

SeeBeyond ICAN Suite

SeeBeyond ICAN Suite Upgrade Guide

Release 5.0



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Introduction

Welcome to the *SeeBeyond ICAN Suite Upgrade Guide*. This document includes information about upgrading to the SeeBeyond® Integrated Composite Application Network (ICAN) Suite™.

This chapter includes

- [“Organization of Information” on page 6](#)
- [“Intended Audience” on page 7](#)
- [“Writing Conventions” on page 7](#)
- [“Supporting Documents” on page 8](#)
- [“Online Documents” on page 8](#)
- [“The SeeBeyond Web Site” on page 8](#)

1.1 Organization of Information

This document provides information about upgrading to eGate Integrator 5.0 and includes the following chapters:

- **Chapter 1 “Introduction”** describes the purpose of the *SeeBeyond ICAN Suite Upgrade Guide* including writing conventions and a list of related documents.
- **Chapter 2 “Upgrading e*Gate 4.x”** describes the available options for current e*Gate 4.x customers wishing to upgrade to eGate version 5.0.
- **Chapter 3 “Upgrading eInsight”** describes the available options for current e*Insight 4.x customers wishing to upgrade to eInsight version 5.0.
- **Chapter 4 “Upgrading eIndex”** describes the available options for current e*Index 4.x customers wishing to upgrade to eIndex version 5.0.
- **Chapter 5 “Upgrading e*Gate 3.6.2”** describes the available options for current e*Gate 3.6.2 customers wishing to upgrade to eGate version 5.0.
- **Chapter 6 “Using New ICAN Suite Products”** describes the new products that will be available to users after they upgrade to the SeeBeyond ICAN Suite version 5.0.
- **Chapter A “Changes to Monk”** describes the changes to the behavior of the Monk environment after installing the Schema Runtime Environment.

In addition, refer to the [Glossary](#) on page 38 for a list of eGate-related terminology.

Note: e*Gate 4.x terms and their eGate 5.0 equivalents are listed in [Table 3 on page 41](#).

1.2 Intended Audience

This guide is intended for experienced PC users who have the responsibility of helping to set up and maintain a fully functioning ICAN Suite system. This person must also understand any operating systems on which eGate will be installed (Windows or UNIX) and must be thoroughly familiar with Windows-style GUI operations.

1.3 Writing Conventions

The following writing conventions are observed throughout this document.

Table 1 Writing Conventions

Text	Convention	Example
Button, file, icon, parameter, variable, method, menu, and object names.	Bold text	<ul style="list-style-type: none"> ▪ Click OK to save and close. ▪ From the File menu, select Exit. ▪ Select the logicalhost.exe file. ▪ Enter the timeout value. ▪ Use the getClassName() method. ▪ Configure the Inbound File eWay.
Command line arguments and code samples	Fixed font. Variables are shown in <i>bold italic</i> .	<code>bootstrap -p <i>password</i></code>
Hypertext links	Blue text	For more information, see "Writing Conventions" on page 7 .

Additional Conventions

Windows Systems

For the purposes of this guide, references to "Windows" will apply to Microsoft Windows Server 2003, Windows XP, and Windows 2000.

Path Name Separator

This guide uses the backslash ("\\") as the separator within path names. If you are working on a UNIX system, please make the appropriate substitutions.

1.4 Supporting Documents

For more information about the ICAN Suite, refer to the following documents:

- *eGate Integrator Installation Guide*
- *eGate Integrator Release Notes*
- *eGate Integrator Tutorial*
- *eGate Integrator User's Guide*
- *eGate Integrator JMS Reference Guide*
- *SeeBeyond ICAN Suite Deployment Guide*
- *SeeBeyond ICAN Suite Primer*

For a complete list of ICAN-related documentation, consult the *SeeBeyond ICAN Suite Primer*. For information on a specific add-on product (for example, an eWay Intelligent Adapter), see the User's Guide for that product.

1.5 Online Documents

The documentation for the SeeBeyond ICAN Suite is distributed as a collection of online documents. These documents are viewable with the Acrobat Reader application from Adobe Systems. Acrobat Reader can be downloaded from:

<http://www.adobe.com>

1.6 The SeeBeyond Web Site

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

<http://www.seebeyond.com>

Upgrading e*Gate 4.x

This chapter describes the options available for e*Gate 4.x customers upgrading to eGate 5.0.

Note: For information on upgrading e*Gate 3.6.2 systems, see [Chapter 5 “Upgrading e*Gate 3.6.2” on page 30](#).

This chapter contains

- [“eGate 5.0 Upgrade Overview” on page 9](#)
- [“Benefits of Upgrading to eGate 5.0” on page 12](#)
- [“Upgrade Procedure” on page 13](#)
- [“Post-Upgrade Deployment Strategies” on page 16](#)

2.1 eGate 5.0 Upgrade Overview

e*Gate 4.x customers integrate their 4.x systems with eGate 5.0 by installing the Schema Runtime Environment (SRE). Installing the SRE upgrades an e*Gate 4.x system to the eGate 5.0 Schema Runtime Environment.

2.1.1. Schema Runtime Environment Upgrade

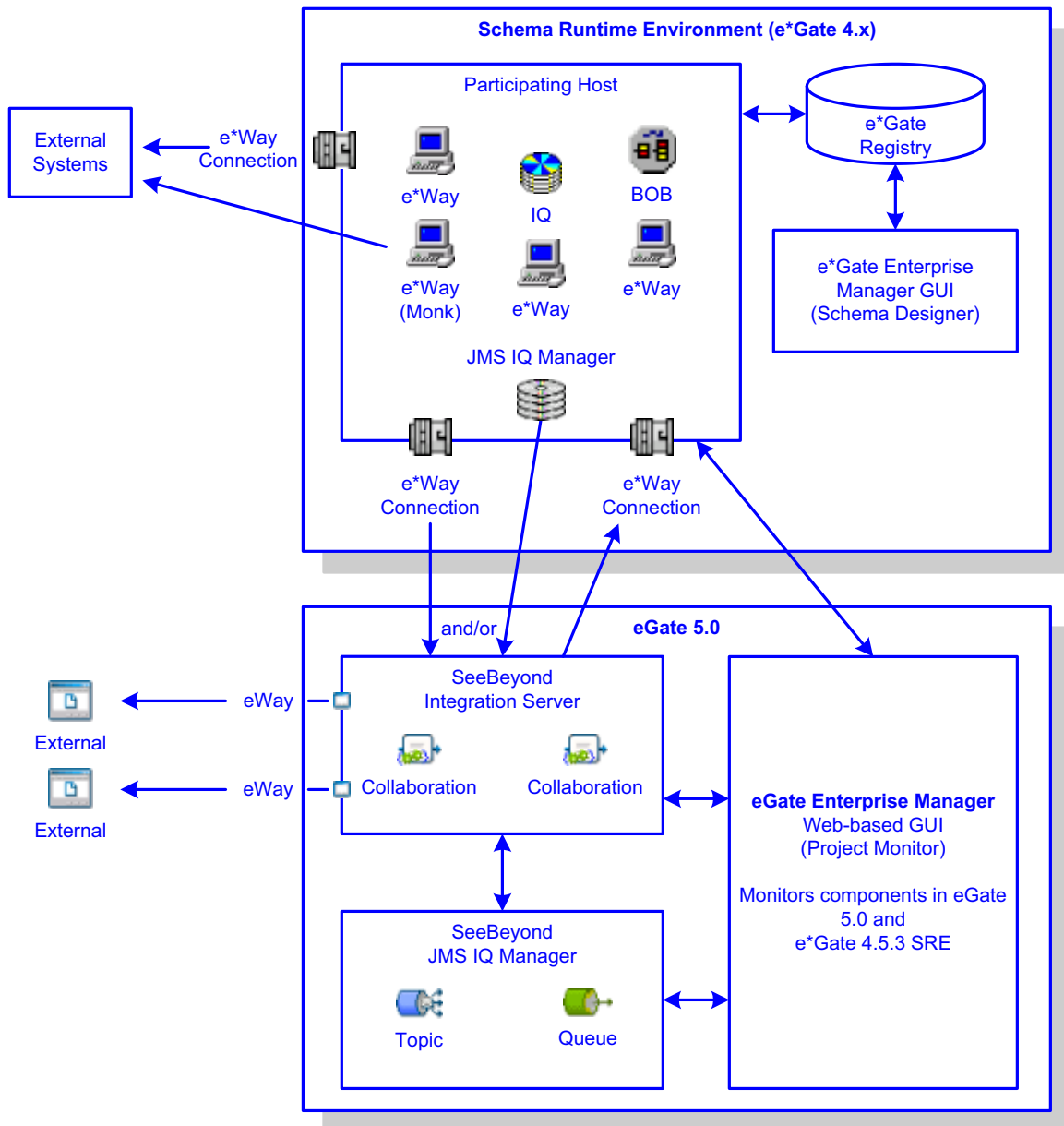
The Schema Runtime Environment upgrades e*Gate version 4.x systems to take advantage of eGate 5.0 tools, such as the monitoring features in the Enterprise Manager web-based GUI.

The Schema Runtime Environment (SRE) makes it possible for existing e*Gate Schemas to interact directly with the SeeBeyond JMS IQ Manager. This makes it possible for e*Gate 4.x Collaborations to publish and subscribe to eGate 5.0 JMS IQ Managers. Similarly, eGate 5.0 Collaborations can publish and subscribe to e*Gate 4.x Schemas running in the SRE. This inter-connectivity is achieved when eGate 5.0 Projects and e*Gate 4.x Schemas (running in the SRE) publish and subscribe to each other’s message services. This inter-operability can be established without re-writing existing Java and Monk Collaborations.

Figure 1 and Figure 2 illustrate the two ways Projects and Schemas can interface with a common message service. In the first example, eGate 5.0 components publish and subscribe to the e*Gate 4.5.x JMS server running in the Schema Runtime Environment.

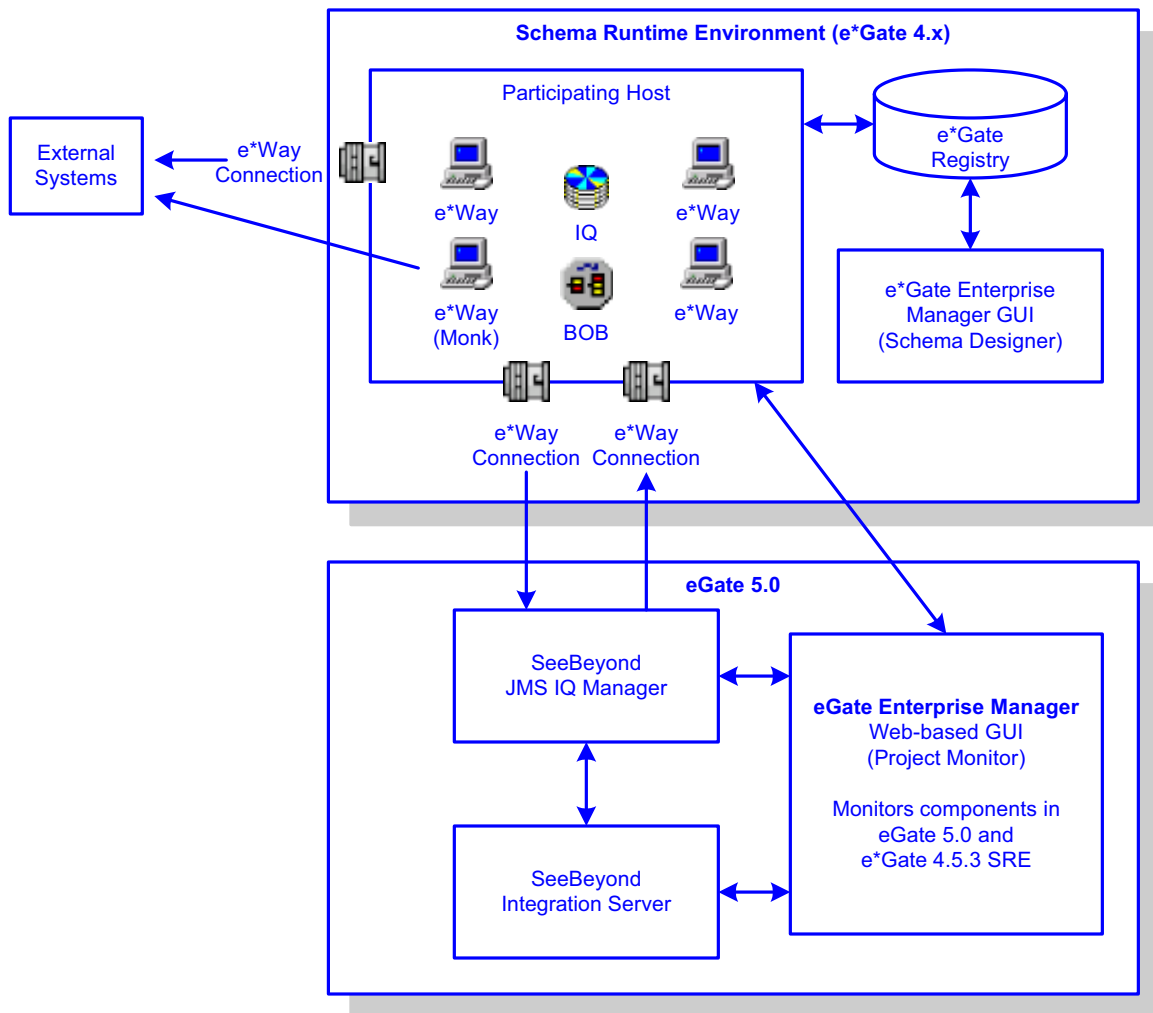
Note that the SRE components can publish messages to eGate 5.0 either through e*Way Connections or directly via the SRE JMS server. However, the eGate 5.0 components can only publish to the SRE by using an e*Way Connection; the eGate 5.0 components can not publish messages directly to the SRE JMS server.

Figure 1 eGate 5.0 Interfacing with the e*Gate 4.5.x JMS Server



In the second example (see Figure 2), components in the e*Gate 4.5.x SRE publish and subscribe to the eGate 5.0 JMS IQ Manager through the use of e*Way Connections. These e*Way Connections provide a bidirectional flow between Projects and Schemas.

Figure 2 e*Gate 4.5.x Interfacing with the eGate 5.0 JMS IQ Manager



Although either of these scenarios provide similar functionality, it is generally recommended to configure the eGate 5.0 Projects to publish and subscribe to the SRE environment (as shown in [Figure 1 on page 10](#)).

For more information on how to configure Projects and Schemas to use a common message service, see [“Post-Upgrade Deployment Strategies” on page 16](#).

General Features of the SRE

Figure 1 and Figure 2 show how e*Gate 4.x components running in the Schema Runtime Environment interact with an eGate 5.0 system.

- Components on the Participating Host in the SRE interact with each other and with external systems with the same functionality that existed prior to upgrading.
- The Schema Runtime Environment upgrade includes the familiar GUIs and editors that were used to create the Schema components in e*Gate 4.x.
- Components running in the SRE can be monitored via the eGate 5.0 browser-based Enterprise Manager. The Enterprise Manager displays the status of the components

running in the SRE. Additionally, users can start and stop components using the control features of the eGate 5.0 Enterprise Manager.

SRE Supported Platforms

The Schema Runtime Environment upgrade for eGate 5.0 is supported on the following operating systems:

- Windows XP and Windows 2000 SP2 and SP3
- Solaris 8 and 9
- AIX 5.1 and 5.2
- HP-UX 11 and 11i (RISC)
- HP Tru64 V5.1A
- Red Hat Linux Advanced Server 2.1 (Intel)

2.2 Benefits of Upgrading to eGate 5.0

Upgrading to eGate 5.0 provides improved monitoring capabilities and enables Schema/Project integration. Additionally, customers using all of the products in the SeeBeyond ICAN Suite, such as eInsight and eXchange, will enjoy the benefits of the tight integration between all products in the version 5.0 suite.

For a complete list of enhancements in eGate 5.0, see the SeeBeyond web site at:

<http://www.seebeyond.com>

2.2.1. Improved Monitoring

The eGate 5.0 Enterprise Manager provides enhanced monitoring functionality of Project and Schema components. For example, the Enterprise Manager displays the number of messages waiting for any given component.

2.2.2. Schema and Project Integration

The Schema Runtime Environment makes it possible for:

- e*Gate 4.x components to publish to and subscribe from eGate 5.0 Projects.
- eGate 5.0 components to publish to and subscribe from e*Gate 4.x Schemas.

See [Figure 2 on page 11](#) for an illustration of the interaction between the e*Gate 4.x Schema running within the Schema Runtime Environment and the e*Gate 5.0 enterprise.

2.3 Upgrade Procedure

To upgrade your e*Gate 4.x Schemas to eGate 5.0, perform the steps described on the following pages:

- 1 [“Upgrade 4.x Components” on page 13](#)
- 2 [“Register the Components with the 5.0 Repository” on page 14](#)
- 3 [“Connect Schema Components to Projects” on page 14](#)
- 4 [“Connect Project Components to Schemas” on page 15](#)
- 5 [“Manage all Components with the 5.0 Enterprise Manager” on page 15](#)

For more information on how to configure Projects and Schemas to use a common message service, see [“Post-Upgrade Deployment Strategies” on page 16](#).

2.3.1. Upgrade 4.x Components

Upgrading the e*Gate 4.x components is achieved by installing the Schema Runtime Environment. Install the SRE upgrade on your e*Gate 4.x Registry Host and Participating Hosts.

The SRE installation program:

- Installs the e*Gate 4.5.3 program files, such as the Enterprise Manager GUI.
- Upgrades all of your existing components to be compatible with e*Gate 4.5.3.
- Installs all of the add-on program files including all of the e*Ways and libraries licensed for your enterprise.

Pre-Installation Steps

Prior to installing the Schema Runtime Environment upgrade, you must complete the following steps:

- 1 Verify that your servers meet the requirements specified in [“SRE Supported Platforms” on page 12](#).
- 2 Analyze all Schemas to determine what add-on products are installed. This will be critical when upgrading the add-ons in step 4 of the [“Installation Steps”](#) procedure.
- 3 Check for sufficient disk space to run the upgrade installation.
- 4 Export all Schemas from the e*Gate Registry and backup the export files.
- 5 Shut down all publishing Collaborations and allow the subscribing Collaborations to empty all queues.
- 6 Create a backup of your entire e*Gate 4.x system to be used in case the upgrade process is interrupted.

Installation Steps

Depending on the number of SeeBeyond Business Integration Suite™ products, add-ons, and libraries used by your environment, there can be as many as twelve CD-ROMs for your Schema Runtime Environment upgrade disc set.

The process of installing the Schema Runtime Environment upgrade includes these high-level steps:

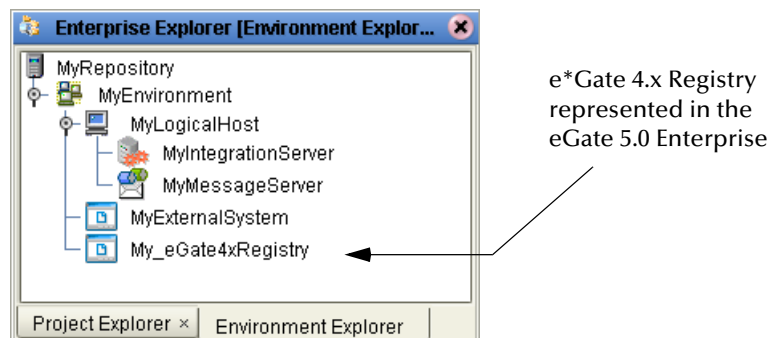
- 1 Install the Registry Host upgrade found on **e*Gate Integrator SRE Disc 1** on the Registry Host.
- 2 Install the Participating Host upgrade found on **e*Gate Integrator SRE Disc 1** on all Participating Hosts.
- 3 Install the e*Gate GUI upgrade found on **e*Gate Integrator SRE Disc 2** on all machines using the ETD Editor and Collaboration Editor GUIs.
- 4 Install the appropriate add-on upgrades found on **e*Gate Add-ons/Samples Discs 1 through 5, UN/EDIFACT Templates Discs 1 and 2, and X12 Templates Disc1 through 3** on the appropriate Participating Hosts.

2.3.2. Register the Components with the 5.0 Repository

In the eGate 5.0 Enterprise Designer, register your e*Gate Registry with the eGate 5.0 Repository.

- Add your Registry to the Production Environment as shown in the following figure.
- Configure the Registry with the appropriate version number, host name, and port number.

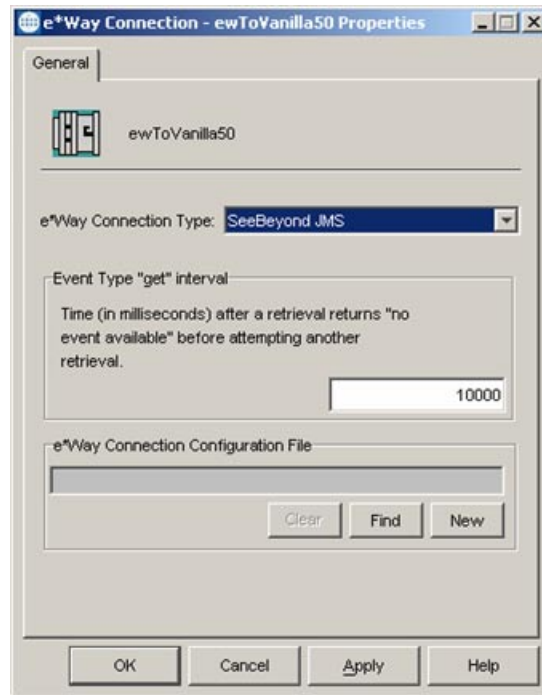
Figure 3 Register the SRE Schema in the Enterprise Designer



2.3.3. Connect Schema Components to Projects

To configure e*Gate 4.x Schemas to publish to and subscribe from eGate 5.0 Projects, add publishing and subscribing e*Way Connections to the Schema. Configure the e*Way Connections to point to the SeeBeyond JMS IQ Manager in the eGate 5.0 Project.

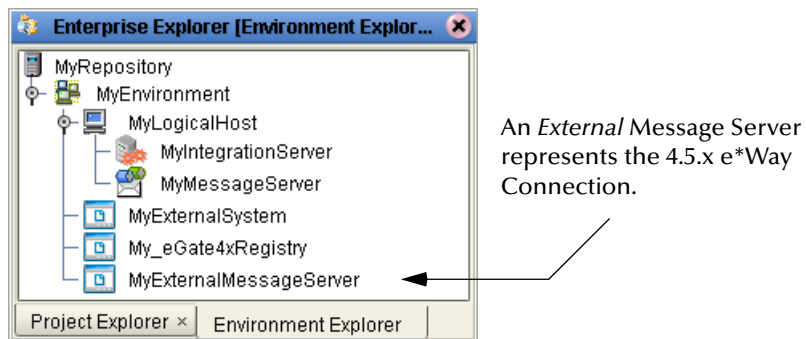
Figure 4 e*Way Connection



2.3.4. Connect Project Components to Schemas

To configure eGate 5.0 Projects to publish to and subscribe from e*Gate 4.x Schemas, add the e*Gate Schema as an *External Message Server* in the Production Environment.

Figure 5 External Message Server

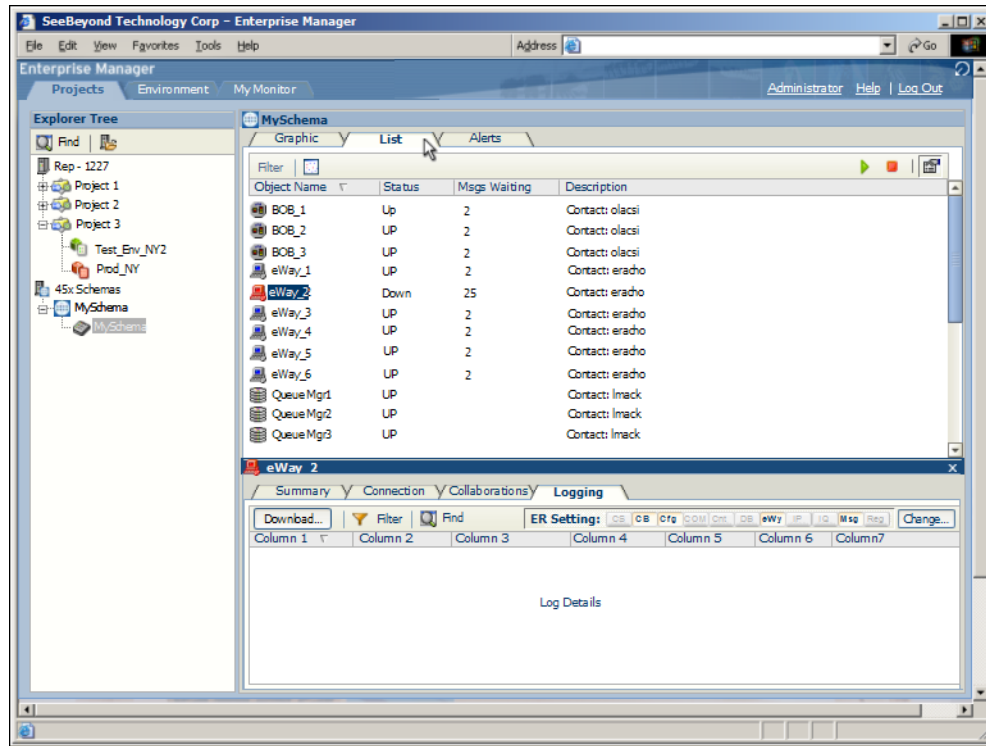


For additional configuration options, see [“Post-Upgrade Deployment Strategies” on page 16.](#)

2.3.5. Manage all Components with the 5.0 Enterprise Manager

Use the eGate 5.0 Enterprise Manager to monitor and control the e*Gate 4.x components running in the Schema Runtime Environment.

Figure 6 e*Gate 4.x Components in the Enterprise Manager



2.4 Post-Upgrade Deployment Strategies

After installing the Schema Runtime Environment upgrade, you will need to decide how you want to publish and subscribe to messages between the SRE Schema and the eGate 5.0 Project. The two strategies are illustrated in [Figure 1 on page 10](#) and [Figure 2 on page 11](#). The main difference between the two strategies is the location of the common message server.

- Figure 1 shows a JMS server running in the SRE. The JMS server is the host for any common messages that are exchanged between the two environments. As the figure shows, the eGate 5.0 Project components can publish and subscribe to topics and queues in the SRE JMS server *or* the eGate 5.0 JMS IQ Manager.
- Figure 2 shows components in the SRE Schema publishing and subscribing to the eGate 5.0 JMS IQ Manager through e*Way Connections. Similarly, the e*Gate 4.x components can publish and subscribe to topics and queues in the SRE JMS server *or* the eGate 5.0 JMS IQ Manager.

2.4.1. Publishing and Subscribing to Messages as Bytes

e*Gate 4.x publishes and subscribes to messages—or Events—as *byte* messages. But by default, eGate 5.0 publishes and subscribes to messages as *text* messages. To successfully exchange messages between the SRE Schema and the eGate 5.0 Project, all

messages being exchanged between environments must be converted to byte messages. eGate 5.0 messages are converted to byte messages by using the **ByteMessage** method in the JMS OTD. For more information on the **ByteMessage** method and the JMS OTD, see the *eGate Integrator JMS Reference Guide*.

Note that this does not mean that *all* messages must be converted; only the eGate 5.0 messages that will be exchanged with SRE Schemas need to be converted. Any eGate 5.0 messages that will not be exchanged with SRE Schemas do not need to be converted to byte messages.

2.4.2. 5.0 Collaborations Publishing and Subscribing to 4.5.x JMS Server

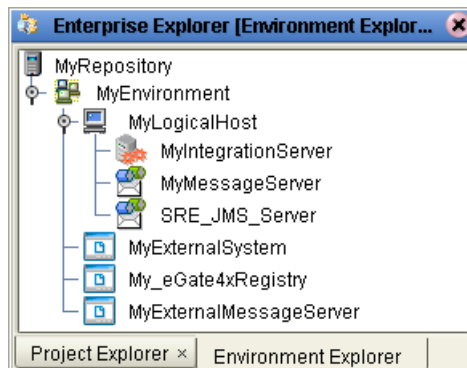
Figure 1 on page 10 illustrates the relationship between an eGate 5.0 Project and a JMS server (JMS IQ Manager) running in the Schema Runtime Environment. In most cases, this will be the preferred deployment strategy, because it requires little change to the 4.5.x Schema.

This deployment strategy involves adding a second Message Server to your eGate 5.0 Project, configuring this Message Server to point to the SRE JMS server, and naming your topics and queues to correspond with the appropriate Event Types in the SRE Schema.

Configuring the Message Server

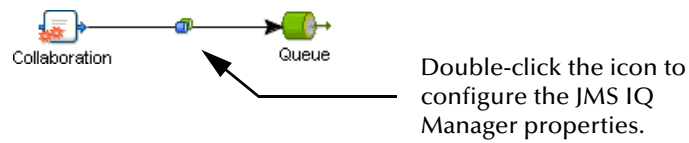
Configuring an eGate 5.0 Project to publish and subscribe to an e*Gate 4.5.x JMS server requires a second Message Server in the eGate Project. The first (default) Message Server manages message queuing for Project components publishing and subscribing to other components within the eGate 5.0 Project. The second Message Server manages the message traffic between the Project components and the 4.5.x JMS server running in the SRE.

Figure 7 SRE JMS Server



The JMS IQ Manager must be configured to use the JMS server running in the Schema Runtime Environment. To configure the JMS IQ Manager properties, double-click the JMS IQ Manager Properties icon in the Connectivity Map.

Figure 8 JMS IQ Manager Properties Icon

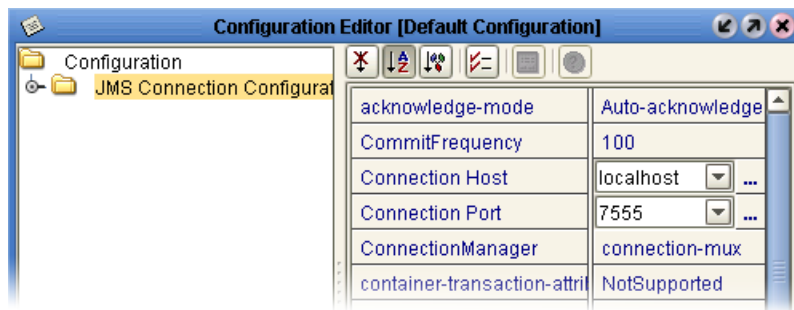


Enter the appropriate information in the following fields (see Figure 9):

- **Connection Host:** The TCP/IP host name (machine name) of the SRE Participating Host running the JMS server.
- **Connection Port:** The port number of the JMS server.

Repeat this process for each of the components that will publish or subscribe to the SRE JMS server.

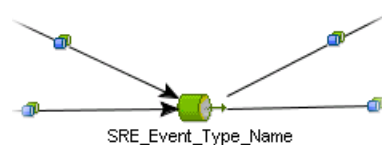
Figure 9 JMS IQ Manager Properties



Naming the Queue or Topic

In order for Collaborations in the SRE to recognize the messages published by the Project components, you must configure the queues (or topics) in the 5.0 Project to use the same name as the Event Types that the Collaborations subscribe to. If the Schema's Collaborations use multiple Event Types, then you will need to add multiple queues or topics with corresponding names.

Figure 10 Event Type Name



Using Topics

Since topics are non-durable, it is possible for messages to be lost if the publishing and subscribing Collaborations are not both running when the messages are published to the topic. To prevent message loss, the subscribing Collaborations must be started before the publishing Collaborations are started.

Important: When using topics, all of the subscribing components in the Project and Schema must be running before the publishing components are started. Any messages published before the subscribers are running will be lost.

2.4.3. 4.5.x Components Publishing and Subscribing to 5.0 JMS IQ Manager

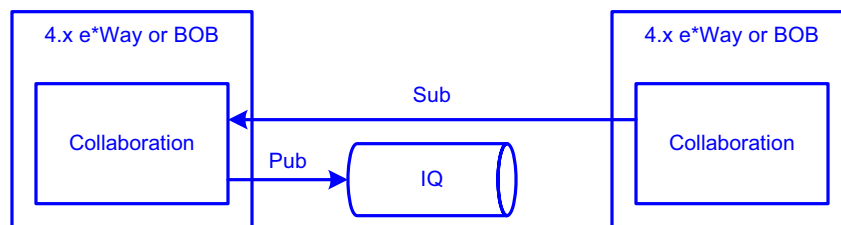
Figure 2 on page 11 illustrates the relationship between an e*Gate 4.x Schema running in the SRE connecting to an eGate 5.0 JMS IQ Manager. Although this deployment option provides full and robust exchange of messages between the two environments, it is not as desirable as the previous strategy when the existing e*Gate Schema has many Collaborations. The main disadvantage to this option is that the publication and subscription settings must be manually re-configured for any messages going to or from the eGate 5.0 JMS IQ Manager.

One additional consideration is the type of queues used in the existing 4.5.x Schema. JMS IQs and Standard IQs use a different approach to connecting to the eGate 5.0 JMS IQ Manager than the JMS e*Way Connections do.

Configuring JMS IQs and Standard IQs

In e*Gate 4.5.x, JMS IQs and Standard IQs subscribe to Events in an IQ published by a specific Collaboration.

Figure 11 e*Gate 4.x Publications and Subscriptions

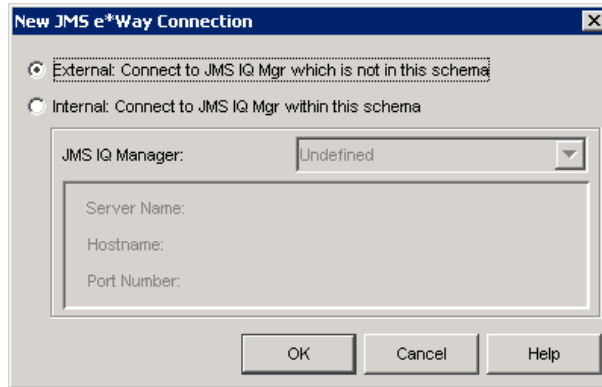


Messages published by eGate 5.0 Collaborations do not contain the information about the publisher that the 4.x Collaborations require as subscribers. To overcome this, you must add a Business Object Broker (BOB) to the Schema. This BOB can use an e*Way Connection to connect to the JMS IQ Manager as an external system. When the BOB enqueues the messages, it will create properly formed e*Gate Events that can be subscribed to by 4.x Collaborations running in the SRE Schema.

As Figure 2 on page 11 shows, the BOB uses two e*Way Connections—one inbound and one outbound—to establish a bidirectional flow with the 5.0 JMS IQ Manager.

When configuring the inbound and outbound e*Way Connections, specify that the e*Way Connection uses an external JMS server as shown in the following figure.

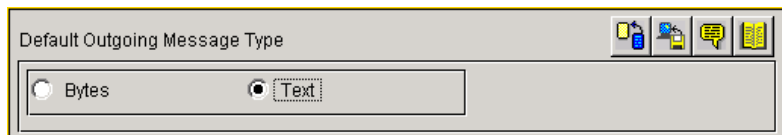
Figure 12 e*Way Connection External JMS



Messages in eGate 5.0 are not the same data type as e*Gate 4.5.x messages. Messages in eGate 5.0 are text messages, while e*Gate 4.5.x messages are byte arrays. To ensure that the 4.5.x messages can be read, all outbound e*Way Connections must be configured to publish messages as text.

In the **General Settings** section of the configuration file for the outbound e*Way connections, set the **Default Outgoing Message Type** to **Text**. This ensures that the outbound e*Way Connections publish the messages in a data type that is compatible with eGate 5.0.

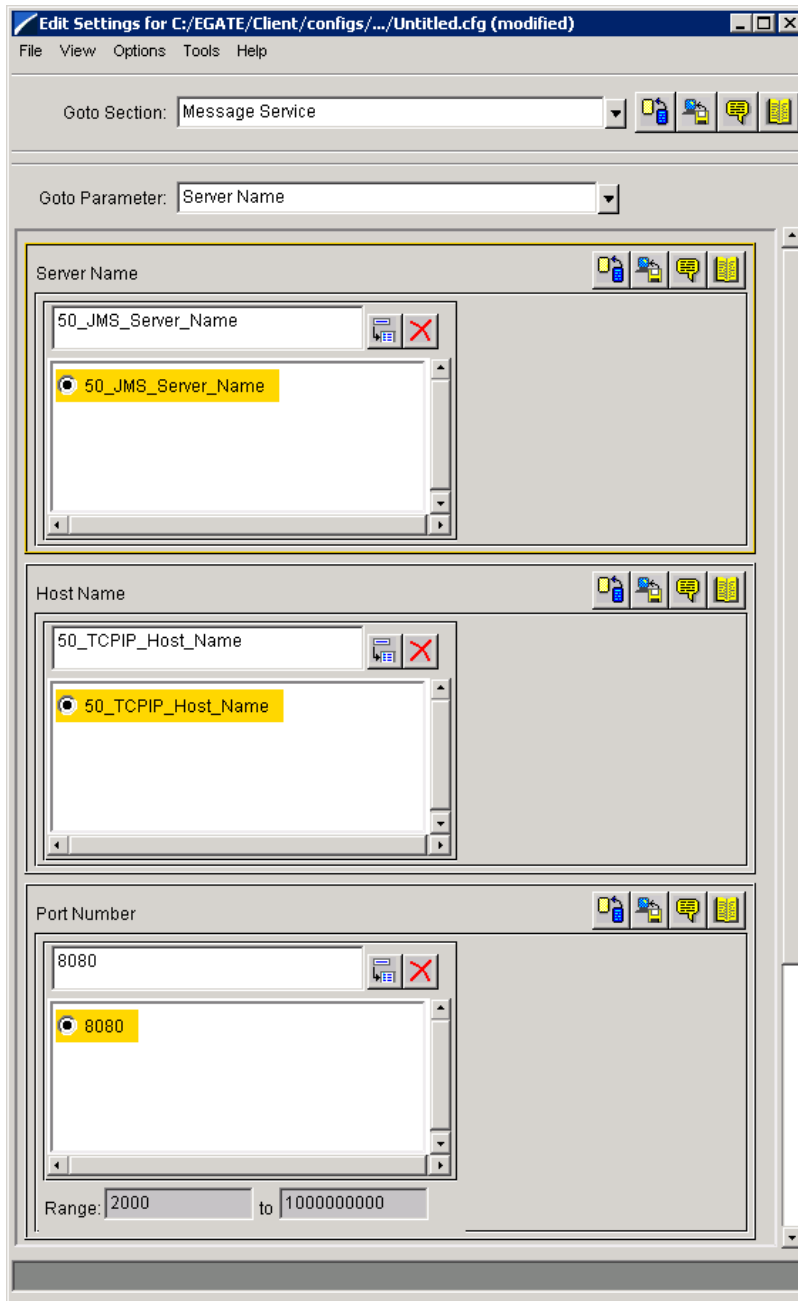
Figure 13 Outbound e*Way Connections Publish Text



In the **Message Service** section of the configuration file for the inbound and outbound e*Way Connections (see Figure 14), enter the appropriate information corresponding to the eGate 5.0 JMS IQ Manager:

- **ServerName:** The JMS name of the SeeBeyond JMS IQ Manager. This is not always the same as the JMS IQ Manager's machine name.
- **HostName:** The TCP/IP host name (or machine name) of the JMS IQ Manager.
- **PortNumber:** The port number of the JMS IQ Manager.

Figure 14 e*Way Connection Configuration File



Configuring JMS e*Way Connections

Collaborations using JMS e*Way Connections as a messaging service can interface with the eGate 5.0 JMS IQ Manager by using an e*Way Connection that connects to the JMS IQ Manager as an external system.

To interface with the eGate 5.0 JMS IQ Manager:

- Add two new e*Way Connections and configure them to publish and subscribe to the 5.0 JMS IQ Manager as shown in Figure 12 and Figure 14. Configure these e*Way Connections to publish messages as text, as shown in [Figure 13 on page 20](#).
- Change the publications and subscriptions of all Collaborations using the 5.0 JMS IQ Manager. Configure them to publish and subscribe to the appropriate inbound and outbound e*Way Connections.

Any components that will continue to use the SRE JMS server (that is, components that will not publish or subscribe to the 5.0 JMS IQ Manager) do not require any configuration changes.

Chapter 3

Upgrading eInsight

This chapter discusses the steps you need to upgrade eInsight.

This chapter contains

- [“Overview” on page 23](#)
- [“Integrate Existing Business Processes and Schemas” on page 24](#)
- [“eInsight Upgrade Procedure” on page 23](#)
- [“Connect Using the eGate Schema Runtime Environment” on page 24](#)

3.1 Overview

When considering an upgrade to eInsight 5.0, you should examine the number and complexity of your existing Business Process Models. If you have several complex Business Process Models in production, you may choose to integrate your current configuration with eInsight 5.0. This option allows you to leave your existing processes in place, while gaining the latest monitoring abilities and allowing you to create your new Business Process Models in eInsight 5.0.

3.1.1. eInsight Upgrade Procedure

The process of installing the eGate Schema Runtime Environment (SRE) includes these high-level steps:

- 1 Upgrade 4.x Components
- 2 Register the Components with the 5.0 Repository
- 3 Connect Schema Components to Projects
- 4 Connect Project Components to Schemas
- 5 Manage all Components with the 5.0 Enterprise Manager

See the *eGate Integrator Upgrade Guide* for more information about upgrading eGate.

3.2 Integrate Existing Business Processes and Schemas

To integrate your existing e*Insight 4.5.x Business Processes and related Schemas, you will use the eGate 5.0 **Schema Runtime Environment (SRE)**.

Integrating your Business Processes and Schemas gives you the flexibility to use your existing implementation with the benefits of the new browser-based monitoring tools available in Enterprise Manager 5.0. Components running in the SRE are monitored via the new 5.0 browser-based Enterprise Manager. The Enterprise Manager displays the status of the 4.5.x components. Additionally, users can start and stop components using the control features of the 5.0 Enterprise Manager.

Your 4.5.x Schemas interact with the SeeBeyond JMS IQ Manager, which makes it possible for your 4.5.x Collaborations to publish and subscribe to version 5.0 components. Similarly, 5.0 components can publish and subscribe to 4.5.x Schemas.

3.2.1. Connect Using the eGate Schema Runtime Environment

The SRE allows e*Gate 4.x systems to take advantage of eGate and eInsight 5.0 tools by providing existing e*Insight Schemas the ability to interact directly with the SeeBeyond JMS IQ Manager. eInsight 5.0 Projects and e*Insight 4.5.x Schemas (running in the SRE) can publish and subscribe to each other's services. This inter-operability can be established without re-writing existing Java and Monk Collaborations.

The Schema Runtime Environment includes the e*Gate and e*Insight 4.5.3 GUIs and editors needed to maintain the upgraded components. See the *eGate Upgrade Guide* for a list of platforms supported by the Schema Runtime Environment.

Upgrading eIndex

This chapter provides an overview of the process for upgrading an eIndex Global Identifier (eIndex) environment from version 4.5.3 to version 5.0.

This chapter includes

[“Upgrade Overview” on page 25](#)

[“System Requirements” on page 25](#)

[“Upgrade Tasks” on page 26](#)

4.1 Upgrade Overview

Upgrading the eIndex environment consists of two distinct tasks: upgrading the eGate environment (Schemas and eWays) and upgrading the database. While eGate provides the Schema Runtime Environment (SRE) that allows you to run your current 4.5.3 Schemas in an eGate 5.0 environment, we recommend that you create a new Project and Collaborations for eIndex 5.0 to accommodate the new data structure and to take advantage of the new Java API. Upgrading the database involves migrating your production data from a copy of the 4.5.3 production database to a new 5.0 database.

4.2 System Requirements

eIndex 5.0 supports different operating system, database, and integration software platforms than eIndex 4.5.3. If you need to upgrade any of the following components, be sure to complete the upgrades before beginning the eIndex upgrade. The following platforms are supported by eIndex 5.0.

- **Operating Systems**

eIndex 5.0 supports the following operating systems.

- ♦ Windows XP, 2000, and 2003
- ♦ AIX 5.1 and 5.2
- ♦ HP-UX 11, 11i, and TRU64 5.1A
- ♦ Sun Solaris 8 and 9
- ♦ Red Hat Linux 8, Advanced Server 2.1

- **Database Platforms**
eIndex 5.0 supports Oracle 8.1.7 or 9i, but does not support Microsoft SQL Server or Sybase at this time.
- **eGate Integrator**
eIndex 5.0 can only be installed with the eGate Integrator version 5.0. The Oracle eWay is no longer required for eIndex.

Important: Your eIndex environment must be at version 4.5.3 in order to upgrade to version 5.0.

4.3 Upgrade Tasks

Moving your eIndex environment to version 5.0 requires upgrading several components. The following steps are required to complete the eIndex upgrade.

- [Upgrading the Schema to a Project](#) on page 26
- [Upgrading the Outbound Queue](#) on page 26
- [Upgrading the GUI](#) on page 26
- [Upgrading the Database](#) on page 28
- [Upgrading the Java API for eIndex Active Integration](#) on page 29

4.3.1. Upgrading the Schema to a Project

eIndex 5.0 provides a Project that processes data in the same manner as the eIndex 4.5.3 sample schema. To upgrade the schema, install eIndex in the Enterprise Designer, and then customize the new Project based on the customizations you made to the 4.5.3 schema. In eIndex 5.0, you will be using Java methods rather than Monk functions to customize how data is processed.

4.3.2. Upgrading the Outbound Queue

In previous versions, when certain updates were made using the eIndex GUI, eIndex published messages to a database table (the “outbound queue”) with the new information. These messages were removed from the outbound queue by the polling eWay, and forwarded to eGate for routing to external systems. eIndex 5.0 publishes all messages processed through eIndex directly to a JMS Topic for routing. To upgrade the outbound queue, you may need to create Collaborations to publish messages to external systems. The outbound queue in the eIndex 4.5.3 database must be empty before beginning the database portion of the upgrade.

4.3.3. Upgrading the GUI

eIndex 4.5.3 had three user interfaces: eIndex Global Identifier, eIndex Administrator, and eIndex Security. eIndex 5.0 retains only the global identifier GUI, which is now a

web-based browser called the *Enterprise Data Manager* (EDM). The functions previously performed using the eIndex Administrator are either obsolete or are now handled through the XML configuration files in the eIndex Project. Security functions are now handled through the configured Environment.

Upgrading to the EDM

Upgrading to the EDM requires that you have a web browser available to connect to the integration server for eIndex. If the standard appearance of the eIndex Global Identifier 4.5.3 GUI was customized, these customizations must be made manually to the Enterprise Data Manager file in the eIndex Project. This includes showing and hiding fields, modifying labels, modifying field names, defining field formats, and so on.

Upgrading Security

Previously, eIndex handled security through its own security module, which restricted access at the user, function, and action levels. eIndex 5.0 relies on the Environment used in the deployment to handle security. Any security information previously stored in eIndex must be transferred manually to the Environment. eIndex no longer supports the Event Notification function; however, this can be handled through eGate and the e-mail eWay.

Upgrading the Administrative Configuration

The eIndex Administrator allowed you to maintain several types of data stored in the eIndex database, including:

- Control key values.
- Configurable queries.
- Common table data.
- INTEGRITY rule set information.

Of these, only common table data is stored in the eIndex 5.0 database, and is the only component that is migrated automatically.

Control Key Values

Most control keys have been removed as obsolete. Weight thresholds must be defined manually in the eIndex Manager Service (the Threshold file).

Configurable Queries

The configurable queries define fields to block for matching, and the combinations of fields allowed for a phonetic search. Previously, the configurable queries were modified through eIndex Administrator, and the information was stored in the database. In version 5.0, the configurable blocking queries are customized in the Query Builder (the Candidate Select file), and the information is stored in that file. eIndex 5.0 does not provide the ability to include constants in the “where” clause of the SQL statements, but it provides greater flexibility in choosing fields on which to block.

Extensive searching was previously defined in the configurable query for record processing, and by a control key for GUI searches. In version 5.0, it is defined by the

blocker query and the ALPHA-SEARCH query in the Query Manager. This information must be transferred manually.

Common Table Data

All common table data is automatically migrated into the eIndex 5.0 database.

INTEGRITY Rule Set Files

Rule set information is no longer stored in the eIndex database, making the Rule Set Maintenance function obsolete. Rule set files only need to be upgraded if they have been customized in version 4.5.3. To upgrade the rule set files, the customized 4.5.3 rule set files must be copied to the machine on which the integration server resides, and the path to the rule set files must be specified by the environment variable VTICFG.

4.3.4. Upgrading the Database

Upgrading the database involves migrating your production data from a copy of the 4.5.3 production database to a new 5.0 database. eIndex 5.0 includes several new tables, and makes several of the 4.5.3 tables obsolete.

Methodology

The migration process involves three databases: the production database, an eIndex 4.5.3 source database, and an eIndex 5.0 target database. To begin the upgrade process, data is exported from the production database and then imported into the 4.5.3 source database to create an exact replica of the production database. After this, the production database is not touched for the remainder of the migration and can continue to be used as the production database. The data is migrated from the 4.5.3 source database to the 5.0 target database. The 5.0 target database becomes the production database once the upgrade and testing are complete.

To ensure no information is lost during the upgrade, inbound messages are stored in the eGate 5.0 queue while the upgrade is performed. Once the export of the production database begins, no changes to person data can be made from the eIndex Global Identifier GUI.

Migration Phases

The migration of data from the 4.5.3 source database to the 5.0 target database is performed in two phases.

- 1 Migrate common table data, systems, and current person data
- 2 Migrate transaction history data

How Person Data is Migrated

When you migrate person information from the 4.5.3 source database to the 5.0 target database, current person data is migrated first. This data is inserted into the system object tables and the single best record (SBR) tables. History information is no longer stored as complete person records in the “*_history” database tables. This information is now stored in one table, sbyn_transaction, which stores a history of only the changes

made in each transaction. This means that migrating transaction history data requires the program to translate each history record to a description of the changes that occurred for that transaction. The data migration process inserts each translation into a row in `sbyn_transaction`, with a complete description of the changes made.

Obsolete Tables

The structure of eIndex 5.0 simplifies the database, and several tables are now obsolete. Most of the information previously stored in these tables is now stored in the XML configuration files, which can be updated as needed. The history tables have been consolidated into a single delta table, and the functions handled by both the security tables and the outbound event tables have been transferred to eGate. Rule set information is now only stored in the rule set files on the integration server, and is no longer stored in the database as well.

Database Customizations

If you have customized your eIndex database by creating any of the following items, they will not be transferred to the new database during the migration process. To maintain the functionality of these items, you must add them to the new eIndex 5.0 database manually.

- New database tables
- New columns added to existing tables
- New stored procedures
- New triggers
- New views

About eGate Queuing

When you export your production database, you must queue any incoming transactions to the 4.5.3 Schema to avoid losing any information. At the same time, you also begin queuing the incoming transactions to the 5.0 Project. During the migration process, you can continue to use the eIndex 4.5.3 production database to process daily transactions, but at the same time you must continue queuing those transactions in the 5.0 Project. When the 5.0 database is ready to move into production, you can start processing the stored Events from the 5.0 queue to bring the database current.

4.3.5. Upgrading the Java API for eIndex Active Integration

eIndex 4.1.1 and 4.5.3 provide Java API methods that can be called by a third party to access information in the eIndex database. This API must be upgraded manually for version 5.0. Customers currently on 4.5.3 who use the functions directly from the eGate Collaborations can upgrade by using the method OTDs rather than writing straight Java in the Collaborations.

Upgrading e*Gate 3.6.2

This chapter describes the options available for e*Gate 3.6.2 customers upgrading to eGate 5.0.

Note: For information on upgrading e*Gate 4.x systems, see [Chapter 2 “Upgrading e*Gate 4.x” on page 9](#).

This chapter contains

- [“eGate 5.0 Upgrade Overview” on page 30](#)
- [“Table Runtime Environment Upgrade” on page 30](#)

5.1 eGate 5.0 Upgrade Overview

e*Gate 3.6.2 customers can upgrade to eGate 5.0 by installing the Table Runtime Environment upgrade.

5.1.1. Table Runtime Environment Upgrade

The Table Runtime Environment upgrades e*Gate 3.6.2 systems to take advantage of eGate 5.0 tools, such as the Enterprise Manager web-based GUI.

The Table Runtime Environment (TRE) makes it possible for existing e*Gate 3.6.2 tables to interact directly with the SeeBeyond Message Server. This makes it possible for DataGate routes to publish and subscribe to eGate 5.0 components. Similarly, eGate 5.0 components can publish and subscribe to DataGate tables running in the TRE. This inter-connectivity is achieved through DataGate routes in the 3.6.2 tables interfacing with the 5.0 Message Server. This inter-operability can be established by simply configuring the routes to point to the eGate 5.0 Message Server’s host name and port number.

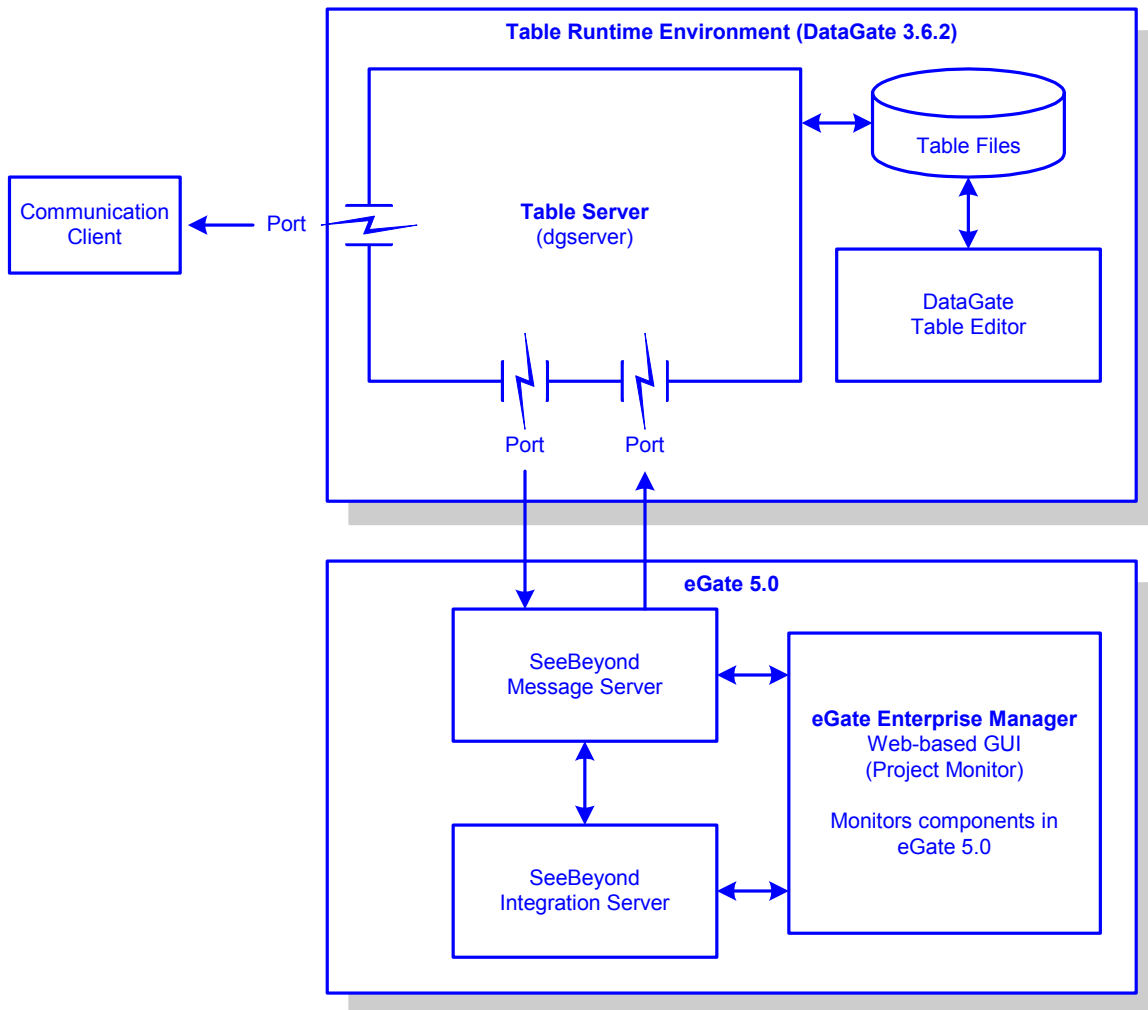
Figure 15 shows how e*Gate 3.6.2 components running in the Table Runtime Environment interact with an eGate 5.0 system.

- Tables on in the TRE interact with each other and with external systems with the same functionality that existed prior to upgrading.
- Components that publish or subscribe to eGate 5.0 components use the standard data route to send and receive messages to and from the SeeBeyond Message

Server. The route to the Message Server is established by pointing publishers and subscribers to the 5.0 Message Server's host name and port numbers.

- The Table Runtime Environment upgrade includes the e*Gate 3.6.2 GUIs and editors needed to maintain the 3.6.2 components.

Figure 15 The Table Runtime Environment



TRE Supported Platforms

The Table Runtime Environment upgrade for eGate 5.0 is supported on the following operating systems:

- Windows Server 2003 and Windows 2000 SP3
- Solaris 8 and 9
- AIX 5.1 and 5.2
- HP-UX 11 and 11i (RISC)
- HP Tru64 V5.1A

The TRE will not be supported on the following operating systems:

- Alpha NT
- AViiON DG/UX

Using New ICAN Suite Products

This chapter describes the new products being introduced with the SeeBeyond ICAN Suite.

This chapter contains

- [“New ICAN Suite Products” on page 33](#)
- [“eBAM” on page 33](#)
- [“eVision” on page 34](#)
- [“ePortal” on page 34](#)

6.1 New ICAN Suite Products

SeeBeyond eBAM Studio™ (eBAM™), SeeBeyond eVision Studio™ (eVision™), and SeeBeyond ePortal Composer™ (ePortal™) are three new products being introduced with the SeeBeyond ICAN suite. These products take full advantage of the eGate Enterprise Designer as well as their own web-based environments.

6.1.1. eBAM

eBAM provides the tools for the creation and delivery of real-time executive dashboards for monitoring Key Performance Indicators (KPIs). KPIs summarize aggregated business data accessed through eInsight or eGate integration layers.

eBAM applications are designed and configured using the Enterprise Designer and the web-based eBAM studio. The eBAM applications are packaged in the Repository and are run within the SeeBeyond Integration Server.

eBAM Supported Platforms

The eBAM Studio is supported on the following operating systems:

- Windows 2000 SP3, Windows XP, and Windows Server 2003
- Solaris 8 and 9
- AIX 4.3.3, 5.1, and 5.2
- HP-UX 11, 11i, and 11i for Itanium

- Compaq Tru64 V5.1A
- Red Hat Linux 8
- Red Hat Linux Advanced Server 2.1

6.1.2. eVision

eVision is a graphical design studio for the WYSIWYG creation of web-based applications, which are integrated with eGate and eInsight runtime assets. eVision provides graphical abstractions of back-end data and modeling of user/system interactions.

eVision lets the user create web pages which can be associated to activities within an eInsight business process. The user can then package the business process as a web application, which can be executed within the SeeBeyond Integration Server.

eVision Supported Platforms

The eVision Studio is supported on the following operating systems:

- Windows 2000 SP3, Windows XP, and Windows Server 2003
- Solaris 8 and 9
- AIX 4.3.3, 5.1, and 5.2
- HP-UX 11, 11i, and 11i for Itanium
- Compaq Tru64 V5.1A
- Red Hat Linux 8
- Red Hat Linux Advanced Server 2.1

6.1.3. ePortal

ePortal is a web portal that can be used to unify business information. ePortal creates a personalizable portal experience with a flexible layout based on user profiles. Users can view multiple eVision web applications simultaneously with other enterprise web content using a single sign-on to web applications.

ePortal Supported Platforms

The ePortal Composer is supported on the following operating systems:

- Windows 2000 SP3, Windows XP, and Windows Server 2003
- Solaris 8 and 9
- AIX 4.3.3, 5.1, and 5.2
- HP-UX 11, 11i, and 11i for Itanium
- Compaq Tru64 V5.1A
- Red Hat Linux 8

- Red Hat Linux Advanced Server 2.1

Changes to Monk

This chapter describes the changes to the behavior of the Monk environment after installing the Schema Runtime Environment.

This chapter contains

- [“Changes to Monk’s Behavior” on page 36](#)

1.1 Changes to Monk’s Behavior

The following table lists the changes that have been made to the Monk engines or specific Monk functions since e*Gate 4.1.1. For additional details of the issues listed below, see the ESR readme.txt referenced for that specific issue.

Table 2 Monk Updates

Version	Description	ESR
4.1.1	Repeated calls to the open-pipe Monk function cause processes to be spawned without shutting down properly. This ESR fixed the issue without changing the behavior of the Monk function.	44338
	This ESR fixes a problem where SWIFT messages produce the default data of optional nodes even when no data is entered into that field.	29844
	Changes were made to the following Monk functions to incorporate BCD (batch data communication) changes: <ul style="list-style-type: none"> ▪ sapbapi-struct-fetch.monk ▪ sapbapi-struct-raise.monk ▪ sapbapi-struct-send.monk ▪ sapbapi-struct-call.monk ▪ saptrfc-struct-call.monk ▪ saptrfc-send-idoc4.monk ▪ saptrfc-receive-idoc4.monk The copy-strip command caused parsing errors and truncated any data fields ending in characters considered to be spaces by copy-strip . All copy-strip commands were also removed from these Monk functions.	28037
	The file stc_monksap.dll was modified so that it would not interpret BLOB data as C-string data, which would otherwise result in the premature ending of all BLOBs by a NULL character (such as from a BCD field). The net error would be that fields defined after a BCD field would be disregarded, causing the BAPI to malfunction.	28037

Table 2 Monk Updates (Continued)

Version	Description	ESR
4.1.1 (Continued)	Added ETD templates to support updated EDIFACT libraries (d95a to d00a).	26257
4.1.2	Updated the EDIFACT ETD templates to remove the periods in some of the node names. Monk interprets the periods to be separators for subnodes and parses the nodes incorrectly.	27704
	After applying ESR 50507, the path-valid? function no longer works. This ESR corrects that problem.	52154
	After applying ESR 40201, the open-random-access-file function no longer works. This ESR corrects that problem.	48403
	After applying ESR 41845, any e*Ways based on stcewipmp.exe crash when their Collaborations execute the \$event-clear function. This ESR corrects that problem.	47918
	This ESR fixes a problem where the path-nodedepth function returns the incorrect depth when passing it an iteration of a repeating node.	34585
	This ESR provides an enhancement. After applying this ESR, a Monk exception will be raised when no data is mapped for a required node which has an optional parent node.	33931
	This ESR adds additional Monk functions for converting data between ASCII and EBCDIC systems. For a complete list of the conversion functions, see the Monk Utility Functions chapter in the Monk Developer's Reference. Additional conversion functions (although not part of this ESR) are listed in the International Conversion Functions chapter.	31801 and 32344
4.5	This ESR fixes a problem where the addition operator (+) incorrectly returns non-integer sums when two integers are added.	35862
4.5.1	A memory leak occurred after applying ESR 43731. This ESR fixed that problem.	46257
	This ESR resolves a problem with the copy-strip function. The copy-strip function did not return the correct value when the length of the byte in multi-byte data.	43060
	This ESR resolves a problem where the set! Monk function does not resolve the index of repeating nodes when it is run against a path (for example, set! current_var ~in%root.child[<i>].data).	42500
4.5.2	None	
4.5.3	The file-exists and open-input-file functions were enhanced to accommodate files larger than 2 GB.	
	This ESR fixes a problem with positional based escape delimiters.	54189
	This ESR fixes a problem where a Monk exception was being generated when a local variable defined in a let expression is passed as an argument to another function because the variable is unresolved.	53526

Glossary

Collaboration

(See Service and Collaboration Definition.)

Collaboration Definition

The encoding of business rules, in Java or XSLT format. Typically, the encoding consists of operations on OTDs (see **“OTD” on page 39**). Several Collaborations can have the same Collaboration Definition.

Connection

Consists of the configuration information that enables an eWay to connect to an external system.

Connectivity Map

Contains business logic and routing information about the data transmission. A Connectivity Map usually includes one or more Collaborations, Passthrough Collaborations, topics, queues, and eWays. A Connectivity Map is created under a Project. A Project may have multiple Connectivity Maps.

Constants

A name or value pair that is visible across a Project.

Deployment Profile

Contains the information about how the Project components will be deployed in an Environment. A Project can have multiple Deployment Profiles, but only one Deployment Profile can be activated for a Project in any one Environment.

Derived Collaboration

Collaboration that inherits operations from another, according to standard object-oriented practice.

eGate System

See **“Project”**.

Environment

A collection of physical resources and their configurations that are used to host Project components. An Environment contains logical hosts and external systems.

eWay

A link between a Collaboration and an external connection including the message server connection (topic or queue) or external application.

External Application

A logical representation of an external application.

External System

A representation of an external application system.

ICAN Suite

The SeeBeyond Integrated Composite Application Network Suite, which is based on eGate Integrator.

Integration Server

Software platform that houses the business logic container used to run Collaborations. Provides transaction services, persistence, and external connectivity.

Link

The JMS Connection between a Collaboration and a topic or queue in a JMS-compliant message server.

Linked Message Destination

A reference to a Message Destination defined in another Connectivity Map.

Logical Host

An instance of the eGate runtime Environment that is installed on a machine. A Logical Host contains the software and other installed components that are required at runtime, such as application and message servers.

Management Agent

Uses J2EE technology to manage and monitor an eGate 5.0 deployment that may contain other application servers in addition to the SeeBeyond Integration Server. Defines management interfaces and services designed for distributed environments, focusing on providing functionality for managing networks, systems, and applications.

Message Destination

A general term for a topic or queue. Two or more Projects can share a message destination that has the same name and is deployed on the same message server. A single Project may also have a single message destination referenced in multiple Connectivity Maps.

Message Server

JMS-compliant, guaranteed delivery store, forwarding, and queueing service.

OTD

An acronym for Object Type Definition. OTDs contain the data structure and rules that define an object. An OTD is used in Java Collaboration Definitions for creating data transformations and interfacing with external systems.

Project

Contains a collection of logical components, configurations, and files that are used to solve business problems. A Project organizes the files and packages and maintains the settings that comprise an eGate system in SeeBeyond's Enterprise Designer.

Queue

A JMS queue is a shareable object that conforms to the *point-to-point* (p2p, or PTP) messaging domain, where one sender delivers a message to exactly one receiver. When the SeeBeyond Message Server sends a message to a queue, it ensures it is received once and only once, even though there may be many receivers “listening” to the queue. This is equivalent to the subscriber pooling in other queue implementations. You can reference a queue that exists in another Connectivity Map or Project.

Repository

Stores and manages the setup, component, and configuration information for eGate Projects. The Repository also provides monitoring services for Projects, which include version control and impact analysis.

Schema Runtime Environment

An add-on in eGate 5.0 that provides the upgrade path for e*Gate 4.x users to upgrade to eGate 5.0. Also known as the SRE.

Security Server

A standalone server that is the connection point to underlying eGate security environments.

Service

Contains the information about executing a set of business rules. These business rules can be defined in a Java Collaboration Definition, XSLT Collaboration Definition, Business Process, eTL Definition, or other service. A Service also contains binding information for connecting to JMS Topics, Queues, eWays, and other services.

Subproject

An independent Project that is included as part of another Project and listed on the Enterprise Explorer tree beneath the main Project icon.

Topic

A JMS topic is a shareable object that conforms to the *publish-and-subscribe* (pub/sub) messaging domain, where one publisher broadcasts messages to potentially many subscribers. When the SeeBeyond Message Server publishes a message on a topic, it ensures that all subscribers receive the message.

XSLT

An acronym for Extensible Stylesheet Language Transformations. A file format used in eGate to generate Collaboration Definitions.

e*Gate 4.x Terms in eGate 5.0

Table 3 provides definitions for the terms that are new with eGate release 5.0, as well as equivalent terms from eGate release 4.x.

Table 3 eGate 5.0 Terms

5.0 Term	4.x Equivalent Term
Collaboration	Collaboration
Collaboration Definition	Collaboration Definition
Connection	e*Way Connection
Connectivity Map	Closest: Network View of an entire Schema
Deploy	Run the Control Broker
Deployment	<none>
Deployment Profile	Closest: Schema
Enterprise Designer	Enterprise Manager
Enterprise Manager	Enterprise Monitor
Environment	Schema (except only includes physical information, not business logic)
eWay	e*Way Connection e*Way
eWay Configuration	e*Way Connection Configuration
External Application	e*Way Connection
External System	e*Way Connection
JMS Connection	e*Way Connection
Integration Server	<none>
Link	JMS e*Way Connection
Linked Message Destination	<none>
Logical Host	Participating Host
Message Destination	Topic or queue
Message Server	JMS IQ Manager
Object Type Definition (OTD)	Event Type Definition (ETD)
Process Manager	Control Broker
Project	Schema (except not including physical layer)
Queue	JMS queue
Repository	Registry
Subproject	Schema

Table 3 eGate 5.0 Terms (Continued)

5.0 Term	4.x Equivalent Term
Topic	JMS topic
XSLT	<none>

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