Configuration

Once you have successfully logged into e*Insight, the **Java Database Dialog** is no longer displayed. If you want to change your configuration, for example, from the JDBC-Thin driver to the JDBC-OCI8 driver, then you need to delete the existing configuration so the **Java Database Dialog** appears and you can enter the new information.

The Database URL and Database Driver parameters are stored in `<eInsight>\integrator\stcgui\properties`. An XML file is generated for every ODBC data source used to log into e*Insight and the name is based on the data source name.

For example, if your ODBC data source name is eInsight, then the parameters are stored in a file named eInsight.xml. If you want to change the configuration of your Database URL or Database Driver, delete the XML file for the connection. The next time you log in, the **Java Database Dialog** is displayed.

7.7.2 Install Latest Drivers

e*Insight version 4.5.2 supports the latest drivers. These drivers can be obtained from http://technet.oracle.com/software/utilities/software_index.htm. The latest versions available as of publication time are:

ODBC

Version 8.1.7.5.0 for Net 8 Client 8.1.7.0.0 (ODBC Version 3.51)

Version 8.1.6.6.0 for Net 8 Client 8.1.6.0.0 (ODBC Version 3.51)

JDBC-OCI8

Oracle8i 8.1.7 JDBC Drivers for use with JDK 1.2.x (JDBC-OCI / NT)

Once you have downloaded and extracted the necessary files, see the **readme.txt** file provided by Oracle for specific download instructions. You need to have access to the Universal Installer in order to install the new driver.

***Note:** To check what version Oracle driver you have, select the **Drivers** tab on the ODBC Data Source Administrator, located in the Control Panel. Once you have completed the installation, refer to this tab to confirm that it was successful. The version number on the Drivers tab is displayed in a slightly different format than that shown on the Oracle web page. For example, on the Web page, the version "8.1.5.7.0" is shown as "8.01.57.00" in the ODBC Data Source Administrator.*

***Important:** If you use Oracle 8.1.7 Server, do not use the ODBC driver Version 8.1.7.2.0. This may cause problems when importing the business process model.*

7.7.3 Create the ODBC Connection

To create the ODBC connection

Perform the following steps on the machine running the GUI.

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

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

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

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

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

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

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

You use this name to log in to the e*Insight GUI.

- 7 In the **Description** box, enter a description to distinguish it from the others, when selecting it from a list.

- 8 In the **Service Name** box in the **Data Source** area, type the service name for the e*Insight database.

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

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

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

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

- 11 Click **OK** to install the driver.

7.8 Uninstalling the e*Insight Database Schema

There is a script provided to completely uninstall the e*Insight database schema. If you used the InstallShield to install your e*Insight database schema, then **einsight_uninstall.sql** is located in <eInsight>\DBScripts\Oracle_Schema. If you manually installed the e*Insight Database Schema, then you determined the location of **einsight_uninstall.sql**.

To uninstall the e*Insight Database Schema

- 1 Open **einsight_uninstall.sql**.
- 2 Modify **SCRIPT_HOME** to define the location of your script.
- 3 Log into SQL*Plus as an administrator.
- 4 At the SQL> prompt type the command:

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

where

path to insight_uninstall.sql is the name and location of the **einsight_uninstall.sql** file that was copied from the e*Insight installation CD-ROM.

For example:

```
@c:\eInsight\DBScripts\Oracle_Schema\einsight_uninstall.sql
```

Creating the e*Insight Database—SQL Server

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

8.1 Overview

This chapter provides information on the following items:

- System requirements
- Creating a SQL Server database via InstallShield Wizard
- Creating a SQL Server database manually
- Creating the ODBC connection
- Uninstalling the SQL Server database

8.2 System Requirements

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

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

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

8.3 Creating a SQL Server Database via InstallShield Wizard

This section describes how to create a SQL Server database for e*Insight using the InstallShield wizard.

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

Follow this step to create a SQL Server database

- Run the InstallShield wizard from the setup program.

Important: After you have created the SQL Server database, you must create an ODBC connection for the database to be able to log into it from the e*Insight GUI. See [“Create the SQL Server ODBC Connection” on page 48](#).

Important: If you are upgrading and want to re-use previously created Business Processes then refer to [“Upgrading the e*Insight Database Schemas to Version 4.5.2” on page 63](#).

8.4 Installing the Database

Before you begin

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

8.4.1 Installing the Database on Windows NT or Windows 2000

To install the Database on Windows NT or Windows 2000

- 1 Log in to the machine running the DBMS.
- 2 Insert the installation CD into the CD-ROM drive.
If Autorun is enabled, the setup program automatically starts. Otherwise:
 - ♦ On the task bar, click the **Start** button, and then click **Run**.
 - ♦ In the **Open** field, type **D:\setup\setup.exe** where **D:** is your CD-ROM drive.
- 3 Follow the online prompts through the **Welcome**, **Software License Agreement**, and **Information** dialog boxes.
- 4 When the **User Information** dialog box appears, enter the name of the user and company for which this software is installed, and then click **Next**.

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

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

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

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

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

- 7 Follow the online prompts through the **Welcome**, **Software License Agreement**, and **Information** dialog boxes.
- 8 In the **User Information** dialog box, enter the name of the user and company for which this software is installed, and then click **Next**.
- 9 In the **Choose Destination Location** dialog box, click **Browse** to change the destination folder, otherwise click **Next** to continue.
- 10 In the **Select Components** dialog box, select the **Upgrade or Create New *Insight Database** check box. Make sure that the other check boxes are *not* selected.
- 11 Click **Next**.

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

- 12 In the **Check Setup Information** dialog box, review the installation information for the e*Insight database components, and then click **Next**.
- 13 In the **Select Database Server to support e*Insight** dialog box, select **SQL Server** then click **Next**.
- 14 In the **SQL Server Specific Info** dialog box, enter a Host and Database name, and then click **Next**.
- 15 Enter a Data Location and then click **Next**.
- 16 In the **Database Administrator Information** dialog box, enter the SQL Server administrator **Username** and **Password**, and then click **Next**.
- 17 In the **Database Schema Owner Information** dialog box, enter an Owner and Password for the database, and then click **Next**.

Note: *If the owner for the database does not already exist, it is created as part of the installation process.*

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

8.5 Creating a SQL Server Database Manually

This section describes how to create a SQL Server database for e*Insight on a Windows NT or Windows 2000 machine. You can create the database either before or after installing the GUI. However, if you install the database first, you must copy the SQL Server folder as described in [“Copy the Installation Files to the e*Insight Root Directory” on page 47](#), to a location other than the e*Insight Root directory, as it is not yet installed.

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

Important: If you are upgrading and want to re-use previously created Business Processes, refer to [“Upgrading the e*Insight Database Schemas to Version 4.5.2” on page 63](#).

Follow these steps to create a SQL Server database

- 1 Copy the installation files from the e*Insight Installation CD to the e*Insight root directory.
- 2 Modify **ss_ex_defs.cmd**.
- 3 Configure the database.

Important: After you have created the SQL Server database, you must create an ODBC connection for the database to be able to log into it from the e*Insight GUI. See [“Create the SQL Server ODBC Connection” on page 48](#).

8.5.1 Copy the Installation Files to the e*Insight Root Directory

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

To copy the necessary files

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

```
CD:\setup\eInsight\database\sqlserver
```

The result will be:

```
\eInsight\sqlserver
```

8.5.2 Modify SQL Statements

For the SQL Server database, you must modify `ss_ex_defs.cmd` with information specific to your site, and then run `ss_ex_install.cmd`.

To modify `ss_ex_defs.sql`

- 1 Open `\eInsight\sqlserver\ss_ex_defs.cmd` in any text editor.
- 2 Replace the default information as required.

For example:

```
:@setDbo
@set __USER=sa

:@setDboPassword
@set __PASSWORD=sa
:@setHost
@set __HOST=%COMPUTERNAME%

:@setDatabase
@set __DATABASE=eInsight

:@setISQLPath
@set __ISQLPATH=C:\MSSQL7\BINN\

:@setSchemaOwner
@set __SCHEMA_OWNER=ex_admin

:@setSchemaOwnerPassword
@set __SCHEMA_OWNER_PASSWORD=ex_admin

:@setDataLocation
@set __DATA_LOCATION=C:\MSSQL7\DATA
```

- 3 Save and close the file.

8.5.3 Running the `ss_ex_install.sql` Script

Once you have configured the parameters in `ss_ex_defs.cmd`, you can run the `ss_ex_install.cmd` script.

To run the `ss_ex_install.cmd` script

- 1 Follow the steps outlined in [“To modify `ss_ex_defs.sql`” on page 48](#).
- 2 Run `ss_ex_install.cmd`.

The database is created, and is owned by the user defined in `ss_ex_defs.cmd`.

8.6 Create the SQL Server ODBC Connection

The e*Insight GUI requires the installation of the SQL Server ODBC driver in order to connect to the SQL Server database. The ODBC driver must be installed on the same machine as the e*Insight GUI.

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

To create the ODBC connection

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

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

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

- 6 Select **SQL Server**, and click **Finish**.
- 7 In the **Name** box, type the name of the data source. This can be any name.
- 8 (Optional) In the **Description** box, type the description of the data source.
- 9 From the **Server** list, select the Server to which you want to connect, and click **Next**.

The **Microsoft SQL Server DSN Configuration** dialog box appears.

- 10 Select the **“With SQL Server authentication...”** radio button.
- 11 In the **Login ID** and **Password** boxes, type **“ex_admin”**.

This is the Login ID and Password you use when logging into this database in the e*Insight GUI.

- 12 Click **Client Configuration**.

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

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

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

- 15 Select **Change the default database to**, and then type the name of the database you created.
- 16 Clear the **Use ANSI quoted identifiers** and **Use ANSI nulls, paddings and warnings**, and then click **Next**.

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

- 17 Accept the defaults.

Note: Make sure that **Use regional settings when outputting currency, numbers, dates and times** is not selected.

- 18 Click **Finish**.

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

- 19 Click **Test Data Source**.

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

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

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

8.7 Uninstalling the SQL Server Database

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

Creating the e*Insight Database—Sybase

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

9.1 Overview

This chapter provides information on the following items:

- System requirements
- Creating a Sybase database via the InstallShield wizard
- Creating a Sybase database manually
- Creating the Sybase ODBC connection
- Configuring Sybase jConnect for JDBC
- Uninstalling the Sybase database

9.2 System Requirements

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

9.2.1 Configuration Changes to the Sybase Server

The following configuration changes should be made to the Sybase server before installing the database.

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

To configure Sybase Server on Windows NT or Windows 2000

- 1 In Sybase Central, right click on the server and select **Configure**.
- 2 Change the value for "cis cursor rows" and "number of devices".
- 3 Stop the server and restart it.

To configure Sybase Server on UNIX

- 1 Log in as system administrator using isql.
- 2 Run the following configuration commands:

```
sp_configure "cis cursor rows", 100
go
sp_configure "number of devices", 100
go
```

- 3 Shut down the server and restart.

9.3 Creating a Sybase Database via InstallShield Wizard

This section describes how to create a Sybase database for e*Insight using the InstallShield wizard.

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

Follow these steps to create a Sybase database

- Run the InstallShield wizard from the setup program.
- Configure the database to support metadata.

Important: After you have created the Sybase database, you must create an ODBC connection for the database to be able to log into it from the e*Insight GUI. See [“Create the Sybase ODBC Connection” on page 56](#).

Important: If you are upgrading and want to re-use previously created Business Processes, refer to [“Upgrading the e*Insight Database Schemas to Version 4.5.2” on page 63](#).

9.4 Installing the Database

Before you begin:

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

Important: If the database is running on a UNIX platform, then you must manually install the database. See [“Creating a Sybase Database Manually” on page 54](#).

9.4.1 Installing the Database on Windows NT or Windows 2000

To install the Database on Windows NT or Windows 2000

- 1 Log in to the machine running the DBMS.
- 2 Insert the installation CD into the CD-ROM drive.
If Autorun is enabled, the setup program automatically starts. Otherwise:
 - ♦ On the task bar, click the **Start** button, and then click **Run**.
 - ♦ In the **Open** field, type **D:\setup\setup.exe** where **D:** is your CD-ROM drive.
- 3 Follow the online prompts through the **Welcome**, **Software License Agreement**, and **Information** dialog boxes.
- 4 When the **User Information** dialog box appears, enter the name of the user and company for which this software is installed, and then click **Next**.
- 5 In the **Please choose the product to install** dialog box, select the **e*Insight Business Process Manager** check box, and then click **Next**.

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

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

- 6 In the **Check Setup Information** dialog box, confirm that the **e*Insight** component has been selected, and then click **Next**.
This launches the **e*Insight** portion of the setup wizard.
- 7 Follow the online prompts through the **Welcome**, **Software License Agreement**, and **Information** dialog boxes.
- 8 In the **User Information** dialog box, enter the name of the user and company for which this software is installed, and then click **Next**.
- 9 In the **Choose Destination Location** dialog box, click **Browse** to change the destination folder if needed, and click **Next** to continue.
- 10 In the **Select Components** dialog box, select the **Upgrade or Create New e*Insight Database** check box. Make sure that the other check boxes are *not* selected.
- 11 Click **Next**.
The **Check Setup Information** dialog box appears.
- 12 In the **Check Setup Information** dialog box, review the installation information for the **e*Insight** database components, and then click **Next**.
- 13 In the **Select Database Server to support e*Insight** dialog box, select **Sybase**, and then click **Next**.
- 14 In the **Sybase Specific Info** dialog box, enter the **Host** and **Database**, and then click **Next**.

- 15 In the **Data Location Information** dialog box, enter your data location, and then click **Next**.
- 16 In the **Database Administrator Information** dialog box, enter an Administrator Username and Password, and then click **Next**.
- 17 In the **Database Schema Owner Information** dialog box, enter an Owner and Password, and then click **Next**.
- 18 An information message appears to show that **sy_ex_install.bat** has been launched successfully. Click **OK**.
- 19 In the **Setup Complete** dialog box, click **Finish** to complete the e*Insight database installation.

9.4.2 Configuring the Database to Support Metadata

After you have successfully completed the installation of the e*Insight database, you must configure the database to support metadata accessor for the Sybase jConnect driver. This can be done via Sybase Central, or by executing a Sybase SQL statement.

The **sql_server.sql** script is located in <eInsight>\DBScripts\Sybase_Schema folder. Run the following command:

```
isql -Usa -P<sa_password> -S<hostname> -D<dbname> -i<sql_stmt.sql>
```

For example:

```
isql -Usa -Pmanager -Slocalhost -DeInsight -  
ic:\eInsight\DBScripts\Sybase_Schema\sql_server.sql
```

9.5 Creating a Sybase Database Manually

The following section provides you with instructions for creating a Sybase database in lieu of creating it using the Sybase GUI. For information on creating a database using the Sybase GUI, see Sybase-specific documentation. You can create the database either before or after installing the e*Insight GUI.

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

Follow these steps to create a Sybase Database

- Copy the installation files from the e*Insight Installation CD to the e*Insight root directory.
- Modify **syb_ex_defs.cmd**.
- Modify and run the installation file.
- Configure the database to support metadata.

Important: After you have created the Sybase database, you must create an ODBC connection for the database to be able to log into it from the e*Insight GUI. See [“Create the Sybase ODBC Connection” on page 56](#).

9.5.1 Copy the Installation Files to the e*Insight Root Directory

The e*Insight Sybase database can be installed from either the Client or the Server.

To copy the necessary files

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

```
CD:\setup\eInsight\database\sybase
```

The result will be:

```
\eInsight\sybase
```

9.5.2 Modify SQL Statements

For the Sybase database, you must modify `syb_ex_defs.cmd` with information specific to your site, and then run `syb_ex_install.cmd`.

To modify `syb_ex_defs.cmd`

- 1 Open `\eInsight\sybase\syb_ex_defs.cmd` in any text editor.
- 2 Replace the default information as required.

For example:

```
:@setDbo
@set __USER=sa

:@setDboPassword
@set __PASSWORD=password

:@setHost
@set __HOST=%COMPUTERNAME%

:@setDatabase
@set __DATABASE=eInsight

:@setISQLPath
@set __ISQLPATH=C:\SYBASE\BIN\

:@setSchemaOwner
@set __SCHEMA_OWNER=ex_admin

:@setSchemaOwnerPassword
@set __SCHEMA_OWNER_PASSWORD=ex_admin

:@setDataLocation
@set __DATA_LOCATION=C:\SYBASE\DATA
```

- 3 Save and close the file.

9.5.3 Running the syb_ex_install.cmd Script

Once you have configured the parameters in `syb_ex_defs.cmd`, then you can run the `syb_ex_install.cmd` script.

To run the `syb_ex_install.cmd` script

- 1 Follow the steps outlined in [“To modify syb_ex_defs.cmd” on page 55](#).
- 2 Run `syb_ex_defs.cmd`.
- 3 Press **Enter**.

The database is created, and is owned by the user defined in `syb_ex_defs.cmd`.

9.5.4 Configuring the Database to Support Metadata

After you have successfully completed the installation of the e*Insight database, you need to configure the database to support metadata accessor for the Sybase jConnect driver. This can be done via Sybase Central, or by executing a Sybase SQL statement.

The `sql_server.sql` script is located in `<eInsight>\DBScripts\Sybase_Schema` folder. Run the following command:

```
isql -Usa -P<sa_password> -S<hostname> -D<dbname> -i<sql_stmt.sql>
```

For example:

```
isql -Usa -Pmanager -Slocalhost -DeInsight -  
ic:\eInsight\DBScripts\Sybase_Schema\sql_server.sql
```

9.6 Create the Sybase ODBC Connection

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

To create the ODBC connection

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

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

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

- 6 Select **Sybase System 11**, and click **Finish**.
The Setup dialog box for your DSN entry appears.
- 7 In the **Data Source Name** box, type the name of the data source you created.
- 8 (Optional) In the **Description** box, type the description of the data source.
- 9 In the **Server Name** box, type the name of the server on which you installed the database.
- 10 In the **Database Name** box, type the name of the database for which you are creating the connection.
- 11 Click the **Performance** tab.
- 12 In the **Select Method** field, set the value to **0 - Cursor**.
- 13 Click **OK**.
- 14 Double-check that the database connection you just set up is listed, and then click **OK** to close the **ODBC Data Source Administrator**.

You may receive the following error message when connecting to this database using e*Insight.

```
ct-connect():directory service layer:internal directory control layer  
error:Requested Server Name not found
```

If this error is received, you must define the Server Object.

To define the Server Object

- 1 From the **Start** menu, point to **Programs**, point to **Sybase** and then click **Dsedit**.
- 2 Select a **Directory Service** and click **OK**.
- 3 From Dsedit Server Object, click **Add**.
- 4 Enter the server name.
- 5 In the Dsedit window, select the server name entered in the previous step.
- 6 Double-click **Server Address**.
- 7 Select **Add**.
- 8 Enter <server-name>,<port>. For example, eInsight,2048.
- 9 Click **OK**.
- 10 From Network Address Attribute click **OK**.
- 11 Close Dsedit.

9.7 Configuring Sybase jConnect for JDBC

You must install Sybase stored procedures if you are using JDBC jConnect to establish the Sybase connection. Enter the following command with information specific to your site.

```
%JAVA_HOME%\bin\java -cp .;./jconn2.jar IsqlApp -U sa -P <sa  
password> -S jdbc:sybase:Tds:<host name>:<port> -I  
<sybase_util_directory>\jConnect5_2\sp\sql_server.sql -c go
```

See the Sybase jConnect JDBC Installation Guide for more information.

9.8 Uninstalling the Sybase Database

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

Updating the e*Gate Schema for e*Insight from 4.1.2

Updating the e*Gate Schema for e*Insight from 4.1.2 to 4.5.1 or above is performed when the Registry Host is installed. Please refer to the e*Gate installation guide for details on how to install the Registry Host.

Important: *If you are using e*Insight 4.5.2 with e*Gate 4.5.1, then you must install ESR 42303.*

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

Important: *If you are upgrading from 4.1.1, you must run the install script to update the schemas from 4.1.1 to 4.1.2. See “[Update 4.1.1 e*Insight e*Gate Schemas](#)” on [page 81](#).*

A.1 After Upgrading

When you have completed the upgrade, there might be files and icons left over from version 4.1.2, either for eBPM or ePartner Manager. These do not affect the running of your e*Insight application; however, you can delete them. Check for the following, and remove them if desired:

- Desktop icons for eBPM or ePartner Manager
- Start menu icons for eBPM or ePartner Manager

If you are not using e*Xchange Partner Manager then you can remove the following:

- An eXchange folder in your directory structure, at the same level as your new eInsight folder.
- e*Xchange items on the Programs menu that do not appear within the **e*Insight Business Process Manager** program group.

A.2 Updating Data Types

Prior to 4.5, e*Insight recognized only the String data type when messages were sent to the engine. For example, in 4.1.2, every Monk script had to treat the attribute as if it were a string regardless of whether this was defined as a String, Number or Boolean data type in e*Insight:

```
(eX-set-attribute ~output%eX_Standard_Event "Quantity" "2" "STRING")
```

From 4.5 onward, however, such a script treats boolean data as being of data type BOOLEAN and treats numeric data as being of data type NUMBER:

```
(eX-set-attribute ~output%eX_Standard_Event "Quantity" "2" "NUMBER")
```

Important: For every local or global attribute that is defined in e*Insight as a Number or Boolean data type, you must update the Monk script to use the relevant data type of either NUMBER or BOOLEAN, as in the above example.

A.3 Creating a New Configuration File for the eX_eBPM Engine (Optional)

Although the eX_eBPM engine can use the existing configuration file, new parameters have been added since e*Insight version 4.1.2. The parameters include:

- Auto Model Reload (e*Insight version 4.5.1)
- Instance Caching (e*Insight version 4.5.1)
- Maximum Instance Cache Size (e*Insight version 4.5.2)

For more information on these parameters, see the *e*Insight Business Process Manager Implementation Guide*.

If you do not want to make use of these parameters, then the e*Gate schema for e*Insight does not require any modifications. However, in order to use the new parameters, you must create a new configuration file.

To create a new configuration file

- 1 Open the engine properties.
- 2 Click **Clear** to clear the configuration file.
- 3 Click **New** to create a new configuration file.
- 4 Make the required changes, and then save.

You must follow this procedure for every engine.

Updating the e*Gate Schema for e*Insight from 4.5

Updating the e*Gate Schema for e*Insight from 4.5 to 4.5.1 or above is performed when the Registry Host is installed. Please refer to the e*Gate installation guide for details on how to install the Registry Host.

Important: *If you are using e*Insight 4.5.2 with e*Gate 4.5.1, then you must install ESR 42303.*

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

If you are upgrading from 4.1.2 to 4.5.x, see [“Updating the e*Gate Schema for e*Insight from 4.1.2” on page 59.](#)

B.1 Creating a New Configuration File for the eX_eBPM Engine (Optional)

Although the eX_eBPM engine can use the existing configuration file, new parameters have been added since e*Insight version 4.1.2. The parameters include:

- Auto Model Reload (e*Insight version 4.5.1)
- Instance Caching (e*Insight version 4.5.1)
- Maximum Instance Cache Size (e*Insight version 4.5.2)

For more information on these parameters, see the *e*Insight Business Process Manager Implementation Guide*.

If you do not want to make use of these parameters, then the e*Gate schema for e*Insight does not require any modifications. However, in order to use the new parameters, you must create a new configuration file.

To create a new configuration file

- 1 Open the engine properties.
- 2 Click **Clear** to clear the configuration file.
- 3 Click **New** to create a new configuration file.

- 4 Make the required changes, and then save.
You must follow this procedure for every engine.

Upgrading the e*Insight Database Schemas to Version 4.5.2

This appendix describes how to upgrade an existing 4.1.2, 4.5 or 4.5.1 e*Insight database schema to work with e*Insight version 4.5.2.

Important: *If you are upgrading from 4.1 to 4.5.2, you must first run the install script to update the schemas from 4.1 to 4.1.1. See [“Upgrading the e*Xchange Database Schemas from Version 4.1.0 to 4.1.1” on page 95](#). Then follow the upgrade procedure to update schemas from 4.1.1 to 4.1.2. See [“Upgrading the e*Xchange Database Schemas from Version 4.1.1 to 4.1.2” on page 84](#).*

C.1 Upgrading the Database Schema

Before upgrading your Database Schema to e*Insight 4.5.2 you must do the following:

- Install the back end (which is automatically installed with the e*Insight GUI) and JRE.

As a precaution you may want to do the following:

- Back up your database.
- Export all models and instance data from the e*Xchange eBusiness Process Manager GUI (Version 4.1.2) or e*Insight Business Process Manager GUI (Version 4.5).

C.2 Upgrading an Oracle Schema

This section describes how to upgrade an Oracle database for e*Insight from either Version 4.1.2, 4.5, or 4.5.1 to 4.5.2. This can be achieved either by the InstallShield wizard or by manually running the upgrade scripts.

C.2.1 Upgrading an Oracle Schema using the InstallShield Wizard

The InstallShield wizard can be used to upgrade from either 4.1.2, 4.5, or 4.5.1 to 4.5.2. The InstallShield wizard detects the current version of the e*Insight database and runs the appropriate scripts.

To upgrade the database schema from Windows NT or Windows 2000

- 1 Insert the installation CD into the CD-ROM drive.
If Autorun is enabled, the setup program automatically starts. Otherwise:
 - ♦ On the task bar, click the **Start** button, and then click **Run**.
 - ♦ In the **Open** field, type **D:\setup\setup.exe** where **D:** is your CD-ROM drive.
- 2 Follow the online prompts through the **Welcome**, **Software License Agreement**, and **Information** dialog boxes.
- 3 When the **User Information** dialog box appears, enter the name of the user and company for which this software is installed, and then click **Next**.
- 4 In the **Please choose the product to install** dialog box, select the **e*Insight Business Process Manager** check box, and then click **Next**.

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

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

- 5 In the **Check Setup Information** dialog box, confirm that the **e*Insight** component has been selected, and then click **Next**.
This launches the **e*Insight** portion of the setup wizard.
- 6 Follow the online prompts through the **Welcome**, **Software License Agreement**, and **Information** dialog boxes.
- 7 In the **User Information** dialog box, enter the name of the user and company for which this software is installed, and then click **Next**.
- 8 In the **Choose Destination Location** dialog box, click **Browse** to change the destination folder if needed, and click **Next** to continue.
- 9 In the **Select Components** dialog box, select the **Update or Create New e*Insight Database** check box. Make sure that the other check boxes are *not* selected.
- 10 Click **Next**.
The **Check Setup Information** dialog box appears.
- 11 In the **Check Setup Information** dialog box, review the installation information for the e*Insight database components, and then click **Next**.
- 12 In the **Select Database Server to support e*Insight** dialog box, select **Oracle** then click **Next**.
- 13 In the **Oracle Specific Info** dialog box, enter an Oracle Service/SID name, and then click **Next**.

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

- 14 The first **Table Space Information** dialog contains the directory names where the first and second tablespaces are be created. The directories are created if they do not already exist. Change the default entries if required, and then click **Next**.

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

- 15 The second **Table Space Information** dialog appears. This contains the directory names for the third and fourth tablespaces. The directories are created if they do not already exist. Change the default entries if required, and then click **Next**. The Database Schema is then installed.

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

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

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

- 17 In the **Database Schema Owner Information** dialog box, enter an Owner and Password for the database schema, and then click **Next**.
- 18 If a previous version of an e*Insight database exists, you are prompted to upgrade. Click **Yes** to continue.
- 19 In the **Setup Complete** dialog box, click **Finish** to complete the e*Insight Database Schema installation.
- 20 In the **Setup Complete** dialog box, select whether to reboot the computer now or later, and click **Finish** to complete the installation process.

C.2.2 Upgrading an Oracle Schema Manually

The upgrade steps differ slightly depending on whether you are upgrading from Version 4.1.2 or 4.5. Refer to either [“Upgrading an Oracle Schema Manually” on page 65](#) or [“Upgrading an Oracle Schema Manually from 4.1.2 to 4.5.2” on page 65](#).

C.2.3 Upgrading an Oracle Schema Manually from 4.1.2 to 4.5.2

Follow these steps to upgrade an Oracle schema

- 1 Copy the installation files from the e*Insight Installation CD to the e*Insight root directory.
- 2 Modify **ex_defs.sql**.
- 3 Run **eInsightUpgrade412_45.sql**.
- 4 Modify **upgrader.cmd** and **Upgrader.properties**.
- 5 Run **upgrader.cmd**.
- 6 Run **eInsightUpgrade45_451.sql**.

7 Run `eInsightUpgrade451_452.sql`.

Step 1: Copy the Installation Files to the e*Insight Root Directory

The e*Insight Oracle database can be installed from either the Client or the Server.

To copy the necessary files

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

```
CD:\setup\eInsight\database\oracle
```

The result will be:

```
\eInsight\oracle
```

Step 2: Modify `ex_defs.sql`

For the Oracle database, you must modify `ex_defs.sql` with information specific to your site, and then run the upgrade script.

To modify `ex_defs.sql`

- 1 Open `\eInsight\Oracle\ex_defs.sql` in any text editor.
- 2 Double-check that the path specified for `SCRIPT_HOME` is where you have copied the files from the CD, and edit the path as necessary.

For example:

```
define SCRIPT_HOME = "\eInsight\Oracle"
```

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

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

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

- 3 Replace the default user name and password for the schema owner.

For example:

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

- 4 Replace the default information with the location of the tablespaces for your site. This is listed under your Oracle install.

For example:

```
-- Oracle tablespace info:  
  
define TSP1 = "d:\Oracle\eInsight\dfs"  
define TSP2 = "d:\Oracle\eInsight\dfs"  
define TSP3 = "d:\Oracle\eInsight\dfs"  
define TSP4 = "d:\Oracle\eInsight\dfs"
```

Where `d:\Oracle\eInsight\` is the path to where you want the tablespaces created, and `\dfs` is your `TNS_NAME`.

- 5 Save and close the file.

Step 3: Run eInsightUpgrade412_45

Once you have configured the parameters in `ex_defs.sql`, then you can run the `eInsightUpgrade412_45.cmd` script.

To run the `eInsightUpgrade412_45.sql` script

- 1 Follow the steps outlined in “[Step 2: Modify ex_defs.sql](#)” on page 66.
- 2 Log into SQLPlus as the administrator and run `eInsightUpgrade412_45.sql`.

Step 4: Modify upgrader.cmd and Upgrader.properties

The e*Insight database requires modifications to support expressions for 4.5.1. You need to make these changes using `upgrader.cmd` before the tables are updated to 4.5.1.

To modify `upgrader.cmd`

- 1 Open `\eInsight\oracle\upgrader.cmd` in any text editor.
- 2 This file defines the path for the e*Insight Integrator directory and the Java Runtime Environment bin directory. Replace the path information as required.

For example:

```
c:\eInsight\JRE\1.3\bin\java -cp
c:\eInsight\integrator\workflow.jar;c:\eInsight\integrator\classes
12.zip;c:\eInsight\integrator\DGbase.jar;c:\eInsight\integrator\DG
util.jar; com.stc.bpms.test.Upgrader
```

Change the default paths shown in bold, if necessary.

- 3 Save and close the file.

To modify `Upgrader.properties`

- 1 Open `\eInsight\oracle\Upgrader.properties` in any text editor.
- 2 Replace the variables that start with `MY_`.

```
userID=MY_SCHEMA_OWNER_NAME
password=MY_SCHEMA_OWNER_PASSWORD

DBServerType=Oracle
driverName=oracle.jdbc.driver.OracleDriver
dbURL=jdbc:oracle:thin:@MY_MACHINE:1521:MY_DBNAME
```

- 3 Save and close the file.

Step 5: Run upgrader.cmd

Once you have configured the parameters in `upgrader.cmd` and `Upgrader.properties`, then you can run the `upgrader.cmd` script.

To run the `upgrader.cmd` script

- 1 Follow the steps outlined in “[Step 4: Modify upgrader.cmd and Upgrader.properties](#)” on page 67.
- 2 Run `upgrader.cmd`.

Step 6: Run eInsightUpgrade45_451

Once you have configured the parameters in `ex_defs.sql`, then you can run the `eInsightUpgrade412_45.sql`.

To run the `eInsightUpgrade412_45.sql` script

- 1 Follow the steps outlined in “[Step 2: Modify ex_defs.sql](#)” on page 66.
- 2 Log into SQLPlus as the administrator and run `eInsightUpgrade45_451.sql`.

The Oracle database schema is now upgraded to 4.5.1.

Step 7: Run eInsightUpgrade451_452

Once you have configured the parameters in `ex_defs.sql`, then you can run the `eInsightUpgrade412_45.sql`.

To run the `eInsightUpgrade412_45.sql` script

- 1 Follow the steps outlined in “[Step 2: Modify ex_defs.sql](#)” on page 66.
- 2 Log into SQLPlus as the administrator and run `eInsightUpgrade45_451.sql`.

The Oracle database schema is now upgraded to 4.5.2.

C.2.4 Upgrading an Oracle Schema Manually from 4.5 to 4.5.2

Follow these steps to upgrade an Oracle schema

- 1 Copy the installation files from the e*Insight Installation CD to the e*Insight root directory.
- 2 Modify `ex_defs.sql`.
- 3 Run `eInsightUpgrade45_451.sql`.
- 4 Run `eInsightUpgrade451_452.sql`.

Step 1: Copy the Installation Files to the e*Insight Root Directory

The e*Insight Oracle database can be installed from either the Client or the Server.

To copy the necessary files

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

```
CD:\setup\eInsight\database\oracle
```

The result will be:

```
\eInsight\oracle
```

Step 2: Modify ex_defs.sql

For the Oracle database, you must modify `ex_defs.sql` with information specific to your site, and then run the upgrade script.

To modify ex_defns.sql

- 1 Open `\eInsight\Oracle\ex_defns.sql` in any text editor.
- 2 Double-check that the path specified for `SCRIPT_HOME` is where you have copied the files from the CD, and edit the path as necessary.

For example:

```
define SCRIPT_HOME = "\eInsight\Oracle"
```

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

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

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

- 3 Replace the default user name and password for the schema owner.

For example:

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

- 4 Replace the default information with the location of the tablespaces for your site. This is listed under your Oracle install.

For example:

```
-- Oracle tablespace info:  
  
define TSP1 = "d:\Oracle\eInsight\dbms"  
define TSP2 = "d:\Oracle\eInsight\dbms"  
define TSP3 = "d:\Oracle\eInsight\dbms"  
define TSP4 = "d:\Oracle\eInsight\dbms"
```

Where `d:\Oracle\eInsight\` is the path to where you want the tablespaces created, and `\dbms` is your `TNS_NAME`.

- 5 Save and close the file.

Step 3: Run eInsightUpgrade45_451.sql

Once you have configured the parameters in `ex_defns.sql`, then you can run the `eInsightUpgrade45_451.sql` script.

To run the `eInsightUpgrade45_451.sql` script

- 1 Follow the steps outlined in [“Step 2: Modify ex_defns.sql” on page 68](#).
- 2 Log into SQLPlus as the administrator and run `eInsightUpgrade45_451.sql`.

Step 3: Run eInsightUpgrade451_452.sql

Once you have configured the parameters in `ex_defns.sql`, then you can run the `eInsightUpgrade451_452.sql` script.

To run the `eInsightUpgrade451_452.sql` script

- 1 Follow the steps outlined in [“Step 2: Modify ex_defns.sql” on page 68](#).
- 2 Log into SQLPlus as the administrator and run `eInsightUpgrade451_452.sql`.

C.3 Upgrading a SQL Server Schema

This section describes how to upgrade a SQL Server database for e*Insight from either Version 4.1.2, 4.5, or 4.5.1 to 4.5.2. This can be achieved either by the InstallShield wizard or by manually running the upgrade scripts.

C.3.1 Upgrading a SQL Server Schema Using the InstallShield Wizard

- 1 Log in to the machine running the DBMS.
- 2 Insert the installation CD into the CD-ROM drive.
If Autorun is enabled, the setup program automatically starts. Otherwise:
 - ♦ On the task bar, click the **Start** button, and then click **Run**.
 - ♦ In the **Open** field, type **D:\setup\setup.exe** where **D:** is your CD-ROM drive.
- 3 Follow the online prompts through the **Welcome**, **Software License Agreement**, and **Information** dialog boxes.
- 4 When the **User Information** dialog box appears, enter the name of the user and company for which this software is installed, and then click **Next**.
- 5 In the **Please choose the product to install** dialog box, select the **e*Insight Business Process Manager** check box, and then click **Next**.

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

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

- 6 In the **Check Setup Information** dialog box, confirm that the **e*Insight** component has been selected, and then click **Next**.
This launches the **e*Insight** portion of the setup wizard.
- 7 Follow the online prompts through the **Welcome**, **Software License Agreement**, and **Information** dialog boxes.
- 8 In the **User Information** dialog box, enter the name of the user and company for which this software is installed, and then click **Next**.
- 9 In the **Choose Destination Location** dialog box, click **Browse** to change the destination folder if needed, and click **Next** to continue.
- 10 In the **Select Components** dialog box, select the **Upgrade or Create New *Insight Database** check box. Make sure that the other check boxes are *not* selected.
- 11 Click **Next**.

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

- 12 In the **Check Setup Information** dialog box, review the installation information for the e*Insight database components, and then click **Next**.
- 13 In the **Select Database Server to support e*Insight** dialog box, select **SQL Server** then click **Next**.
- 14 In the **SQL Server Specific Info** dialog box, enter a Host and Database name, and then click **Next**.
- 15 Enter a Data Location and then click **Next**.
- 16 In the **Database Administrator Information** dialog box, enter the SQL Server administrator **Username** and **Password**, and then click **Next**.
- 17 In the **Database Schema Owner Information** dialog box, enter an Owner and Password for the database schema, and then click **Next**.
- 18 If a previous version of an e*Insight database exists you are prompted to upgrade. Click **Yes** to continue.
- 19 An information message appears to show that **ss_ex_install.bat** has been launched successfully. Click **OK**.
- 20 In the **Setup Complete** dialog box, click **Finish** to complete the e*Insight Database Schema installation.

C.3.2 Upgrading a SQL Server Schema manually

The upgrade steps differ slightly depending on whether you are upgrading from Version 4.1.2 or 4.5. Refer to either [“Upgrading a SQL Server Schema Manually from 4.1.2 to 4.5.2”](#) or [“Upgrading a SQL Server Schema Manually from 4.5 to 4.5.2”](#) on [page 74](#).

C.3.3 Upgrading a SQL Server Schema Manually from 4.1.2 to 4.5.2

Follow these steps to upgrade a SQL Server schema

- 1 Copy the installation files from the e*Insight Installation CD to the e*Insight root directory.
- 2 Modify **ss_ex_defs.cmd**.
- 3 Run **eInsightUpgrade412_45.cmd**.
- 4 Modify **upgrader.cmd** and **Upgrader.properties**.
- 5 Run **upgrader.cmd**.
- 6 Run **eInsightUpgrade45_451.cmd**.
- 7 Run **eInsightUpgrade451_452.cmd**.

Step1: Copy the Installation Files to the e*Insight Root Directory

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

To copy the necessary files

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

```
CD:\setup\eInsight\database\sqlserver
```

The result will be:

```
\eInsight\sqlserver
```

Step 2: Modify `ss_ex_defs.cmd`

For the SQL Server database, you must modify `ss_ex_defs.cmd` with information specific to your site, and then run the upgrade script.

To modify `ss_ex_defs.cmd`

- 1 Open `\eInsight\sqlserver\ss_ex_defs.cmd` in any text editor.
- 2 Replace the default information as required.

For example:

```
:@setDbo
@set __USER=sa

:@setDboPassword
@set __PASSWORD=sa

:@setHost
@set __HOST=%COMPUTERNAME%

:@setDatabase
@set __DATABASE=eInsight

:@setISQLPath
@set __ISQLPATH=C:\MSSQL7\BINN\

:@setSchemaOwner
@set __SCHEMA_OWNER=ex_admin

:@setSchemaOwnerPassword
@set __SCHEMA_OWNER_PASSWORD=ex_admin

:@setDataLocation
@set __DATA_LOCATION=C:\MSSQL7\DATA
```

- 3 Save and close the file.

Step 3: Run `eInsightUpgrade412_45.cmd`

Once you have configured the parameters in `ss_ex_defs.cmd`, then you can run the `eInsightUpgrade412_45.cmd`.

To run the `eInsightUpgrade412_45.cmd` script

- 1 Follow the steps outlined in [“Step 2: Modify `ss_ex_defs.cmd`” on page 72](#).
- 2 Run `eInsightUpgrade412_45.cmd`.

Step 4: Modify upgrader.cmd and Upgrader.properties

The e*Insight database requires modifications to support expressions for 4.5.1. You need to make these changes using **upgrader.cmd** before the tables are updated to 4.5.1.

To modify upgrader.cmd

- 1 Open **\eInsight\oracle\upgrader.cmd** in any text editor.
- 2 This file defines the path for the e*Insight Integrator directory and the Java Runtime Environment bin directory. Replace the path information as required.

For example:

```
c:\eInsight\JRE\1.3\bin\java -cp  
c:\eInsight\integrator\workflow.jar;c:\eInsight\integrator\classes  
12.zip;c:\eInsight\integrator\DGbase.jar;c:\eInsight\integrator\DG  
util.jar; com.stc.bpms.test.Upgrader
```

Change the default paths shown in bold, if necessary.

- 3 Save and close the file.

To modify Upgrader.properties

- 1 Open **\eInsight\oracle\Upgrader.properties** in any text editor.
- 2 Replace the variables that start with **MY_**.

```
userID=MY_SCHEMA_OWNER_NAME  
password=MY_SCHEMA_OWNER_PASSWORD  
  
dbURL=jdbc:SeeBeyond:sqlserver://  
MY_MACHINE:1433;DatabaseName=MY_DBNAME;embedded=true  
DBServerType=SQLServer  
driverName=com.SeeBeyond.jdbc.sqlserver.SQLServerDriver
```

- 3 Save and close the file.

Step 5: Run upgrader.cmd

Once you have configured the parameters in **upgrader.cmd** and **Upgrader.properties**, then you can run the **upgrader.cmd** script.

To run the upgrader.cmd script

- 1 Follow the steps outlined in **“Step 4: Modify upgrader.cmd and Upgrader.properties” on page 73**.
- 2 Run **upgrader.cmd**.

Step 6: Run eInsightUpgrade45_451

Once you have configured the parameters in **ex_defs.sql**, then you can run the **eInsightUpgrade45_451.cmd** script.

To run the eInsightUpgrade45_451.cmd script

- 1 Follow the steps outlined in **“Step 2: Modify ss_ex_defs.cmd” on page 72**.
- 2 Run **eInsightUpgrade45_451.cmd**.

The database is now upgraded to 4.5.1.

Step 7: Run eInsightUpgrade451_452

Once you have configured the parameters in `ex_defs.sql`, then you can run the `eInsightUpgrade451_452.cmd` script.

To run the `eInsightUpgrade451_452.cmd` script

- 1 Follow the steps outlined in “[Step 2: Modify ss_ex_defs.cmd](#)” on page 72.
- 2 Run `eInsightUpgrade451_452.cmd`.

The database is now upgraded to 4.5.2.

C.3.4 Upgrading a SQL Server Schema Manually from 4.5 to 4.5.2

Follow these steps to upgrade a SQL Server schema

- 1 Copy the installation files from the e*Insight Installation CD to the e*Insight root directory.
- 2 Modify `ss_ex_defs.cmd`.
- 3 Run `eInsightUpgrade45_451.cmd`.
- 4 Run `eInsightUpgrade451_452.cmd`.

Step1: Copy the Installation Files to the e*Insight Root Directory

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

To copy the necessary files

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

```
CD:\setup\eInsight\database\sqlserver
```

The result will be:

```
\eInsight\sqlserver
```

Step 2: Modify ss_ex_defs.cmd

For the SQL Server database, you must modify `ss_ex_defs.cmd` with information specific to your site, and then run the upgrade script.

To modify `ss_ex_defs.cmd`

- 1 Open `\eInsight\sqlserver\ss_ex_defs.cmd` in any text editor.
- 2 Replace the default information as required.

For example:

```
:@setDbo
@set __USER=sa

:@setDboPassword
```

```
@set __PASSWORD=sa

:@setHost
@set __HOST=%COMPUTERNAME%

:@setDatabase
@set __DATABASE=eInsight

:@setISQLPath
@set __ISQLPATH=C:\MSSQL7\BINN\

:@setSchemaOwner
@set __SCHEMA_OWNER=ex_admin

:@setSchemaOwnerPassword
@set __SCHEMA_OWNER_PASSWORD=ex_admin

:@setDataLocation
@set __DATA_LOCATION=C:\MSSQL7\DATA
```

- 3 Save and close the file.

Step 3: Run eInsightUpgrade45_451

Once you have configured the parameters in `ex_defs.sql`, then you can run the `eInsightUpgrade45_451.cmd` script.

To run the `eInsightUpgrade45_451.cmd` script

- 1 Follow the steps outlined in [“Step 2: Modify ss_ex_defs.cmd” on page 72](#).
- 2 Run `eInsightUpgrade45_451.cmd`.

The database is now upgraded to 4.5.1.

Step 4: Run eInsightUpgrade451_452

Once you have configured the parameters in `ex_defs.sql`, then you can run the `eInsightUpgrade451_452.cmd` script.

To run the `eInsightUpgrade451_452.cmd` script

- 1 Follow the steps outlined in [“Step 2: Modify ss_ex_defs.cmd” on page 72](#).
- 2 Run `eInsightUpgrade451_452.cmd`.

The database is now upgraded to 4.5.2.

C.4 Upgrading a Sybase Schema

This section describes how to upgrade a Sybase database for e*Insight from Version 4.5 or 4.5.1 to 4.5.2. This can be achieved either by the InstallShield wizard or by manually running the upgrade scripts.

C.4.1 Upgrading a Sybase using the InstallShield Wizard

- 1 Log in to the machine running the DBMS.
- 2 Insert the installation CD into the CD-ROM drive.
If Autorun is enabled, the setup program automatically starts. Otherwise:
 - ♦ On the task bar, click the **Start** button, and then click **Run**.
 - ♦ In the **Open** field, type **D:\setup\setup.exe** where **D:** is your CD-ROM drive.
- 3 Follow the online prompts through the **Welcome**, **Software License Agreement**, and **Information** dialog boxes.
- 4 When the **User Information** dialog box appears, enter the name of the user and company for which this software is installed, and then click **Next**.
- 5 In the **Please choose the product to install** dialog box, select the **e*Insight Business Process Manager** check box, and then click **Next**.

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

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

- 6 In the **Check Setup Information** dialog box, confirm that the **e*Insight** component has been selected, and then click **Next**.
This launches the **e*Insight** portion of the setup wizard.
- 7 Follow the online prompts through the **Welcome**, **Software License Agreement**, and **Information** dialog boxes.
- 8 In the **User Information** dialog box, enter the name of the user and company for which this software is installed, and then click **Next**.
- 9 In the **Choose Destination Location** dialog box, click **Browse** to change the destination folder if needed, and click **Next** to continue.
- 10 In the **Select Components** dialog box, select the **Update or Create New e*Insight Database** check box. Make sure that the other check boxes are *not* selected.
- 11 Click **Next**.
The **Check Setup Information** dialog box appears.
- 12 In the **Check Setup Information** dialog box, review the installation information for the e*Insight database components, and then click **Next**.
- 13 In the **Select Database Server to support e*Insight** dialog box, select **Sybase**, and then click **Next**.
- 14 In the **Sybase Specific Info** dialog box, enter the **Host** and **Database**, and then click **Next**.
- 15 In the **Data Location Information** dialog box, enter your data location, and then click **Next**.

- 16 In the **Database Administrator Information** dialog box, enter an Administrator Username and Password, and then click **Next**.
- 17 In the **Database Schema Owner Information** dialog box, enter an Owner and Password, and then click **Next**.
- 18 If a previous version of an e*Insight database exists you are prompted to upgrade. Click **Yes** to continue.
- 19 An information message appears to show that the script has been launched successfully. Click **OK**.
- 20 In the **Setup Complete** dialog box, click **Finish** to complete the e*Insight Database Schema installation.

C.4.2 Upgrading a Sybase Schema Manually from 4.5 to 4.5.2

The upgrade steps differ slightly depending on whether you are upgrading from Version 4.1.2 or 4.5. Refer to either “[Upgrading a Sybase Schema Manually from 4.5 to 4.5.2](#)” or “[Upgrading a Sybase Schema Manually from 4.5.1 to 4.5.2](#)” on page 78.

C.4.3 Upgrading a Sybase Schema Manually from 4.5 to 4.5.2

Follow these steps to upgrade a Sybase schema

- 1 Copy the installation files from the e*Insight Installation CD to the e*Insight root directory.
- 2 Modify `sy_ex_defs.cmd`.
- 3 Run `eInsightUpgrade45_451.cmd`.
- 4 Run `eInsightUpgrade451_452.cmd`.

Step 1: Copy the Installation Files to the e*Insight Root Directory

You can upgrade the e*Insight Sybase database from either the Client or the Server.

To copy the necessary files

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

```
CD:\setup\eInsight\database\sybase
```

The result will be:

```
\eInsight\sybase
```

Step 2: Modify `sy_ex_defs.cmd`

For the Sybase database, you must modify `sy_ex_defs.cmd` with information specific to your site, and then run the upgrade script.

To modify `sy_ex_defs.cmd`

- 1 Open `\eInsight\sqlserver\sy_ex_defs.cmd` in any text editor.

- 2 Replace the default information as required.

For example:

```
:@setDbo
@set __USER=sa

:@setDboPassword
@set __PASSWORD=password

:@setHost
@set __HOST=%COMPUTERNAME%

:@setDatabase
@set __DATABASE=eInsight

:@setISQLPath
@set __ISQLPATH=C:\SYBASE\BIN\

:@setSchemaOwner
@set __SCHEMA_OWNER=ex_admin

:@setSchemaOwnerPassword
@set __SCHEMA_OWNER_PASSWORD=ex_admin

:@setDataLocation
@set __DATA_LOCATION=C:\SYBASE\DATA
```

- 3 Save and close the file.

Step 3: Run eInsightUpgrade45_451.cmd

Once you have configured the parameters in `sy_ex_defs.cmd`, then you can run the `eInsightUpgrade45_451.cmd` script.

To run the `eInsightUpgrade45_451.cmd` script

- 1 Follow the steps outlined in [“To modify sy_ex_defs.cmd” on page 77](#).
- 2 Run `eInsightUpgrade45_451.cmd`.

Step 4: Run eInsightUpgrade451_452.cmd

Once you have configured the parameters in `sy_ex_defs.cmd`, then you can run the `eInsightUpgrade451_452.cmd` script.

To run the `eInsightUpgrade451_452.cmd` script

- 1 Follow the steps outlined in [“To modify sy_ex_defs.cmd” on page 77](#).
- 2 Run `eInsightUpgrade451_452.cmd`.

C.4.4 Upgrading a Sybase Schema Manually from 4.5.1 to 4.5.2

Follow these steps to upgrade a Sybase schema

- 1 Copy the installation files from the e*Insight Installation CD to the e*Insight root directory.
- 2 Modify `sy_ex_defs.cmd`.

- 3 Run **eInsightUpgrade451_452.cmd**.

Step 1: Copy the Installation Files to the e*Insight Root Directory

You can upgrade the e*Insight Sybase database from either the Client or the Server.

To copy the necessary files

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

```
CD:\setup\eInsight\database\sybase
```

The result will be:

```
\eInsight\sybase
```

Step 2: Modify sy_ex_defs.cmd

For the Sybase database, you must modify **sy_ex_defs.cmd** with information specific to your site, and then run the upgrade script.

To modify **sy_ex_defs.cmd**

- 1 Open **\eInsight\sqlserver\sy_ex_defs.cmd** in any text editor.
- 2 Replace the default information as required.

For example:

```
:@setDbo
@set __USER=sa

:@setDboPassword
@set __PASSWORD=password

:@setHost
@set __HOST=%COMPUTERNAME%

:@setDatabase
@set __DATABASE=eInsight

:@setISQLPath
@set __ISQLPATH=C:\SYBASE\BIN\

:@setSchemaOwner
@set __SCHEMA_OWNER=ex_admin

:@setSchemaOwnerPassword
@set __SCHEMA_OWNER_PASSWORD=ex_admin

:@setDataLocation
@set __DATA_LOCATION=C:\SYBASE\DATA
```

- 3 Save and close the file.

Step 3: Run eInsightUpgrade45_451.cmd

Once you have configured the parameters in **sy_ex_defs.cmd**, then you can run the **eInsightUpgrade45_451.cmd** script.

To run the `eInsightUpgrade45_451.cmd` script

- 1 Follow the steps outlined in [“To modify `sy_ex_defs.cmd`” on page 77](#).
- 2 Run `eInsightUpgrade451_452.cmd`.

Updating the e*Insight e*Gate Schemas from 4.1.1 to 4.1.2

This appendix describes how to update the e*Gate schemas created in 4.1.1 to 4.1.2.

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

Important: *If you are upgrading from 4.1.0 to 4.1.2, you must first run the install script to update the schemas from 4.1.0 to 4.1.1 before you run this utility. See “[Upgrading the e*Xchange Database Schemas from Version 4.1.0 to 4.1.1](#)” on page 95.*

D.1 Update 4.1.1 e*Insight e*Gate Schemas

If you are using eXchange in conjunction with e*Gate, **before** you upgrade from 4.1.1 to 4.1.2, you must run the **stcschemutil.exe** utility.

In previous versions of e*Gate, numerous files from the default schema were copied into user-defined schemas, creating unnecessary duplication. In version 4.1.2, when you create a new schema, the basic underlying files necessary to every schema physically remain inside the directory of the default schema. Only altered files and newly created files are stored inside the new schema directory structure on the hard drive.

The function of this utility is to prevent e*Gate from being able to use old 4.1.1 files in place of the updated 4.1.2 files.

D.1.1 Remove Old e*Gate Files:

Run this script to remove all old e*Gate files, so that e*Gate does not accidentally attempt to execute the old versions.

To remove old e*Gate files

- 1 Insert the installation CD into the CD-ROM drive.
- 2 From a command line prompt, navigate to the directory:

```
\setup\utils\bin\\
```

where *platform* is the platform on which you have e*Gate installed.

- 3 At the prompt type:

```
stcschemutil.exe -sd egate server path -remove
```

where *egate server path* is the path on your drive where e*Gate\Server is installed.

- 4 Press **Enter**.

Note: When *stcschemutil.exe* is run, it creates a log file containing the filenames that were renamed or removed. This file is called **stcschemutil.log** and can be found in the *egate\server\registry\repository* directory.

D.1.2 Rename Old e*Gate Files

In addition to the option of automatically deleting old e*Gate files, you can also save them, by renaming them. The rename function appends all e*Gate files that have not been modified with the new extension of .dis. This prevents e*Gate from using the old 4.1.1 files, in place of the 4.1.2 ones. This utility does not modify any user-defined or customized e*Gate files.

To rename old e*Gate files

- 1 Insert the installation CD into the CD-ROM drive.
- 2 From a command line prompt, navigate to the directory:

```
\setup\utils\bin\<platform>\
```

where *platform* is the platform on which you have e*Gate installed.

- 3 At the prompt type:

```
stcschemutil.exe -sd egate path -rename
```

where *egate path* is the path on your drive where e*Gate is installed.

- 4 Press **Enter**.

Note: When *stcschemutil.exe* is run, it creates a log file containing the filenames that were renamed or removed. This file is called **stcschemutil.log** and can be found in the *egate\server\registry\repository* directory.

D.1.3 Review the Log File

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

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

D.1.4 After the e*Gate Schema Upgrade

Once you have completed upgrading the e*Gate schemas, you can then run the upgrade for software. To install the e*Insight GUI see [“Installing the e*Insight GUI” on page 22](#). To install the e*Insight back end see [“Installing the e*Gate Schema for e*Insight” on page 25](#).

When you have completed the installation/upgrade of the software, see [“Upgrading the e*Xchange Database Schemas from Version 4.1.1 to 4.1.2” on page 84](#) for the next step in the process.

D.1.5 stcschemutil.exe Related Messages

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

Table 1 stcschemutil.exe Related Messages

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

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

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

Important: *If you are upgrading from 4.1.0 to 4.1.2, you must first run the install script to update the schemas from 4.1.0 to 4.1.1. See [“Upgrading the e*Xchange Database Schemas from Version 4.1.0 to 4.1.1”](#) on page 95.*

E.1 Installing the Upgrade

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

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

Important: *If you are upgrading from 4.1.0 to 4.1.2, you must first run the install script from 4.1.0 to 4.1.1. See [“Upgrading the e*Xchange Database Schemas from Version 4.1.0 to 4.1.1”](#) on page 95.*

E.1.1 Extract the Upgrade Files

To extract the upgrade files

- 1 Create a temp folder on a machine that has a connection to the e*Xchange database.
- 2 Using a decompression utility such as WinZip, decompress the files in the `\setup\applications\ex\database\Oracle\upgrade_scripts\upd_eX_ora_411_412.taz` file on the e*Xchange version 4.1.2 install CD.
- 3 Copy the uncompressed files to the folder you created in step 1.

E.1.2 Edit the Upgrade Files/Script

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

To edit the upgrade files

The file you edit depends on your operating system.

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

For either script do the following:

Open the update script appropriate to your operating system in a text editor. Change the environment variables in the upgrade script to match your implementation. Use Table 2 for more information on changing these variables.

Example: change the line

```
SET TNS_NAME=eXchange
```

to

```
SET TNS_NAME=yourdatabase
```

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

Table 2 Upgrade Script Environment Variables

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

To edit alter_database.sql

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

Where **temp** is the directory you created in [“Extract the Upgrade Files” on page 84](#).

- 2 Change the line:

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

```
define SCRIPT_HOME = \yourscripthome"
```

Where **“yourscripthome”** is the location where you copied the database upgrade scripts extracted from the e*Xchange installation CD in step [“Extract the Upgrade Files” on page 84](#).

To edit update_exchange.sql

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

Where **temp** is the directory you created in [“Extract the Upgrade Files” on page 84](#).

- 2 Change the line:

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

```
define SCRIPT_HOME = \yourscripthome"
```

Where **“yourscripthome”** is the location where you copied the database upgrade scripts extracted from the e*Xchange installation CD in step [“Extract the Upgrade Files” on page 84](#).

To edit tsp_defs.sql

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

Where **temp** is the directory you created in [“Extract the Upgrade Files” on page 84](#).

- 2 Change the lines:

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

to

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

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

Example:

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

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

E.1.3 Update the Tablespace Names

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

Important: *If you are upgrading from 4.1.1 to 4.1.2, you do **not** need to make these modifications, as the tablespace names are the same in 4.1.1 and 4.1.2. These steps are only applicable if you are upgrading from 4.1.0 to 4.1.2, and the 4.1.0 to 4.1.1 upgrade has been completed. See [“Upgrading the e*Xchange Database Schemas from Version 4.1.0 to 4.1.1” on page 95](#) for more information.*

To update to 4.1.2 when using the 4.1.0 tablespace names

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

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

Example:

```
-- STC ePM eXchange tablespace info

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

-- STC eBPM eXchange tablespace info

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

-----

-- STC ePM eXchange tablespace info

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

-- STC eBPM tablespace info

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

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

The following example illustrates these changes:

```
-- STC ePM eXchange tablespace info

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

-- STC eBPM eXchange tablespace info

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

-----

-- STC ePM eXchange tablespace info

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

-- STC eBPM tablespace info

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

- 4 Save and close the file.

E.1.4 Run the Update Script

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

To run the update script

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

The script displays “Update complete.” when finished.

E.1.5 Update Configuration Files

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

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

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

To update the configuration files

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

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

- 5 From the **Goto Parameter** list, select **Additional Path**, and then add the setting given in Table 3 to any existing path that might be there.
- 6 From the **Goto Section** list, select **General Settings**.
- 7 From the **Goto Parameter** list, select **Journal File Name**, and then type the file name, including path if desired, that you want to use for the journal file.

Note: If you do not specify a path, or if you specify a relative path, e*Xchange bases the path on the location at which the Participating Host is installed; for example, `c:\eGate\Client`.

- 8 Save the changes.
- 9 Repeat steps 1 through 7 for the eX_ePM_Ack_Monitor e*Way.
- 10 Repeat steps 1 through 4 for the HTTP e*Way.

- 11 Save the changes.

Table 3 Additional Configuration Settings

Section	Parameter	Addition to Setting
Monk Configuration	Auxiliary Library Directories	;monk_library/eXchange
Monk Configuration	Additional Path	;monk_scripts/templates/ROS;monk_scripts/templates/ROS/ROS_10;monk_scripts/templates/ROS/ROS_11;monk_scripts/common/BIZ

E.2 Using Business Processes Created in 4.1.1 in 4.1.2

In order to use files exported from 4.1.1 in 4.1.2, you must ensure that you have the proper Oracle files installed. Additionally, if you are migrating business processes between versions, via the export feature, you need to follow the steps outlined below.

E.2.1 Installing the Necessary Oracle File

In order to use 4.1.1 exported files (.dmp) with the 4.1.2 business process import/export functionality in the e*Insight component of the *SeeBeyond eBusiness Integration Suite*, you must ensure that the correct Oracle file, **oravsn8.dll**, is installed on the machine running the e*Insight GUI. The default installation of the 8.1.5 version of Oracle Client does not install this file.

To install oravsn8.dll

- 1 Navigate to the following directory on the Oracle Server installation CD:
stage\Components\Oracle\rdbms\8.1.5.0.0\1\DataFiles
- 2 Copy the file **liboes.0.0.jar** to a temporary location.
- 3 Extract the file **oravsn8.dll** from the **jar** file using WinZip or another extraction utility.
- 4 Copy the **oravsn.dll** file to the **<Oracle home>\bin** directory on the machine where the e*Insight GUI is installed.

E.2.2 Migrating Business Processes Between Versions

The database structure, which contains the information for the business process versions, activities, etc. has been modified in 4.1.2. Therefore, if you are going to be using business process created in 4.1.1, you need to follow one of the scenarios outlined below.

Using business processes created in 4.1.1 in 4.1.2

If you are going to be using business processes that were created in 4.1.1, in 4.1.2, all you need to do is run the upgrade script. See [“Upgrading the e*Xchange Database Schemas from Version 4.1.1 to 4.1.2” on page 84](#) for more information.

Importing business processes created in 4.1.1 to a 4.1.2 database with the same administrator user name

Follow the steps below if you are going to import business processes that were exported from, a 4.1.1 database, if both databases used the administrator user name.

Note: *The administrator user name is defined in the `user_defs.sql` file. See [“Modifying the ex_defs.sql Script” on page 37](#) for more information on this file.*

- 1 Update the database to 4.1.2. See [“Upgrading the e*Xchange Database Schemas from Version 4.1.1 to 4.1.2” on page 84](#).
- 2 Import the business processes into the new database.

Importing business processes created in 4.1.1 to a 4.1.2 database with a different administrator user name

Follow the steps below if you are going to import business processes that were exported from a 4.1.1 database, if both databases used different administrator user names.

Note: *The administrator user name is defined in the `user_defs.sql` file. See [“Modifying the ex_defs.sql Script” on page 37](#) for more information on this file.*

- 1 Update the database to 4.1.2. See [“Upgrading the e*Xchange Database Schemas from Version 4.1.1 to 4.1.2” on page 84](#).
- 2 Export the necessary business processes.
The business processes exported from the 4.1.2 database is in the new format (.xml).
- 3 Import the business processes into the new database.

E.3 Uninstalling the Existing e*Xchange Oracle Database

You can use this Oracle script to delete your existing Oracle schema if you want to install a clean database schema, instead of upgrading your current one.

Important: *Running this script causes irrevocable harm to your existing database. It should only be run if your intent is to completely uninstall the existing database with the intent of creating a new one. Two warning messages are displayed before the uninstall takes place.*

To uninstall the current e*Xchange database schema execute the following steps

- 1 Copy the uninstall files from the e*Xchange Installation CD to the e*Xchange root directory.
- 2 Modify the SQL statements with the specific information for your system.
- 3 Run the `ex_uninstall.sql` script in SQL*Plus to uninstall the schema.

E.3.1 Copy the Uninstall Files to the e*Xchange Root Directory

To copy the necessary files

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

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

The result will be:

```
\eXchange\Oracle
```

E.3.2 Modify SQL Statements

For the Oracle database, you must modify the following scripts with information specific to the schema you are uninstalling.

- ♦ `\eXchange\Oracle\ex_uninstall.sql`
- ♦ `\eXchange\Oracle\user_defs.sql`

To modify `ex_uninstall.sql`

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

For example:

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

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

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

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

Note: In UNIX you can omit the drive designation.

- 3 Save and close the file.

To modify `user_defs.sql`

- 1 Open `\eXchange\Oracle\user_defs.sql` in any text editor.

- 2 Under **TNS NAME**, replace the default information with the TNS (database) name for the Oracle instance which you are deleting.

For example:

```
REM specify the TNS name of the Oracle instance to connect with
REM Use the following line for release
```

```
define TNS_NAME=exchange
```

If you have created a database called "Oracle1," the information should be changed to:

```
define TNS_NAME=Oracle1
```

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

For example:

```
-- STC eXchange ePM User Info
```

```
define ADMIN_NAME = "ex_admin"
```

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

To change the password for logging into the database specified under **TNS_NAME** to "Oracle_password" change the file to read:

```
define ADMIN_NAME = "ex_admin"
define ADMIN_PW = "Oracle_password"
```

Important: The **ADMIN_NAME**, *ex_admin*, is part of the default scripts and cannot be changed.

- 4 Save and close the file.

E.3.3 Running the ex_uninstall.sql Script

Important: You must be logged in to the system account for the Oracle database before running the uninstall script.

To run the **ex_uninstall.sql** script

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

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

where

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

For example:

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

- 3 Press **Enter**.

A warning message is displayed, as shown below:

```
WARNING: This will COMPLETELY DESTROY your e*Xchange installation
and you'll lose ALL your enterprise's Business Process data!
Are you sure you want to proceed? If not, abort by pressing Ctrl-C
now!
```

```
Press Enter to continue with the UnInstall;otherwise press Ctrl-C.
```

- 4 Press Enter to continue, or Ctrl+c to cancel.

The second warning message is displayed as shown below:

```
ARE YOU SURE??? Press Ctrl-C if you're NOT!!!
```

```
Press Enter to continue with the UnInstall;otherwise press Ctrl-C.
```

- 5 Press Enter to continue, or Ctrl+c to cancel.

The process of deleting the schema begins.

Note: *Once the schema has been deleted, see [“Creating the e*Insight Database Schema—Oracle” on page 33](#) for information on installing a new Oracle schema.*

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

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

Important: *If you are upgrading from 4.1.0 to 4.1.2, you must first run the install script from 4.1.0 to 4.1.1. Once you have completed this upgrade, see “[Upgrading the e*Xchange Database Schemas from Version 4.1.1 to 4.1.2](#)” on page 84.*

F.1 Installing the Upgrade

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

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

F.1.1 Extract the Upgrade Files

To extract the upgrade files

- 1 Create a folder on a machine that has a connection to the e*Xchange database.
- 2 Using a decompression utility such as WinZip, decompress the files in the `\setup\applications\ex\database\Oracle\upgrade_scripts\upd_eX_ora_410_411.taz` file on the e*Xchange version 4.1.1 install CD.
- 3 Copy the uncompressed files to the folder you created in step 1.

F.1.2 Edit the Upgrade Files/Script

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

To edit the update script

The file you edit depends on your operating system.

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

For either script do the following:

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

Example: change the line

```
SET TNS_NAME=eXchange
```

to

```
SET TNS_NAME=yourdatabase
```

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

Table 4 Upgrade Script Environment Variables

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

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

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

Change the line:

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

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

where `c:\` is the drive where you created the folder in which to extract the files from the e*Xchange installation CD.

where `"yourscripthome"` is the location where you copied the database upgrade scripts extracted from the e*Xchange install CD.

To edit `tsp_defs.sql`

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

Change the lines

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

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

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

F.1.3 Run the Update Script

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

To run the update script

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