

Installation Guide

BuyerXpert 4.1

Version 4.1, Service Pack 3

October 2001

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About This Document

The *BuyerXpert 4.1 Installation Guide* provides information on how to install BuyerXpert and all of the enabling software.

This preface contains the following sections:

- Audience
- What's in This Document
- Documentation Conventions
- The Document Online
- How to Use the Online Help
- Related Documentation
- Product Support

Audience

The audience for this document is the BuyerXpert installer.

A BuyerXpert installer should have experience in working with and installing the following:

- Web servers, directory servers, and application servers
- Unix operating system
- Oracle and LDAP databases
- TCP/IP communications
- Open Buying on the Internet (OBI)

- Internet browsers

What's in This Document

The following table summarizes what each chapter covers.

Table 1 Chapter Summary

If you want to know about this	See this chapter
Description of contents of this guide; listing of documentation set; information on product support	"About This Document"
Requirements and worksheets to prepare for the installation of BuyerXpert	Chapter 1, "Planning to Install BuyerXpert"
Instructions for installing Oracle Database	Chapter 2, "Installing Oracle Database"
Instructions for installing iPlanet Web Server (iWS), iPlanet Application Server (iAS) and the Directory Server (LDAP) software	Chapter 3, "Installing iPlanet Servers Software"
Instructions for installing BuyerXpert	Chapter 4, "Installing BuyerXpert"
Instructions for installing Process Manager ECXpert and Catalog Manager	Chapter 5, "Installing Additional Software"
Starting up, shutting down and uninstalling BuyerXpert procedures	Chapter 6, "Shutting Down, Starting and Uninstalling BuyerXpert"
Troubleshooting tips	Appendix A, "Troubleshooting"

Documentation Conventions

This document uses the following conventions:

- The `monospace` font is used for sample code and code listings, Application Program Interface (API) and language elements (such as method names and property names), file names, path names, directory names, Hypertext Markup Language (HTML) tags, and any text that must be typed on the screen.
- The *italic* font is used in code to represent placeholder parameters (variables) that should be replaced with an actual value.
- Brackets ([]) are used to enclose optional parameters.
- A slash (/) is used to separate directories in a path. (Windows NT supports both the slash and the backslash.)

The Document Online

You can find the *BuyerXpert Concepts* online in Portable Document Format (PDF) and HTML formats at the following web site:

<http://docs.iplanet.com/docs/manuals/>

How to Use the Online Help

When using BuyerXpert, you can click Help in any window to open a page that explains the fields and components of that window. You can then navigate to other parts of Help using the Help table of contents and index.

NOTE To view the full Help table of contents listing, you may need to make your browser window larger.

Because Help is viewed in a browser window, you can use the navigational tools of the browser as well as the navigational tools within Help. For example, you can use browser commands to print, find information, and copy and paste.

Related Documentation

The BuyerXpert documentation set includes:

- *Concepts*—Describes the over-all functionality of BuyerXpert. Read this document if you are unfamiliar with BuyerXpert.

- *Release Notes*—Contains important information on the current release of BuyerXpert. Read this document before working with the new BuyerXpert release.
- *Upgrade Guide*—Provides guidelines and instructions for upgrading an existing BuyerXpert system, including migrating existing data and configurations.
- *Administrator's Guide*—Provides reference information and instructions on administering a fully-installed BuyerXpert system.
- Admin interface Help—Provides guidelines and instructions for using the graphical administrative interface to administer BuyerXpert.
- User interface Help—Provides guidelines and instructions for performing the procurement tasks of BuyerXpert.
- Catalog interface Help—Provides guidelines and instructions for managing catalogs.

The following documentation contains additional information relevant to using this BuyerXpert document:

- Actuate documentation
- iPlanet Web Server (iWS) documentation
- iPlanet Application Server (iAS) documentation
- *ECXpert Administration Guide*
- *ECXpert Operations Reference Manual*

Documentation for all iPlanet products can be found at the following web site:

<http://docs.iplanet.com/docs/manuals/>

Product Support

If you have problems with your BuyerXpert system, contact iPlanet customer support using one of the following mechanisms:

- iPlanet online support web site at:

<http://www.iplanet.com/support/online/>

From this location, the CaseTracker and CaseView tools are available for logging problems.

- The telephone dispatch number associated with your maintenance contract

So that the technical support staff can best assist you in resolving problems, please have the following information available when you contact support:

- Description of the problem, including the situation where the problem occurs and its impact on your operation
- Machine type, operating system version, and product version, including any patches and other software that might be affecting the problem
- Detailed steps on the methods you have used to reproduce the problem
- Any error logs or core dumps

Planning to Install BuyerXpert

This chapter describes planning and tasks you must perform before you can install BuyerXpert Version 4.1.

The following sections are contained in this chapter:

- Assumptions About the Site Installer
- Installation Checklist
- Requirements
- Completing the Installation Worksheet
- Installation Roadmap

Assumptions About the Site Installer

This guide is written with the following assumptions:

- You are an experienced site administrator for the iPlanet Web Server (iWS) and the iPlanet Application Server (iAS).
- You have a working knowledge of the Oracle database being used with BuyerXpert.
- You are an experienced database administrator.
- You have access to the root user ID (a necessity) and some Unix administration experience as the root user.

Installation Checklist

The following checklist displays the tasks you should plan in advance to ensure a successful installation. You can refer back to this checklist as you complete each stage of the installation.

Be sure to perform each task in the order presented on the checklist in Table 1-1.

Table 1-1 Installation Checklist

Make sure your system meets the following requirements:	
	See the section "Hardware Requirements."
	See the section "System Requirements."
	See the section "Software Requirements."
Verify the following:	
	Have root access
	Have distribution media
Install the software in the following sequence:	
	Oracle Database Server Enterprise Edition
	iPlanet Web Server (iWS)
	Actuate software
	iPlanet Application Server (iAS)
	iPlanet BuyerXpert software
Install the additional software:	
	iPlanet ECXpert software
	iPlanet Portal
	Reuters™ Multi-Currency Live Feed

Requirements

When you plan the configuration, you need to take into account the following:

- Hardware Requirements
- System Requirements
- Software Requirements

Hardware Requirements

The following are the minimum hardware requirements to install and set up a BuyerXpert server:

- A SunSPARC Ultra 2 workstation or better with:
 - 1 CPU (minimum), 2 CPUs (recommended)
 - 1 GB RAM (minimum), 2 GB RAM (recommended)
 - 9 GB hard disk
 - CDROM drive

System Requirements

Table 1-2 lists the system requirements for the Sun workstation that you have designated as the BuyerXpert server. Log in as root to run the commands provided in the table.

Table 1-2 System Requirements

To check that this resource...	Has this minimum requirement...	Use this command
Operating System	Sun Solaris version 2.6 or 2.8	<code>showrev</code>
	Solaris patches (for Solaris version 2.6)	<code>showrev -p grep Patch</code> Make sure to apply any Y2K patches for the Solaris operating system.
Memory	512 MB RAM (minimum)	<code>prtconf grep memory</code>
	2 GB RAM (recommended)	
Swap Space	2x memory (minimum)	<code>swap -s</code>
	3x memory (recommended)	
Disk Space	9 GB for installation	<code>df -k /directoryName</code>

NOTE For a list of Solaris patches, see the *BuyerXpert Release Notes*.

Software Requirements

Table 1-3 lists the software requirements for installing and using BuyerXpert.

Table 1-3 Software Requirements

Software	Included (Embedded or Bundled) with the BuyerXpert CD
Actuate e.Report Server, Version 4.1	Yes (bundled)
iPlanet Web Server (iWS) Version 4.1 SP7	Yes (bundled)
iPlanet Application Server (iAS), Version 6.0 SP2	Yes (bundled)
iPlanet Directory Server (LDAP) Version 4.12	Yes (bundled with iAS 6.0 SP2)
ECXpert 3.5	No
Netscape Communicator Version 4.7 or higher (or Microsoft Internet Explorer Version 5.0 or higher)	No
Oracle Client 8.1.6 (if BuyerXpert is not installed on the same machine)	No
Oracle Server Database Standard or Enterprise Edition with InterMedia text 8.1.6	No

NOTE The SellerXpert package can optionally use TAXWARE. However, you must contact TAXWARE directly to receive service and support for this program.

Completing the Installation Worksheet

Record your specific settings in the installation worksheet before you install BuyerXpert. While in some cases you can use default configuration values provided by the BuyerXpert installer utility, there are some unique settings you must provide. The installer utility will prompt you for this information during installation.

Examples provided in this worksheet also appear in the installation instructions in the following chapters.

After you complete the BuyerXpert installation, keep this worksheet in a safe place. You will find it useful in the future when you administer the system.

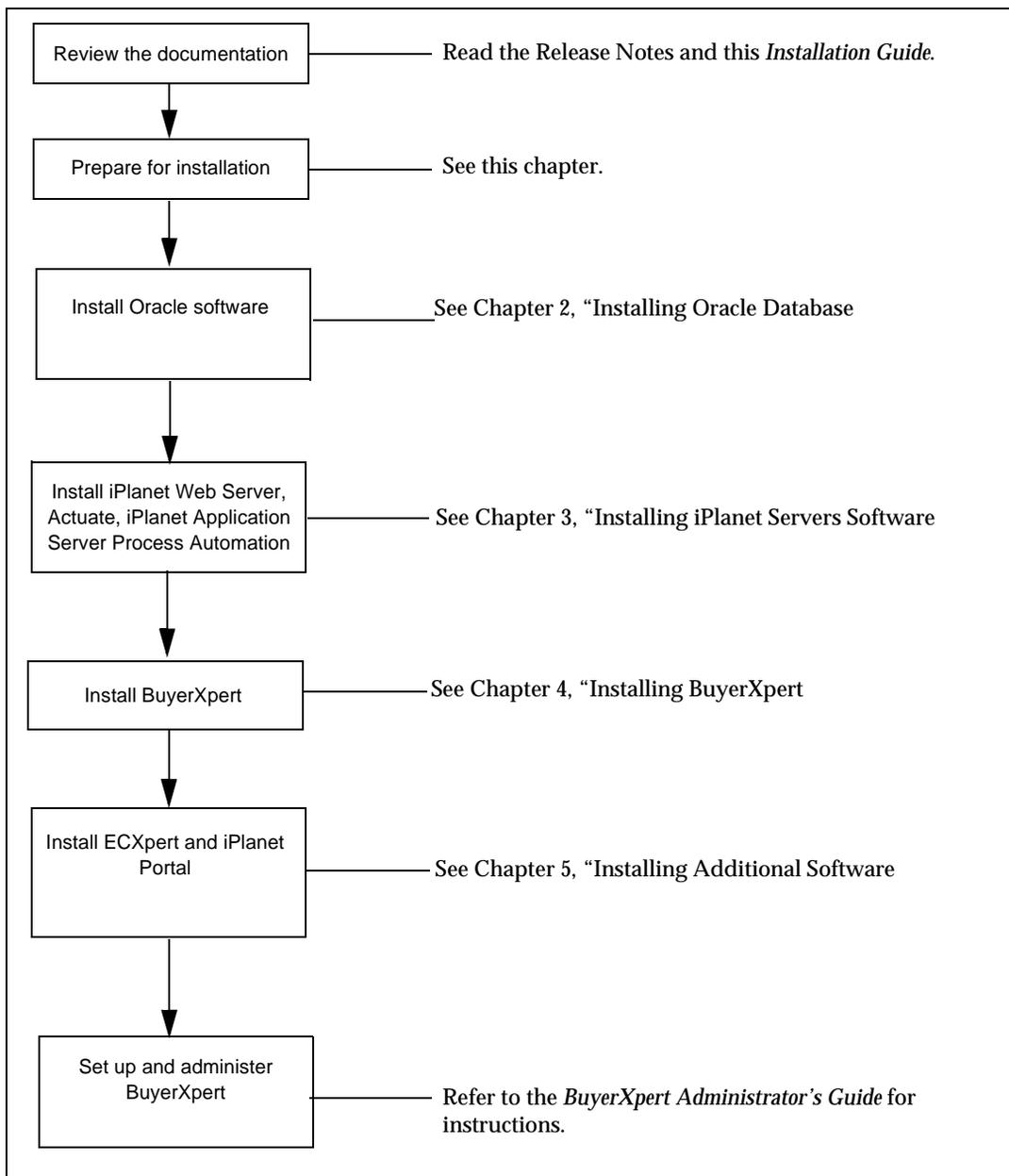
NOTE Make sure that you install BuyerXpert and iAS as the same user. Do not install BuyerXpert and iAS as `root`.

Table 1-4 Installation Worksheet

Configuration Value	Example Given	Your Setting
Oracle user name	oracle8	
Oracle SID/path	BXpert	
Oracle group	dba	
Oracle database name	BXpert	
Global database name	BX	
System user name	buyer	
System group	staff	
iWS server user name	admin	
Hostname	colonial	
iWS admin server port	8888	
iWS port	8080	
iAS administrator user name	admin	
iAS directory server network port	10000	
iAS admin port	10001	
Netscape configuration directory server administrator ID	admin	
Process Manager administrator user ID	admin	
LDAP instance port	20000	

Installation Roadmap

This roadmap lists the tasks you must complete in order to successfully install and configure BuyerXpert. For your convenience, the roadmap points to the chapter or to another manual that includes the information you need to complete each task.



Installing Oracle Database

This chapter provides information about installing the Oracle 8.1.6 Database Server Standard or Enterprise Edition for Solaris 8 operating systems. You must install this software before installing BuyerXpert.

Detailed information regarding Oracle products can be found in the Oracle documentation set.

NOTE The following instructions are only guidelines for installing Oracle software. Your individual Oracle configuration may be different.

Hardware Requirements

Before installing Oracle, make sure that your hardware is sufficient. You should have the following on your system:

- At least 128 MB of RAM
- CD ROM drive
- Swap space of at least 400MB or twice the RAM size
- At least 1300 MB of disk space

This will allow you to perform a typical installation to create a simple database for prototyping. A real implementation will require more RAM and more disk space.

The following assumptions are made for this example of an Oracle installation:

Table 2-1

ORACLE_HOME	/export/oracle8
Oracle group	dba
Oracle user	oracle

Installing Oracle

NOTE The following steps are for installing Oracle 8.1.6 Database Server Enterprise Edition only.

1. Start the installation process as root:

```
%su -
```

2. Create a directory for Oracle installation:

```
%mkdir -p /export/oracle8
```

3. Create a Unix group that will be used by Oracle:

```
%groupadd dba
```

4. Create a Unix user that will be the Oracle owner:

```
%useradd -g dba -d /export/oracle8 -s /bin/csh oracle
```

5. Change the ownership of the Oracle directory:

```
%chown oracle:dba /export/oracle8
```

6. Create a password for oracle user:

```
%passwd oracle
```

7. In any text editor, open the /etc/system file and append the following lines:

```
set shmsys:shminfo_shmmax=4294967295
```

```
set shmsys:shminfo_shmmin=1
```

```
set shmsys:shminfo_shmmni=600
```

```
set shmsys:shminfo_shmseg=100
```

```
set semsys:seminfo_semmmap=100
```

```

set semsys:seminfo_semmns=4096
set semsys:seminfo_semmnu=4096
set semsys:seminfo_semume=100
set semsys:seminfo_semmsl=100
set semsys:seminfo_semopm=100
set semsys:seminfo_semvmx=32767

```

```
* -----
```

```
* Message Queue
```

```
* -----
```

```

set msgsys:msginfo_msgmap=1024
set msgsys:msginfo_msgmax=8192
set msgsys:msginfo_msgmnb=65535
set msgsys:msginfo_msgmni=1024
set msgsys:msginfo_msgssz=2048
set msgsys:msginfo_msgtql=1024
set msgsys:msginfo_msgseg=4096

```

8. Add the following lines to your .cshrc file:

```

setenv ORACLE_BASE /export/oracle8
setenv ORACLE_HOME /export/oracle8
setenv ORACLE_SID BXPert
setenv PATH $ORACLE_HOME/bin:$PATH
setenv LD_LIBRARY_PATH/export/Oracle8/lib:$LD_LIBRARY_PATH
setenv TNS_ADMIN /export/oracle8/network/admin
setenv NLS_LANG AMERICAN_AMERICA.US7ASCII

```

NOTE If you want to use character set UTF8, then change:

```
NLS_LANG to AMERICAN_AMERICA.UTF8
```

9. Enter the following commands to boot the system:

```
%sync
```

```
%sync
```

```
%sync
```

```
%reboot
```

10. After the system is booted, change the user to oracle:

```
%su oracle
```

```
%password: oracle
```

11. Make sure that you have sourced the `.cshrc` file.

12. Set the `DISPLAY` variable:

```
%setenv DISPLAY <hostname>:0.0
```

13. From another terminal window (that does not have Oracle as the user), type:

```
%xhost +
```

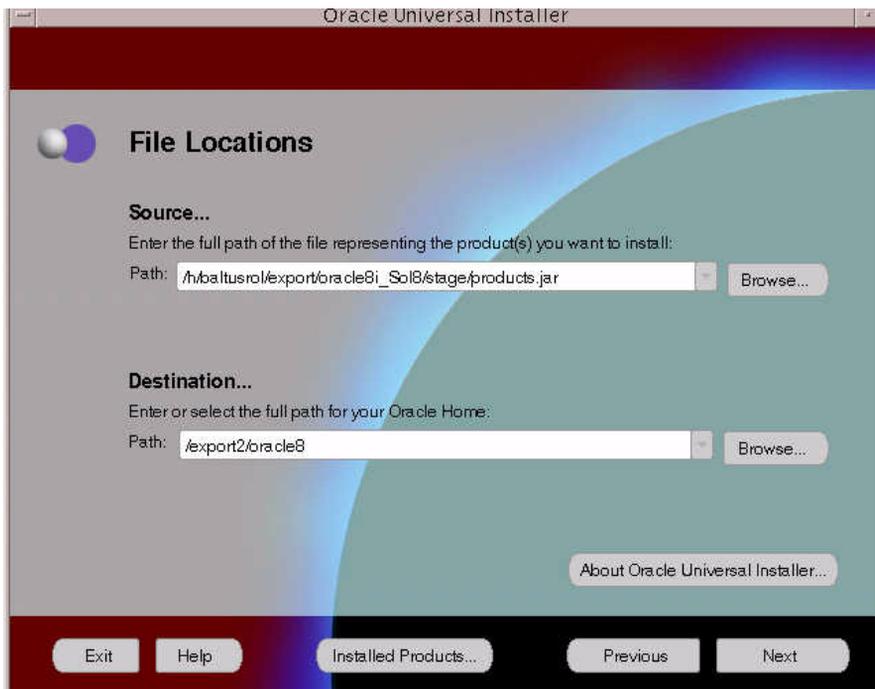
This will allow the database installation to display on your screen.

14. From the Oracle CD, type:

```
./runInstaller
```

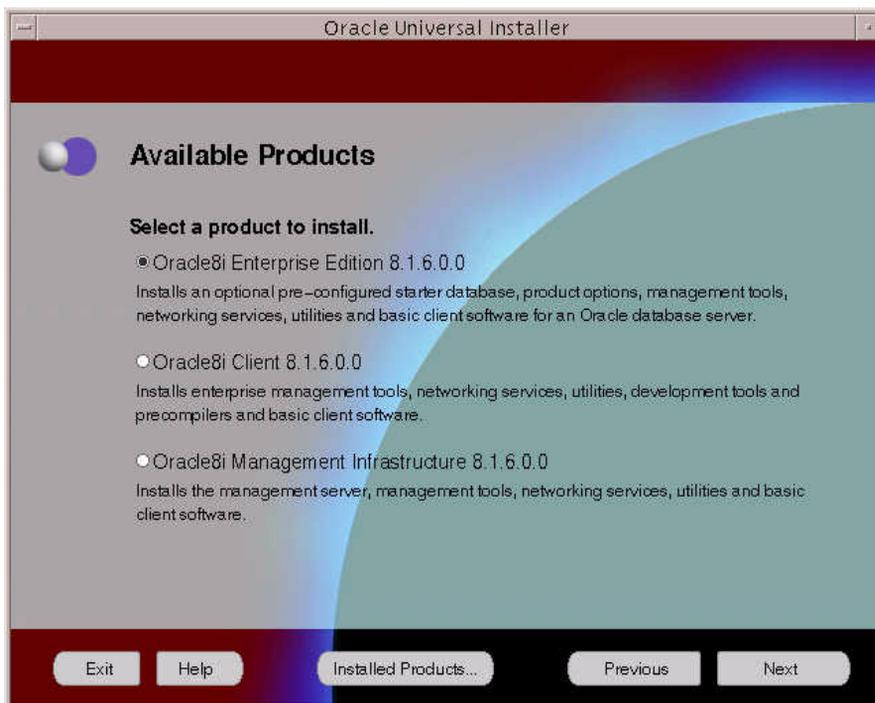
15. When the welcome screen displays, click Next.

16. The File Locations screen displays. Leave the Source field unchanged. The Destination field will show the ORACLE_HOME value that you have set in your environment. Click Next.

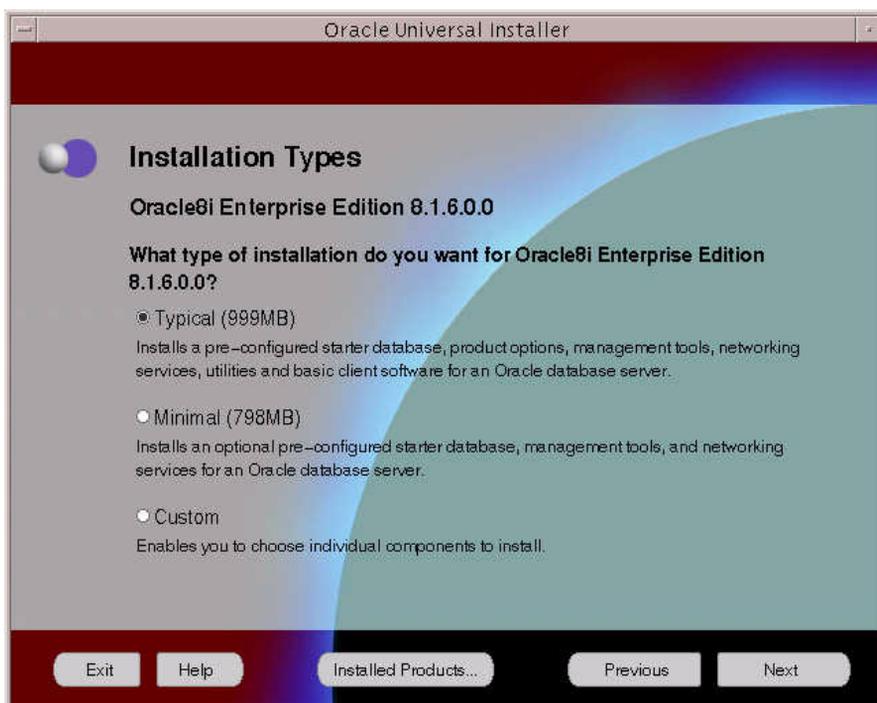


17. The Unix Group Name screen displays. Enter the name of the Unix group you created earlier for Oracle (dba). Click Next.

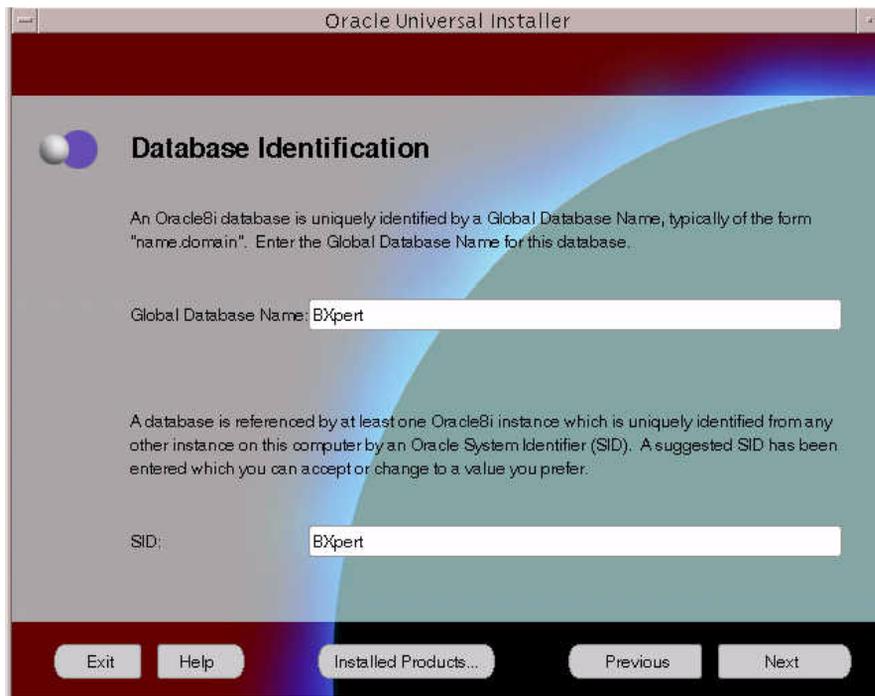
18. The Available Products screen displays. Choose Oracle8i Enterprise Edition 8.1.6.0.0 and click Next.



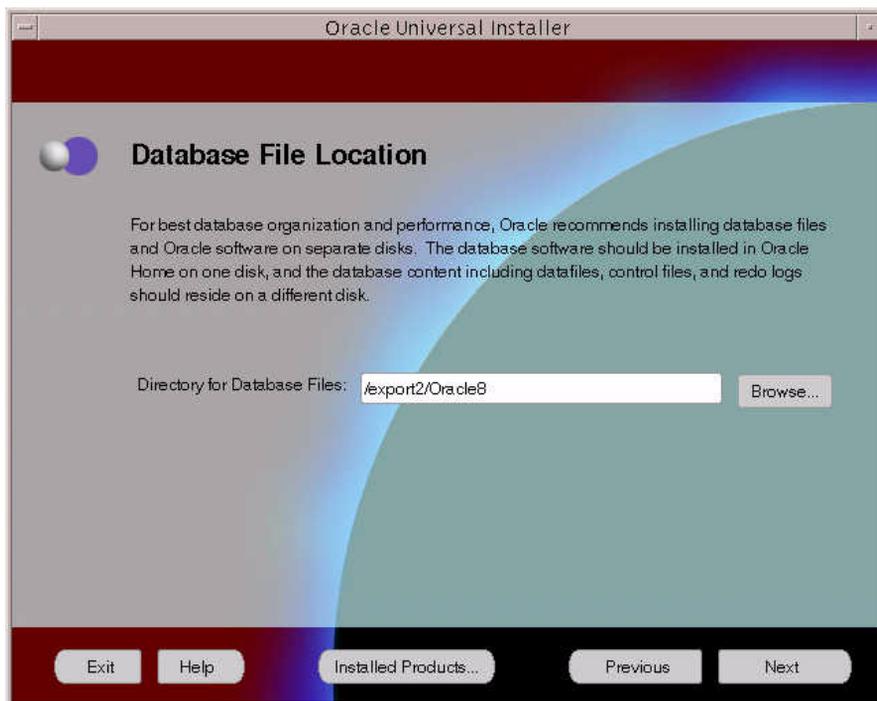
19. The Installation Types screen displays. Select the Typical install to get a basic set of Oracle software installed and click Next.



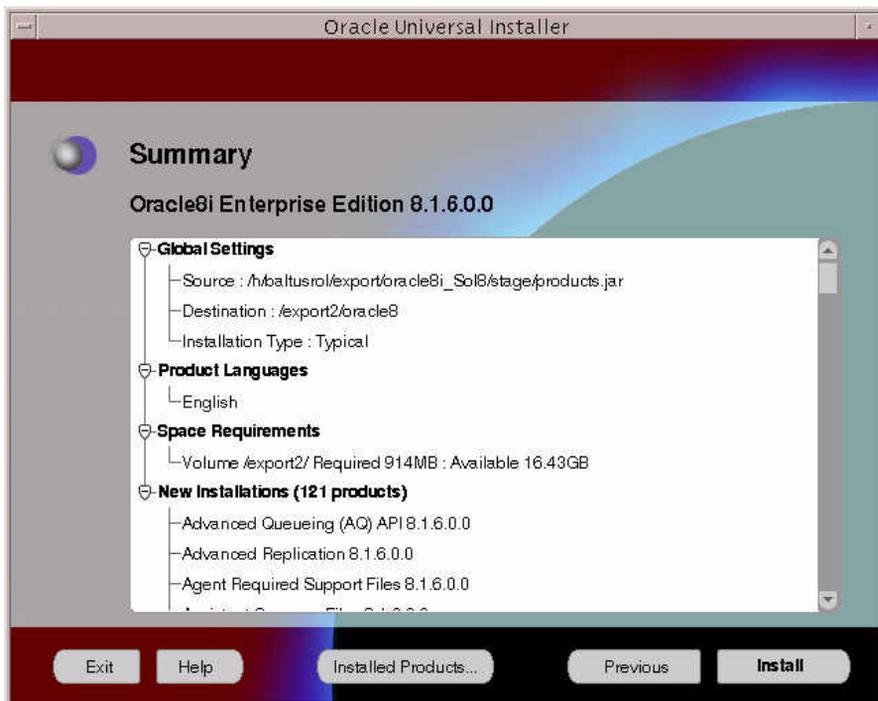
20. The Database Identification screen displays. Enter the ORACLE_SID you are creating for both the Global Database Name and SID and click Next.



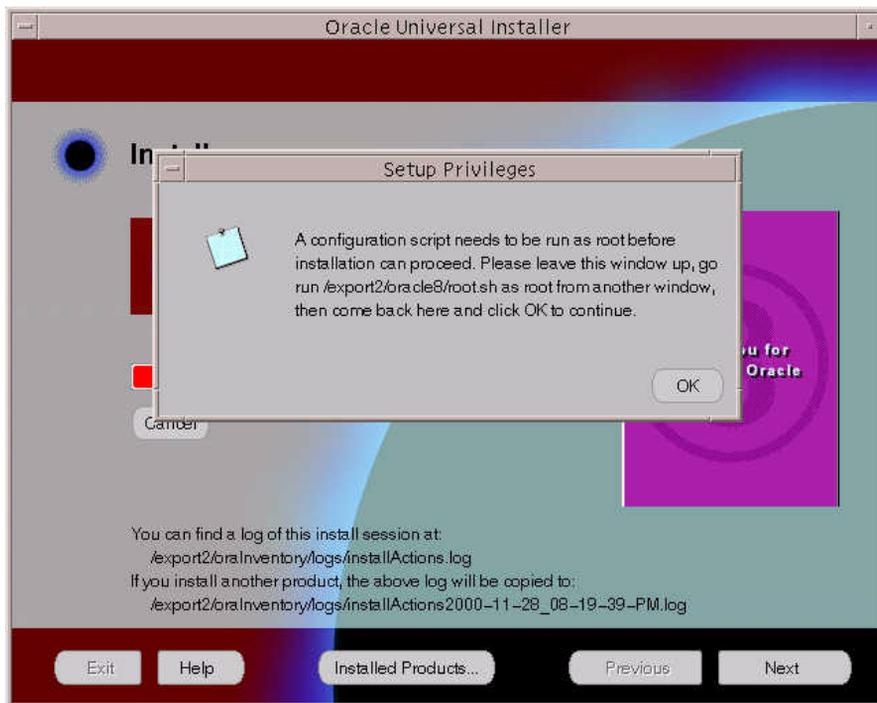
21. The Database File Location screen displays. Enter the directory you have created earlier to install Oracle and click Next.



22. The Summary screen displays. Review all the selections you have made to confirm that they are correct and click Install.



23. During installation, a Setup Privileges window displays. The installation will pause at this point, waiting for you to run a script as root. Follow the instructions and run the root.sh script as a root user.



24. After executing the script, click OK, and then click Next.
25. When Oracle installation has completed, a screen displays the database information. Verify that information and click OK.
26. This is the end of Oracle Installation. Click Exit.
27. During the installation, a default database instance is created. The instance is created in the name that you have provided in the Database Identification screen. You do not want to use this instance since it is not configured to BuyerXpert's specification. You need to remove this instance by executing dbassist from <ORACLE_HOME>/bin directory and select delete a database.
28. Click Next. Then, select the database instance (there should only be one instance since you just created the database server).
29. Click Finish. The database instance should now be deleted.

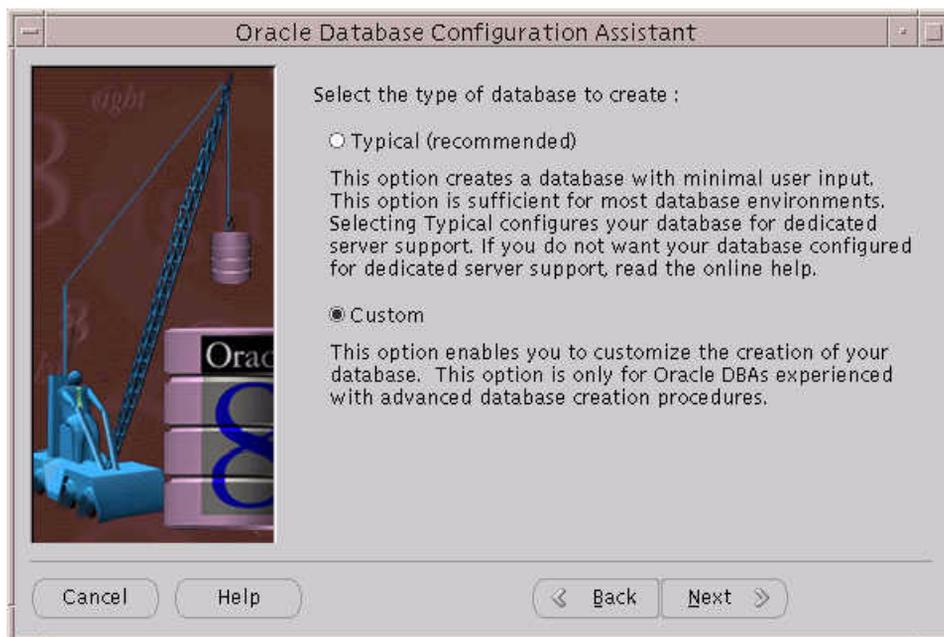
Create an Oracle Instance

The following procedures are to create an Oracle instance that is configured to BuyerXpert 4.1.

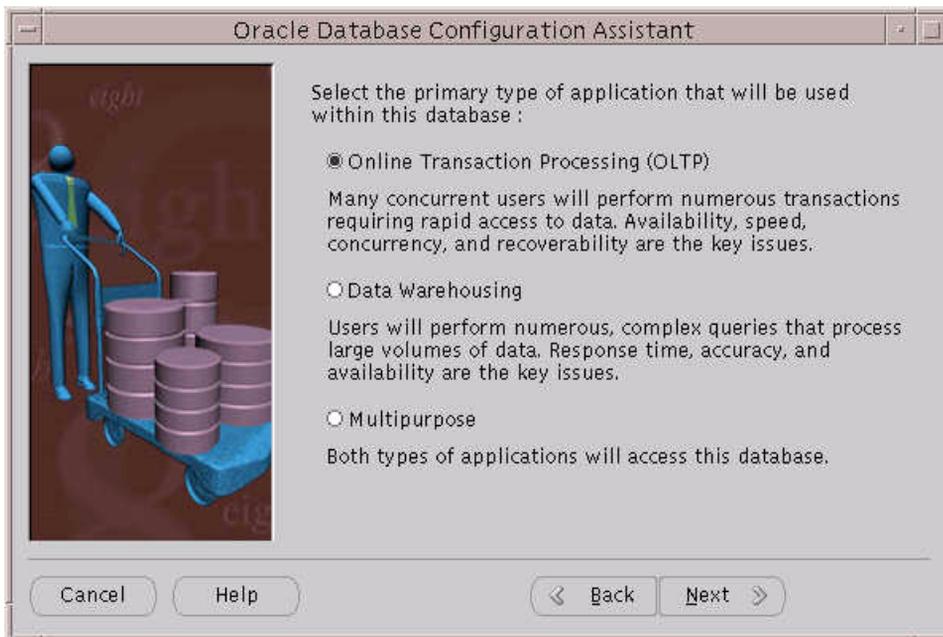
1. You now need to create an Oracle instance that is configured to BuyerXpert's specification. Execute dbassist from <ORACLE_HOME>/bin directory and select create a database. Click Next.



2. To configure to BuyerXpert's specification, you need to customize the creation of the database instance. Select the custom option and click Next.



3. Select Online Transaction Processing (OLTP) and click Next.

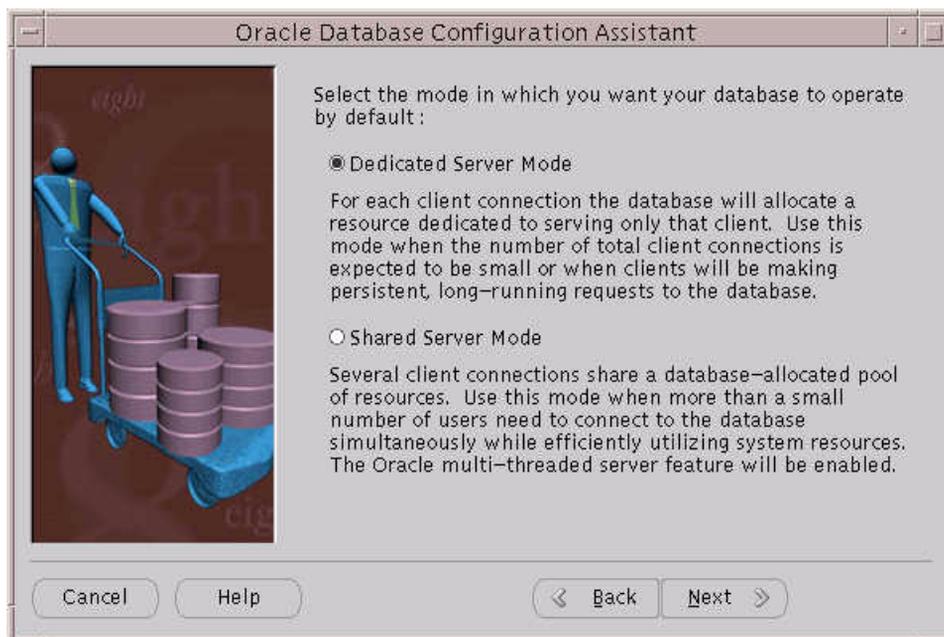


4. When the next screen displays, enter the approximate number of users to be concurrently (simultaneously) connected to the database at any given time. Oracle Database Configuration Assistant uses this value and the information you provided about your database environment on the previous screen to set rollback information and various initialization file parameters.

NOTE MTS is configured for you if you selected OLTP as your database environment and entered a value of 20 or more for the number of users to be concurrently connected to the database in the Create Typical Database screen.

For BuyerXpert, you need at least 20 users. Click Next.

5. Select Dedicated Server Mode, since only a small amount of BuyerXpert will be using this instance. Click Next.



6. Click the following check boxes and click Next:

Oracle Time Series

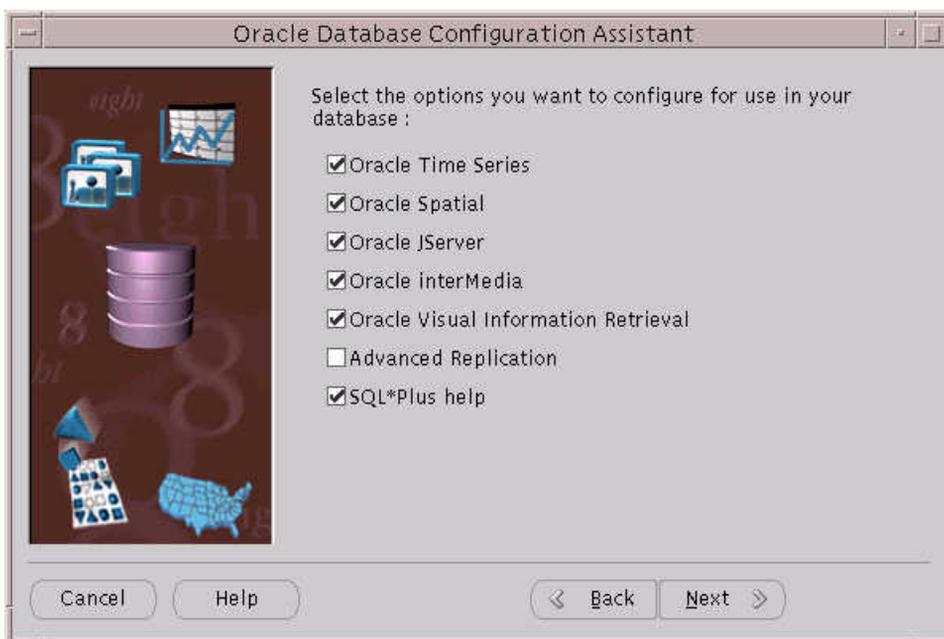
Oracle Spatial

Oracle JServer

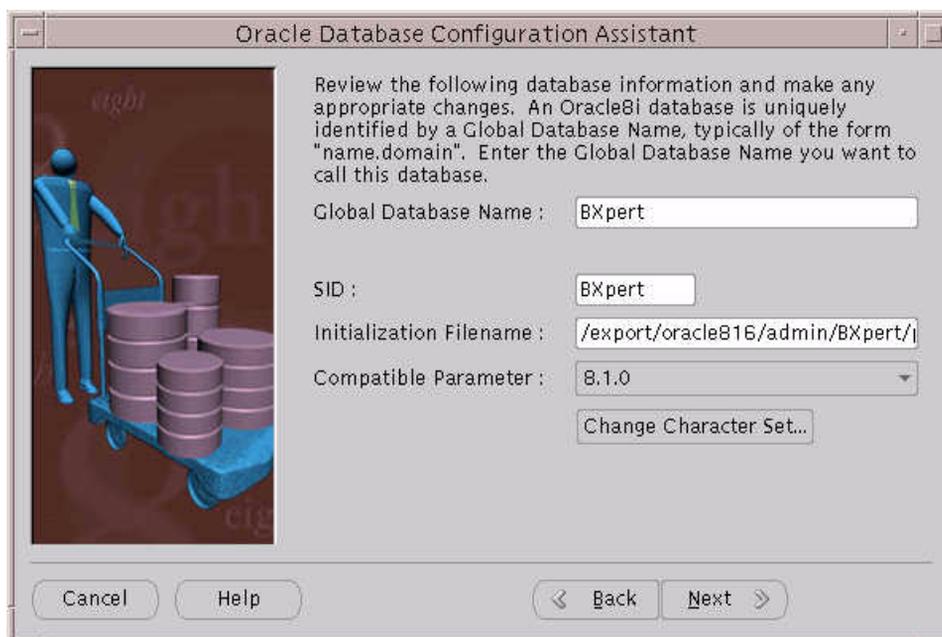
Oracle InterMedia

Oracle Visual Information Retrieval

SQL*Plus help



7. Enter the database name and SID. If your NLS_LANG is set to UTF-8, then the character set is UTF-8. If you like to change it, click Change Character Set... and make sure that the environment NLS_LANG is set to the character set that you selected. Click Next.



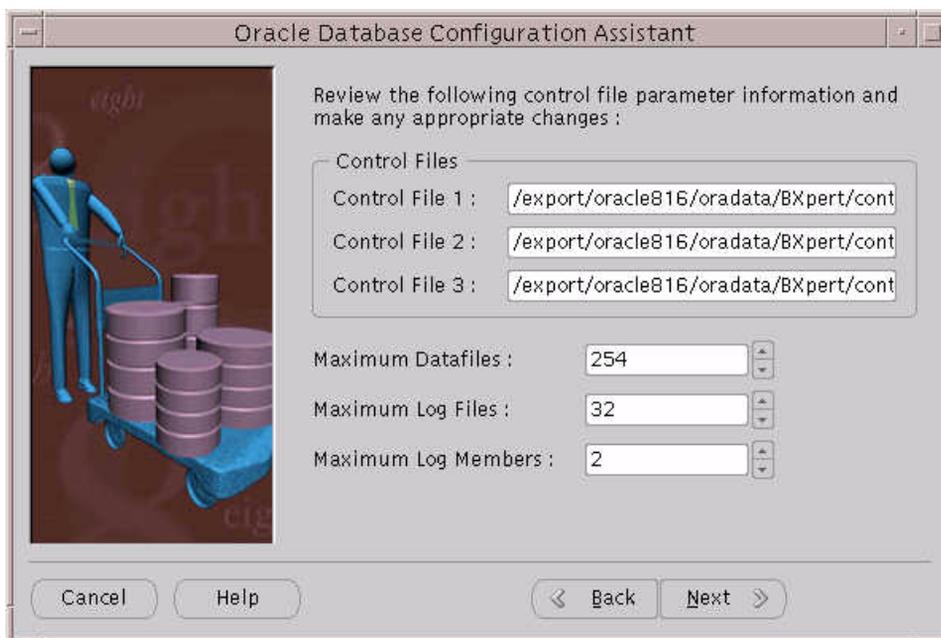
NOTE The following steps will create control, dbf and log files in the oradata/ORACLE_SID directory. By default, the oradata directory is located in ORACLE_HOME. If you do not have enough disk space, you might consider creating an oradata/ORACLE_SID directory on another disk and save the control, dbf and log files there.

8. Enter the location of the control files. The recommended parameters are:

Maximum Datafiles: 254

Maximum Log Files: 32

Maximum Log Members: 2



NOTE The next steps are for entering the tablespace information.

9. Enter the system tablespace information. The recommended parameters are:

Size (MB): 300

Auto Extend: OFF

Minimum Extent (KB): 128

%Increase: 0

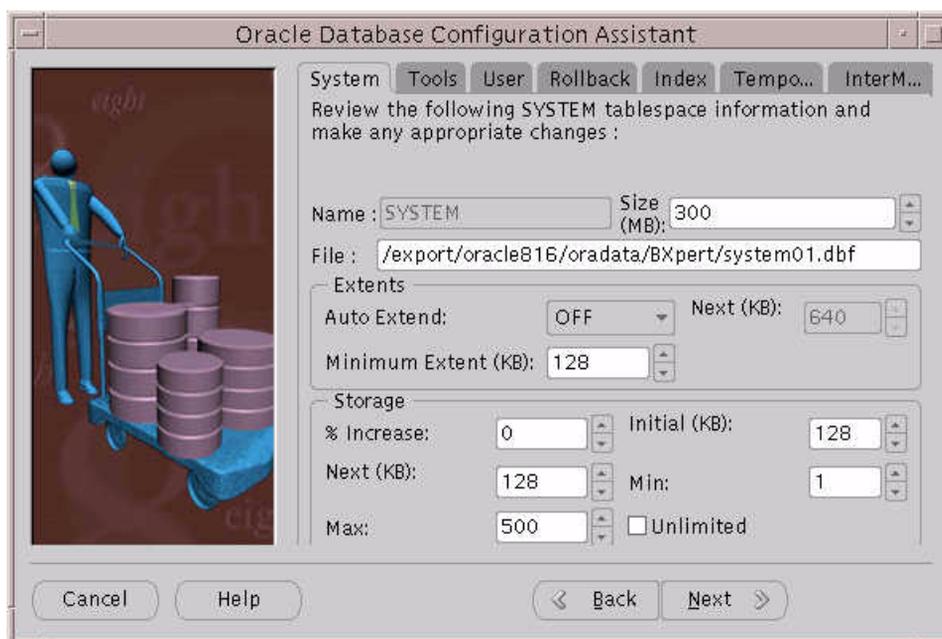
Initial (KB): 128

Next (KB): 128

Min: 1

Max: 500

Enter the location where you want to save the system01.dbf file and click Next.



- Click the Tools tab and enter the tools tablespace information. The recommended parameters are:

Name: TOOLS

Size (MB): 8

Auto Extend: OFF

Minimum Extent (KB): 128

%Increase: 0

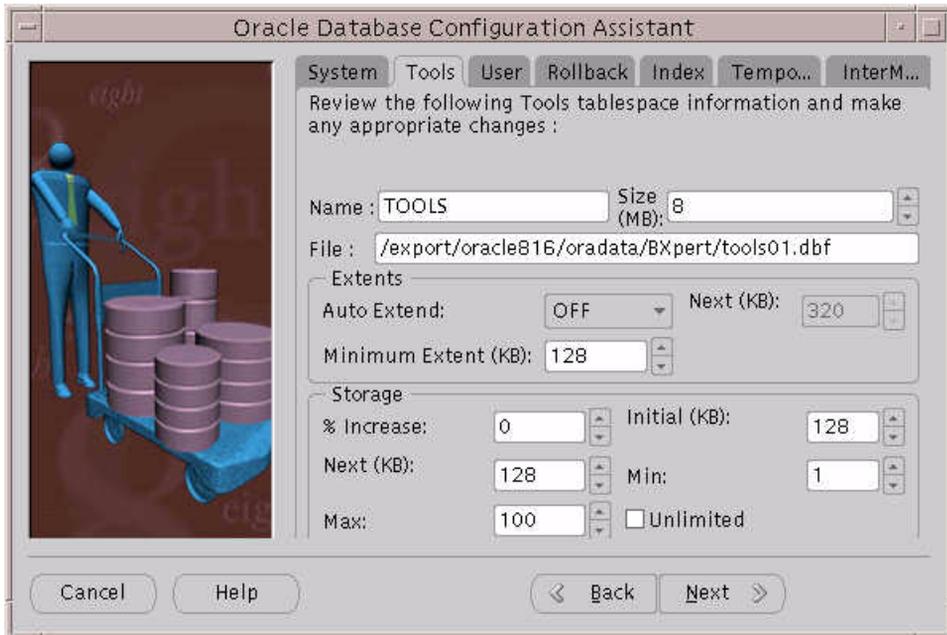
Initial (KB): 128

Next (KB): 128

Min: 1

Max: 100

Enter the location where you want to save the tools01.dbf file and click Next.



11. Click the User tab and enter the user tablespace information. The recommended parameters are:

Name: TS01

Size (MB): 500

Auto Extend: OFF

Minimum Extent (KB): 128

%Increase: 0

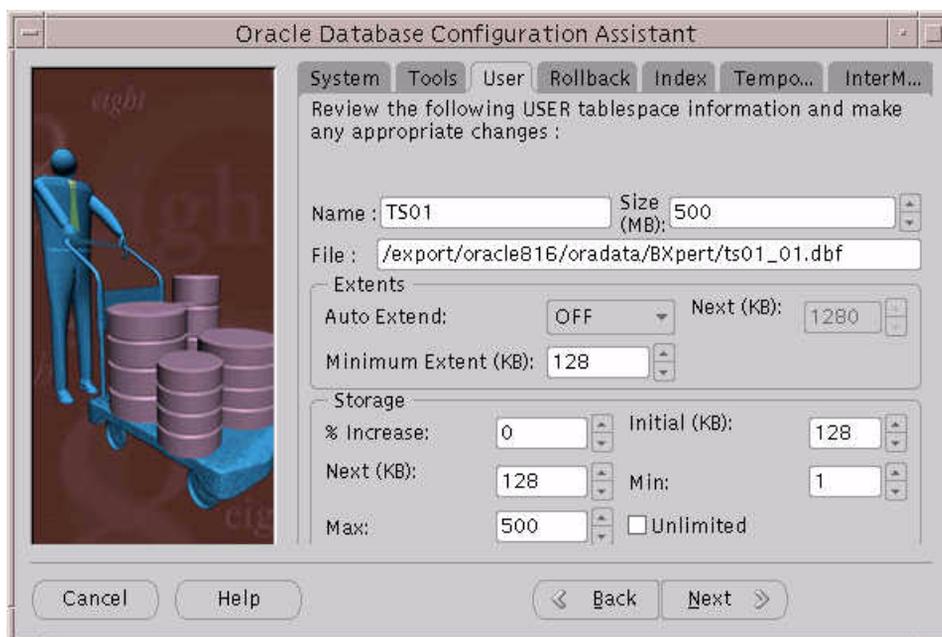
Initial (KB): 128

Next (KB): 128

Min: 1

Max: 500

Enter the location where you want to save the ts01.dbf file and click Next.



- Click the Rollback tab and enter the rollback tablespace information. The recommended parameters are:

NAME: RBS

Size (MB): 200

Auto Extend: OFF

Minimum Extent (KB): 2048

%Increase: 0

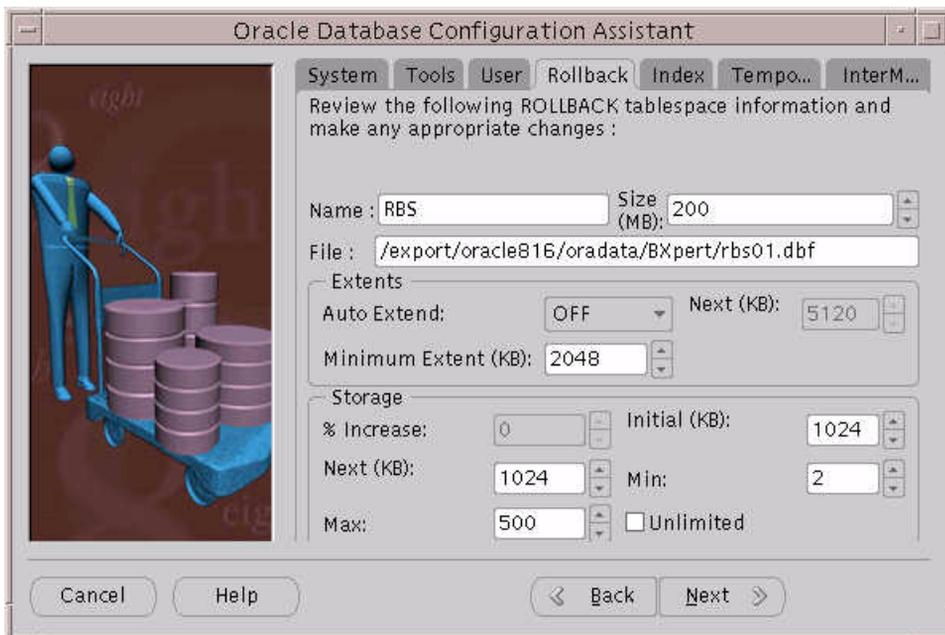
Initial (KB): 1024

Next (KB): 1024

Min: 2

Max: 500

Enter the location where you want to save rbs01.dbf file and click Next.



13. Click on the Index tab and enter the index tablespace information. The recommended parameters are:

Name: TS02

Size (MB): 200

Auto Extend: OFF

Minimum Extent (KB): 128

%Increase 0

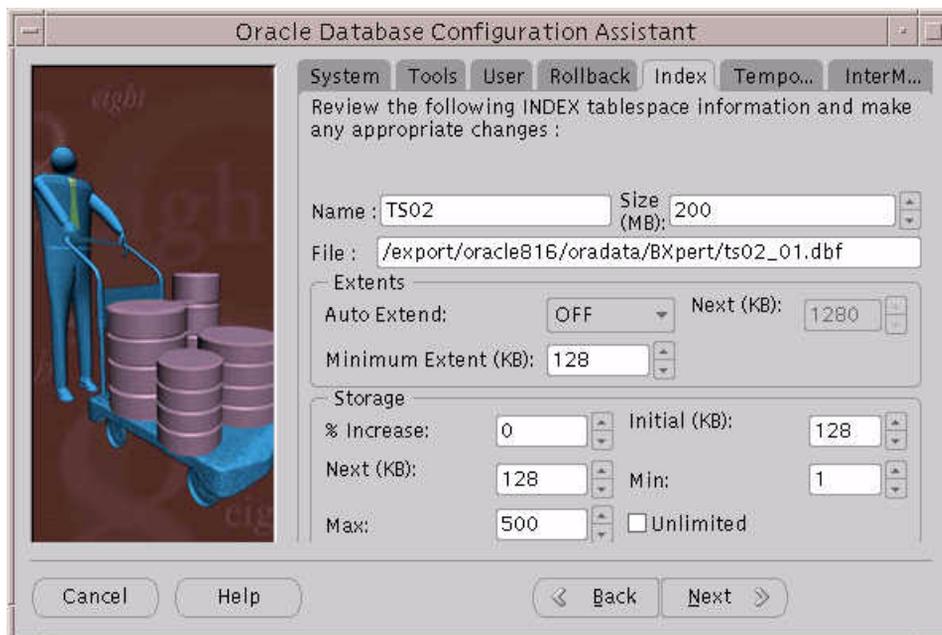
Initial (KB): 128

Next (KB): 128

Min: 1

Max: 500

Enter the location where you want to save the indx01.dbf file and click Next.



14. Click the Temporary tab and enter the temporary tablespace information. The recommended parameters are:

Name: TEMP

Size (MB): 100

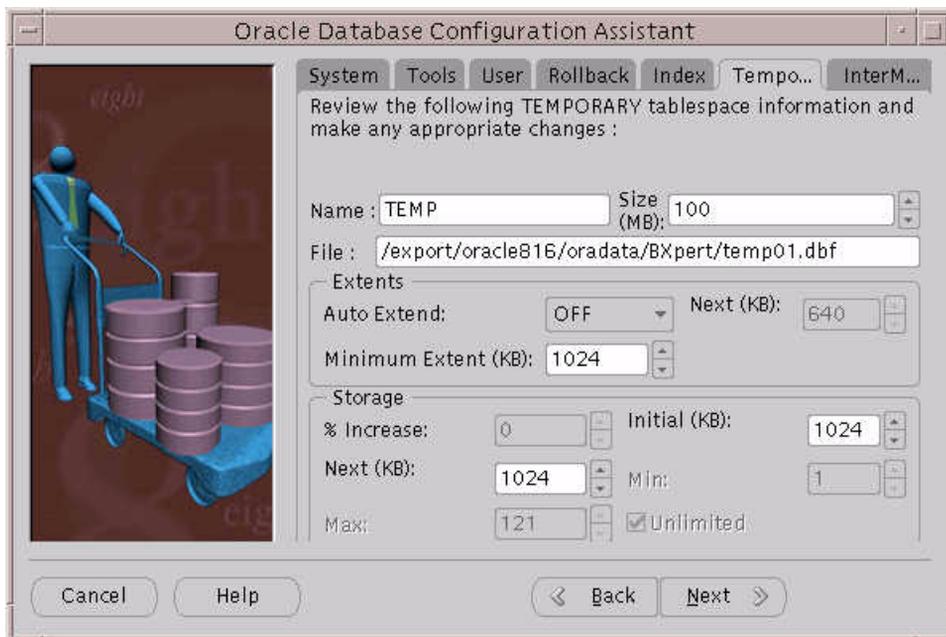
Auto Extend: OFF

Minimum Extent (KB): 2048

Initial (KB): 1024

Next (KB): 1024

Enter the location where you want to save the temp01.dbf file and click Next.



15. Click the InterMedia tab and enter the InterMedia tablespace information. The recommended parameters are:

Name: DRSYS

Size (MB): 300

Auto Extend: OFF

Minimum Extent (KB): 128

%Increase 0

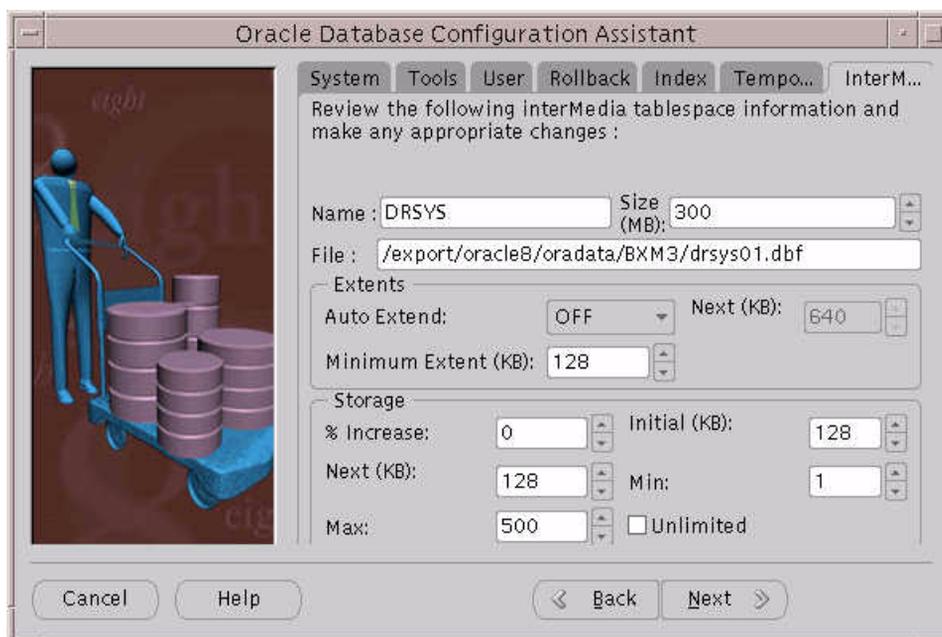
Initial (KB): 128

Next (KB): 128

Min: 1

Max: 500

Enter the location where you want to save the drsys01.dbf file and click Next.

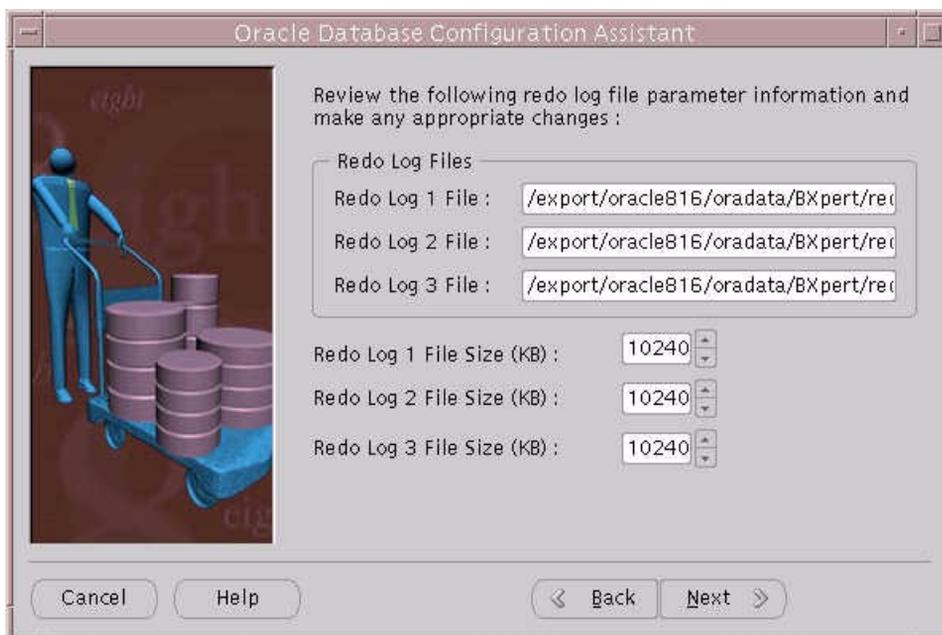


16. Enter the redo log file location and the file size. The recommended file sizes are:

Redo Log 1 File Size (KB): 10240

Redo Log 2 File Size (KB) 10240

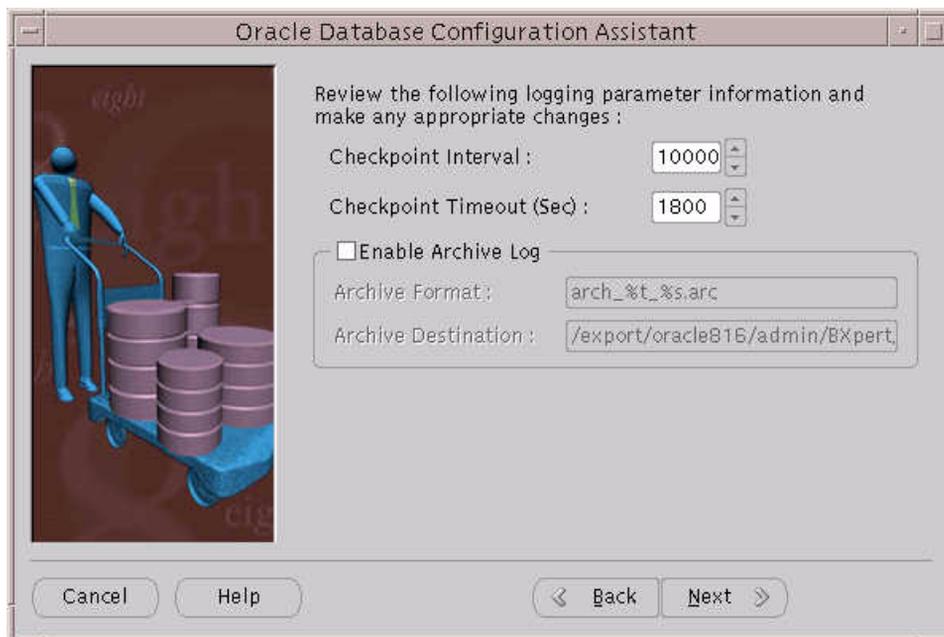
Redo Log 3 File Size (KB): 10240



17. Enter the login parameter information. The recommend parameters are:

Checkpoint Interval: 10000

Checkpoint Timeout (Sec): 1800



18. Enter the System Global Area (SGA) information. The recommended parameters are:

Shared Pool Size (Bytes): 115343336

Block Buffers: 10480

Log Buffer Size (Bytes): 163840

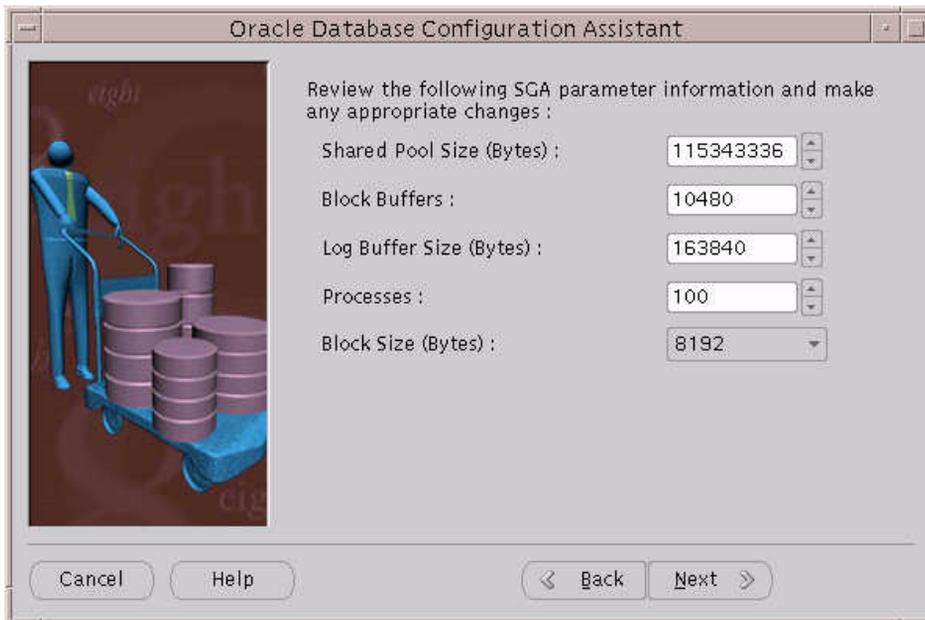
Processes: 100

Block Size (Bytes): 8192

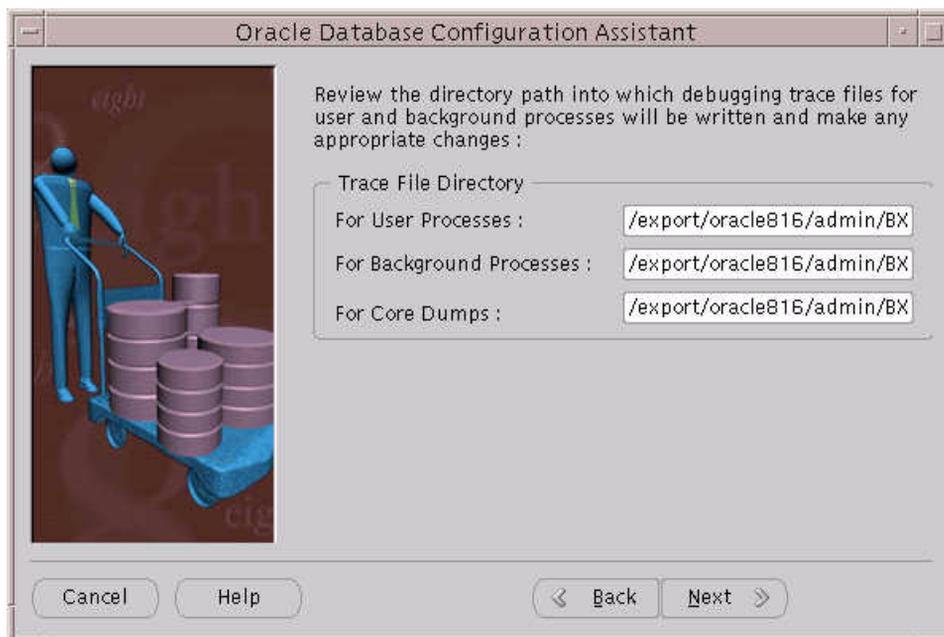
(block size is very important - make sure you have at least 8192 bytes)

NOTE The parameters on this screen impact the System Global Area (SGA) of your database. Each time an Oracle8i database instance is started, the SGA is allocated in memory. The SGA is a group of shared memory structures that contain data and control information for one Oracle8i database system. If multiple users are concurrently connected to the same database instance, the data in the SGA is shared among the users.

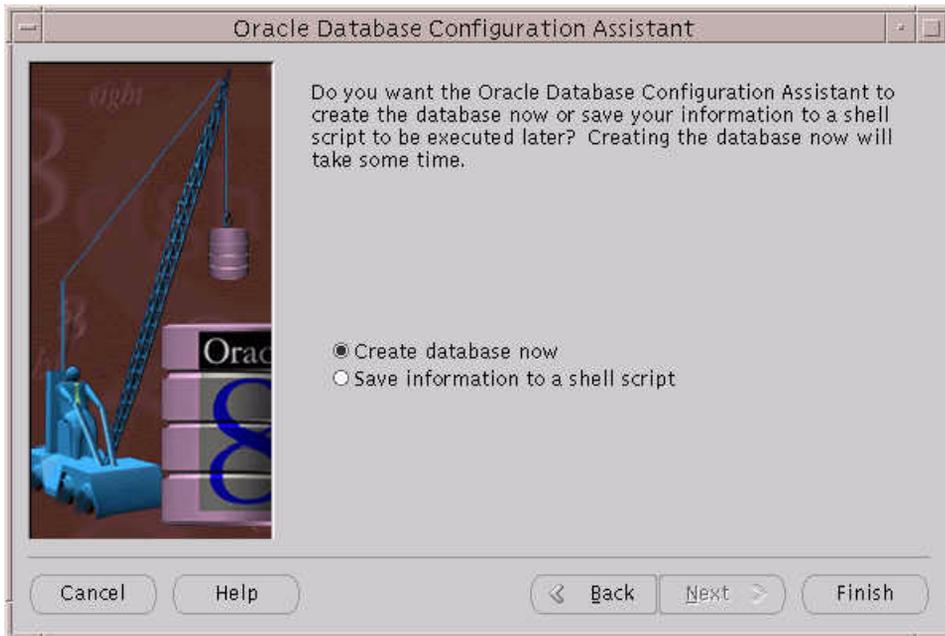
The default values that appear here for the SHARED_POOL_SIZE, DB_BLOCK_BUFFERS, DB_BLOCK_SIZE, and PROCESSES parameters are based on the number of concurrent users and database environment type (OLTP, DSS, or Hybrid) that you selected on previous screens.



19. Review the directory paths and make any appropriate changes. Click Next.



20. The final create a database screen displays. Select Create Database Now and click Finish.



This process may take approximately 2-3 hours.

21. After completion of creating the database instance, stop the oracle instance.

```
%svrmgrl
SVRMGRL> connect internal
SVRMGRL> shutdown immediate
SVRMGRL> quit
```

22. To make sure listener is running:

```
%lsnrctl status
```

23. If listener is not running, start the listener by typing:

```
%lsnrctl start
```

24. In the `init<ORACLE_SID>.ora` file located in `ORACLE_HOME/admin/XXX/pfile` directory make the following modifications:

```
#change open_cursors to 300
```

```
open_cursors = 300
#uncomment rollback_segments, where x can go up to 25
rollback_segments = ( RBS0, RBS1, RBS2, RBS3, RBS4, RBS5, RBS6,
...RBSx )
#modify or add optimizer_max_permutation and set it to 1000
optimizer_max_permutations = 1000
#Verify that remote login is commented
#remote_login_passwordfile=exclusive
#remove or comment out the line
#NLS_NUMERIC_CHARACTER = ",."
```

25. Restart the database instance:

```
%svrmgrl
SVRMGRL> connect internal
SVRMGRL> startup
SVRMGRL> quit
```

This concludes the Oracle installation.

Create an Oracle Instance

Installing iPlanet Servers Software

This chapter provides installation procedures for the iPlanet Web Server (iWS) and the iPlanet Application Server (iAS) software that you must install before installing BuyerXpert.

NOTE This is information as it pertains to installing and operating BuyerXpert only; for detailed information on these software programs, see:

<http://docs.iplanet.com/docs/manuals/index.html>

The following sections are contained in this chapter:

- What You Should Know About the iPlanet Application Server
- Installing iPlanet Web Server (iWS)
- Installing Actuate
- Installing iPlanet Application Server (iAS)
- Configuring the Process Manager

When you follow these procedures to install the servers software, you will be able to install BuyerXpert with sample data. If you do not wish to use sample data but your own data, see the *BuyerXpert Deployment Guide* for instructions.

What You Should Know About the iPlanet Application Server

The iPlanet Application Server (iAS) is the primary engine of BuyerXpert. The Application Server goes one-step further than the web-enablement functionality of the Web Server by providing powerful transaction processing features, and integrates with existing information systems and applications.

Application Server Components

The following describes the components that install with the iPlanet Application Server:

- The Application Server includes the Administration Server, the Web Connector plug-in used to communicate between the iPlanet Application Server and the Web Server, and the Deployment Tool.
- The Console provides the common user interfaces for all iPlanet server products. It allows you to perform common server administration functions such as stopping and starting servers, installing new server instances, and managing user and group information. The Console can be installed by itself (standalone) on any machine on your network and used to manage remote servers.
- The Administration Server is a common front-end to all iPlanet servers. It receives communications from the Console, and sends them on to the appropriate iPlanet server. Your site will have at least one Administration Server for each server root in which you have installed an iPlanet server.
- The Directory Server is iPlanet's LDAP implementation. The Directory Server runs as the slapd service on an NT machine, and ns-slapd on Solaris. This server manages the directory databases and responds to client requests.

Installing iPlanet Web Server (iWS)

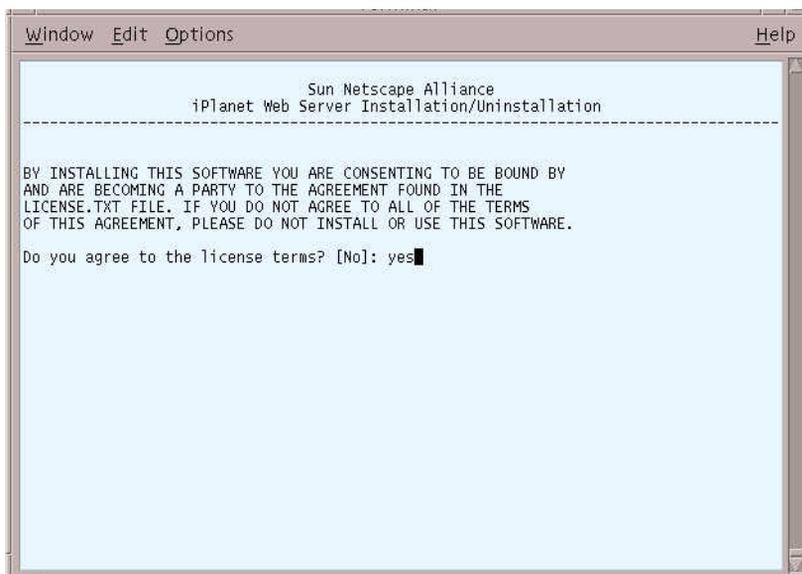
NOTE Before installing iWS, make sure you are in the right user and group. If not, create the user and group.

To install iWS:

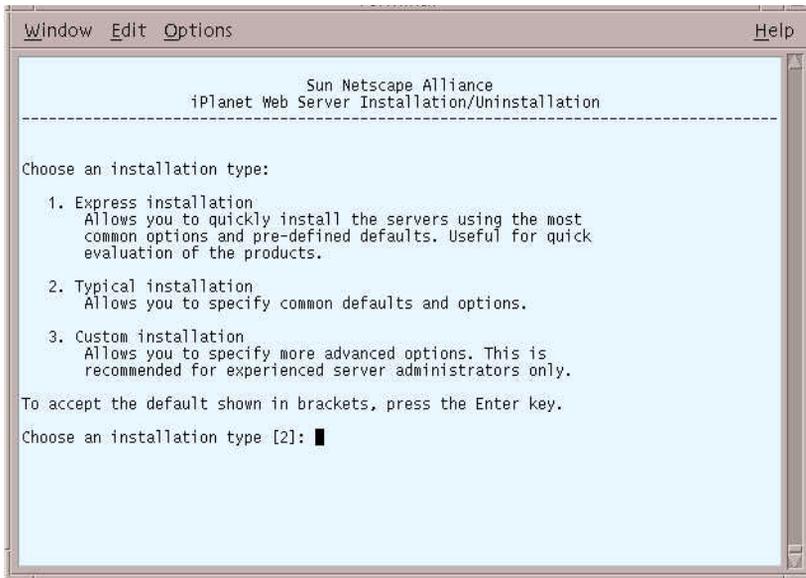
1. Unpack the iWS distribution and run the setup executable to launch the installer:

```
# gzcat IWS_tar_file.tar.gz|tar xvf -  
# ./setup
```

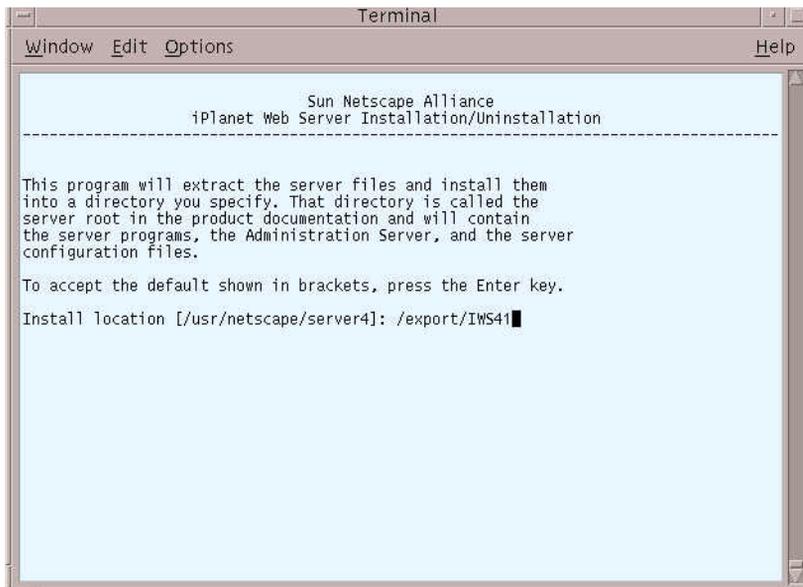
2. The Welcome screen displays. Press Enter to continue.
3. The Licensing Agreement screen displays. Type **yes** to continue.



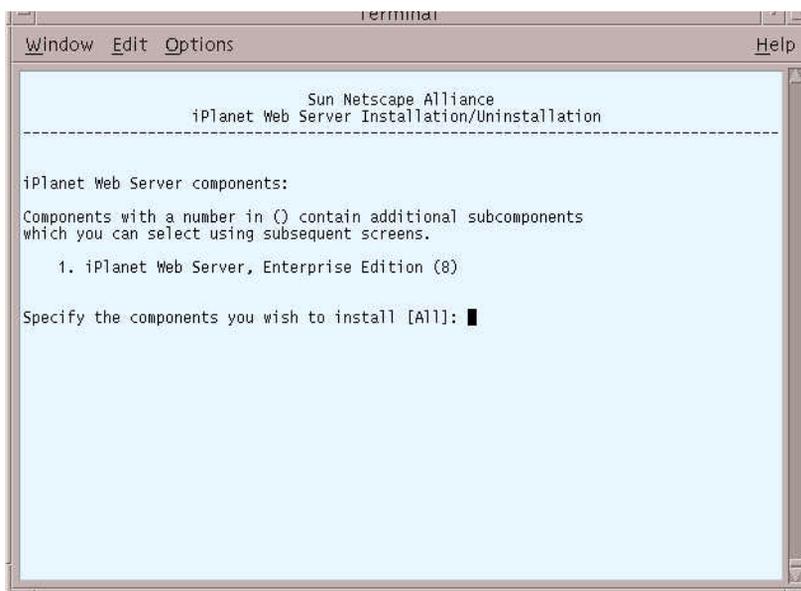
4. The Installation Type screen displays. Press Enter to accept a typical install.



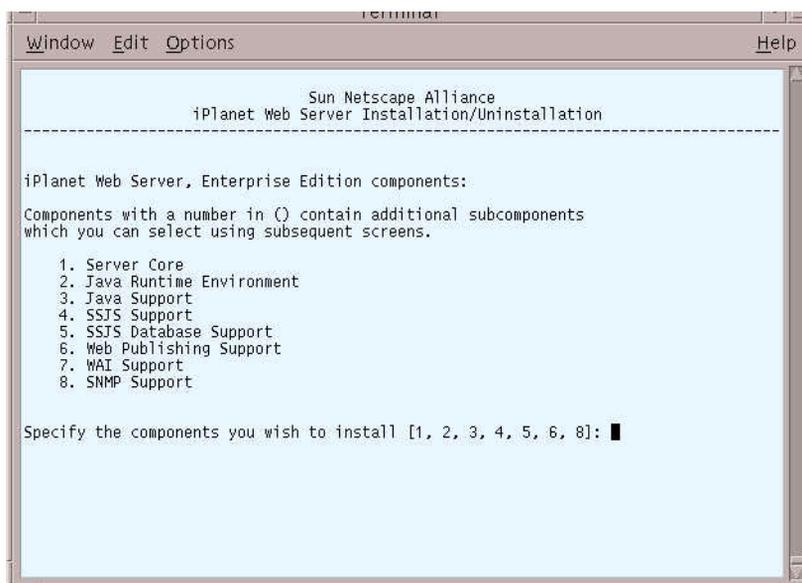
5. The Extracting Server Files screen displays. Type the location where you want to install iWS. The installer will create this directory.



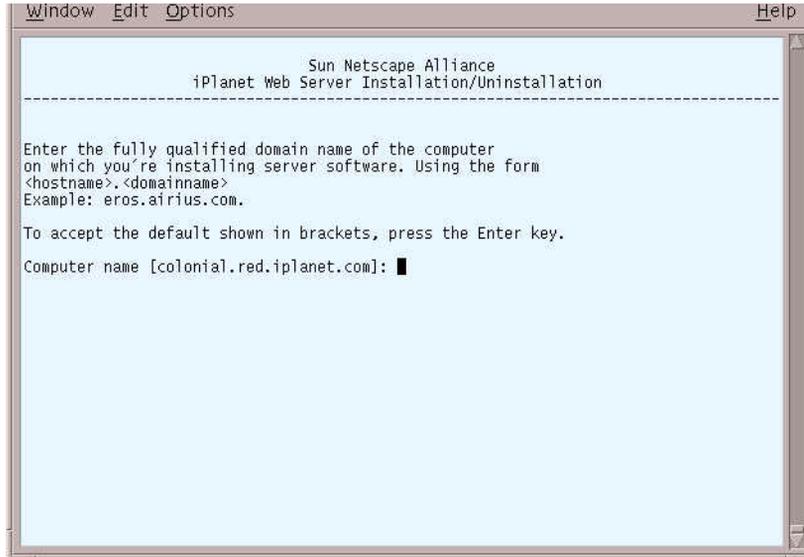
6. The Web Server Component screen displays. Press Enter to specify all the components.



7. The Additional Web Server Components screen displays. Press Enter to specify all the components listed.



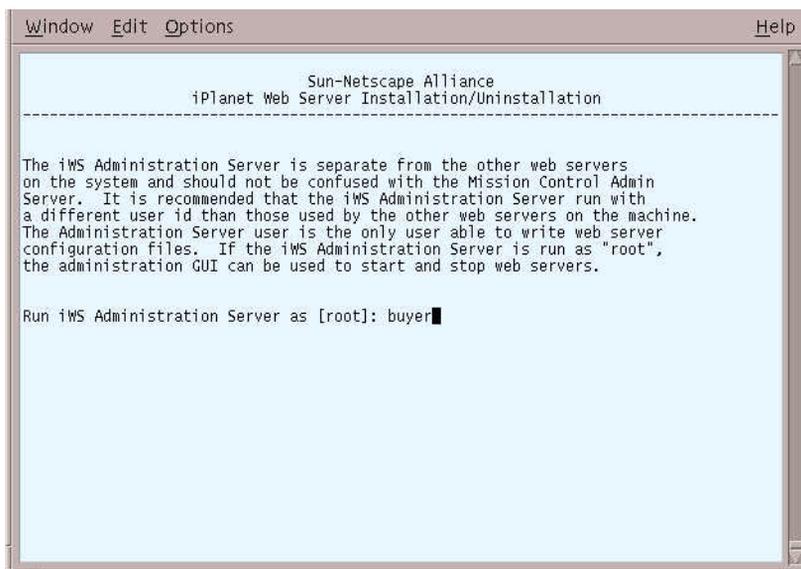
8. When this screen displays, read the instructions, verify that this is the correct computer name and press Enter. If it is not, enter the correct domain and press Enter.



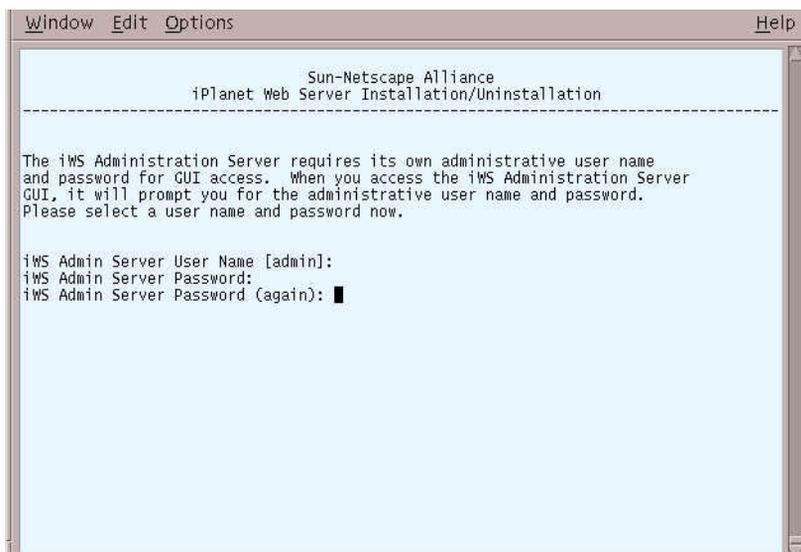
9. The Choosing a Unix User and Group screens display. The default should be chosen only if you want iWS to use the displayed Unix user and group to run iWS. Press Enter to accept the default or enter a Unix user and group.



10. The iWS Administration Server User Name screen displays. Press Enter to accept the default, or enter a new iWS username (buyer is the example shown).



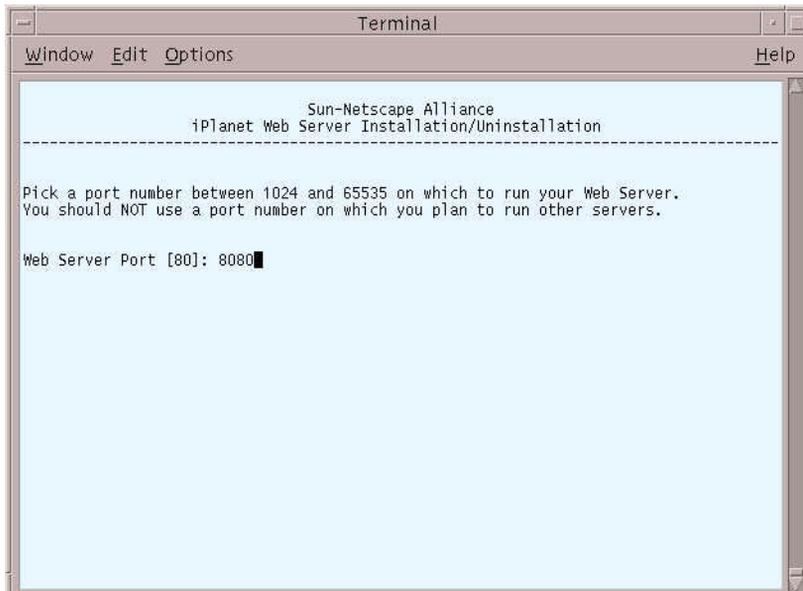
11. Create a password and enter it twice. This password will be used to access the administration of iWS.



- At the next screen, type your iWS administration server port number. You can use the default port number, 8888.

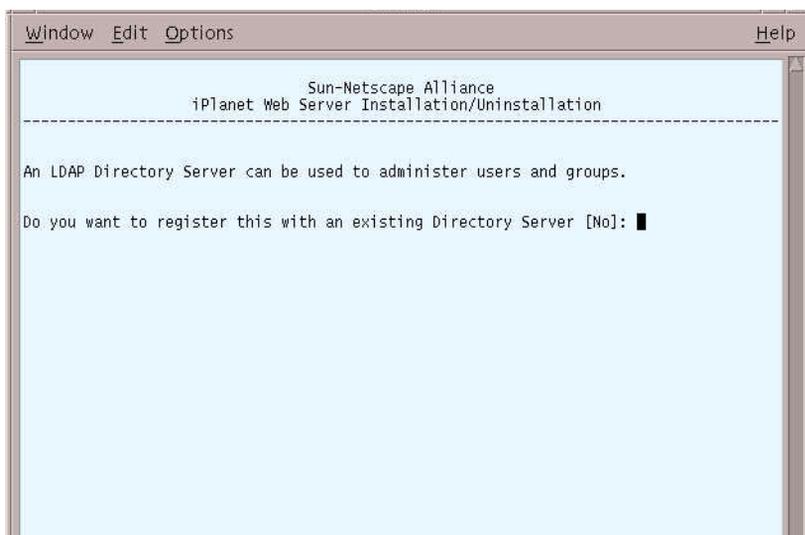


- At the next screen, enter your iWS port number. The default shown is 8080.



14. The LDAP Directory Server screen displays. If other iPlanet products have been installed on this network, you can unify the administration of the separate servers by typing `y` and entering the necessary information.

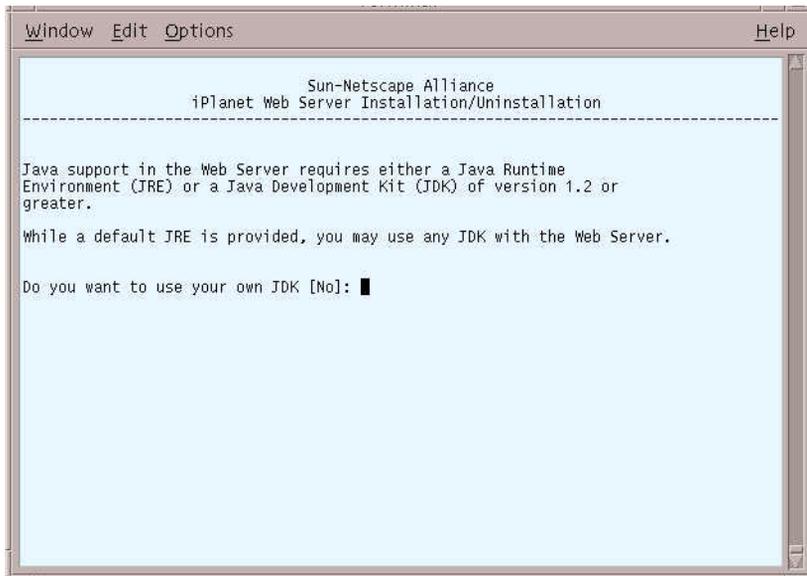
Press Enter if you do not want to register this directory server.



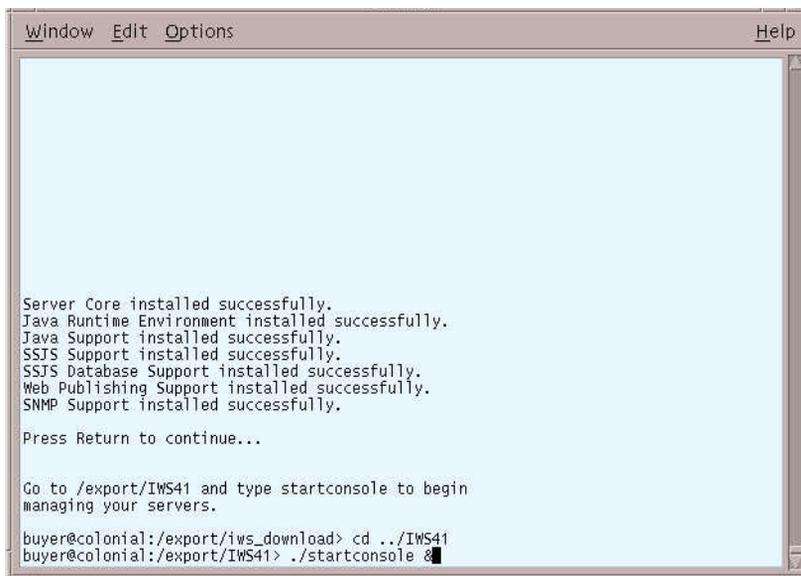
15. At the next screen, press Enter to accept the default, which is the location of the documents for iWS.



16. The Java Support screen displays. BuyerXpert does not run from the Java Development Kit (JDK) that is installed with this step and will not be affected by what you select from this screen. Press Enter if you want to use the JDK provided. Type γ if you want to use your own JDK.



17. At the end of installation, the following messages display:



```

Window Edit Options Help
Server Core installed successfully.
Java Runtime Environment installed successfully.
Java Support installed successfully.
SSJS Support installed successfully.
SSJS Database Support installed successfully.
Web Publishing Support installed successfully.
SNMP Support installed successfully.

Press Return to continue...

Go to /export/IWS41 and type startconsole to begin
managing your servers.

buyer@colonial:/export/iws_download> cd ../IWS41
buyer@colonial:/export/IWS41> ./startconsole &

```

18. Press Enter to continue.

The iWS is now running.

TIP If you have your browser caching mechanism set to Never, the most up-to-date contents do not always display.

Setting a no cache directive in iWS (to tell the browser not to cache the pages) solves this problem.

To set this:

1. Go to the admin server of iWS.
 2. Select the right instance of iWS and click Manage Server.
 3. Click Content Management.
 4. Click Cache Control Directives (last item in the menu on the left).
 5. Set the Directives to No Cache and click OK.
 6. Click Save and Apply and check that the directive has been saved correctly.
-

Installing Actuate

See the Actuate installation instructions, located on the iPlanet CommerceXpert Actuate Desktop Products ReportCast CD. There are two PDF files in the directory `actuate_4/manuals/directory` named `reportcast-unix-install.pdf` and `server-unix-install.pdf`.

NOTE In order for the BuyerXpert installation script to configure the Actuate instance, it is recommended that you install Actuate on the same machine and with the same user as the BuyerXpert installation. Otherwise, you must manually convert Actuate to run with BuyerXpert.

Installing iPlanet Application Server (iAS)

NOTE Make sure you are in the right user and group before installing iAS. You must install iAS as the same user you use to install BuyerXpert. See the *BuyerXpert Deployment Handbook* if you are installing iAS as `root`.

NOTE These steps contain information as it pertains to installing and operating BuyerXpert only. For more detailed information on installing iAS, see:

<http://docs.iplanet.com/docs/manuals/index.html>

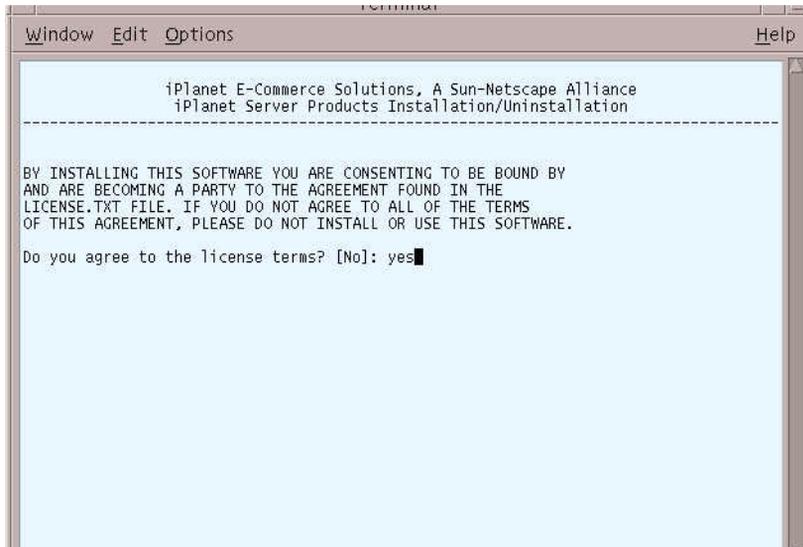
To install iAS:

1. Unzip and set up the iAS file:

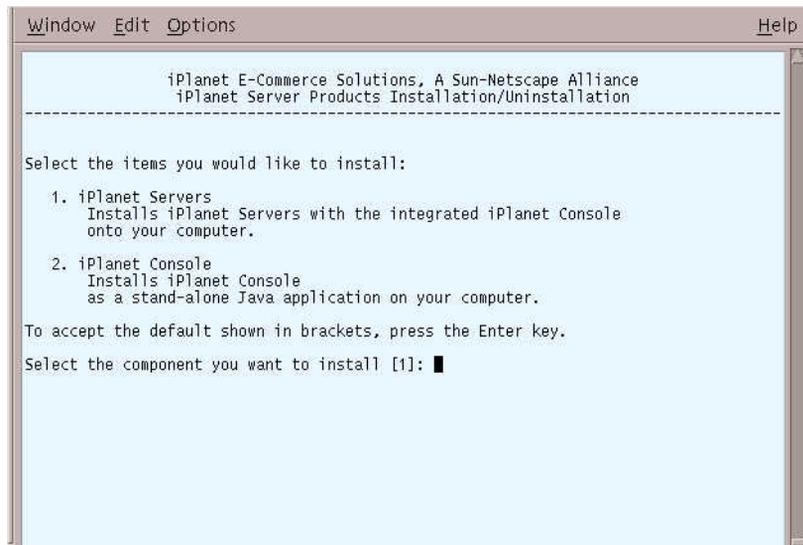
```
# unzip pae60sp1_iassp2_solaris.zip
# cd installer
# ./setup
```

2. The Welcome screen displays. Press Enter to continue.

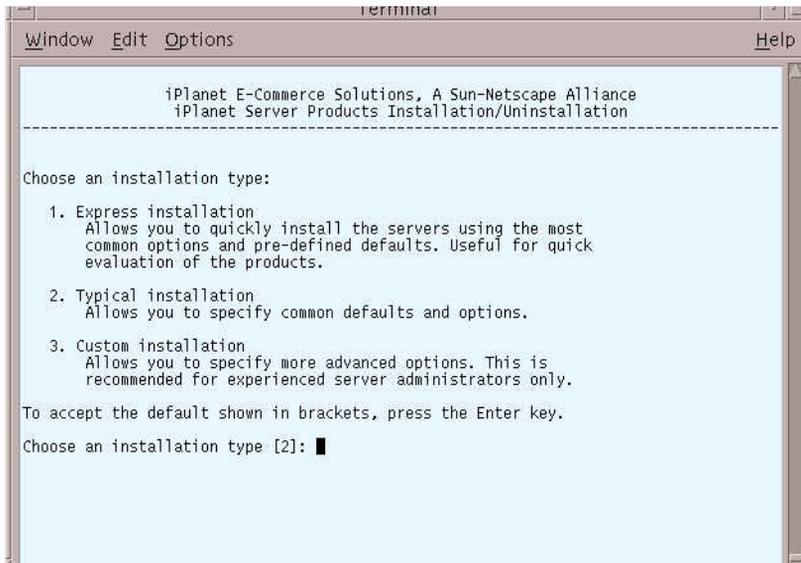
3. The Licensing Agreement screen displays. Type `yes`.



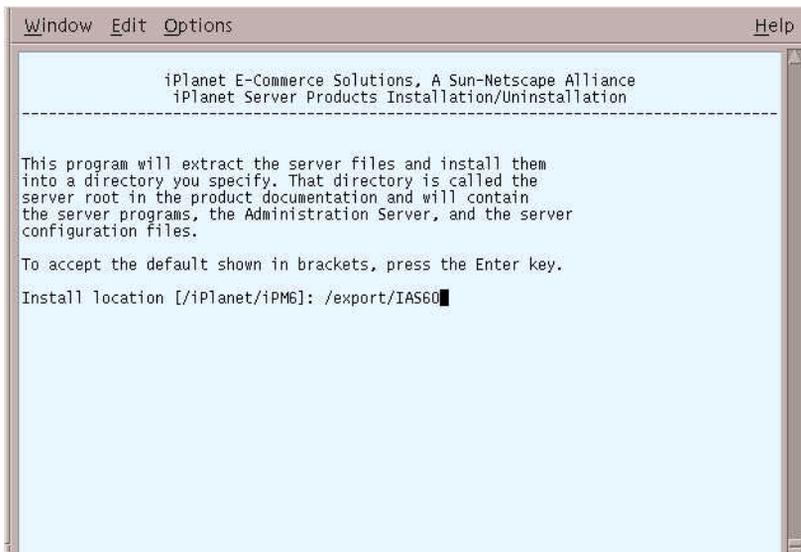
4. The Install Items screen displays. Press Enter to accept iPlanet servers.



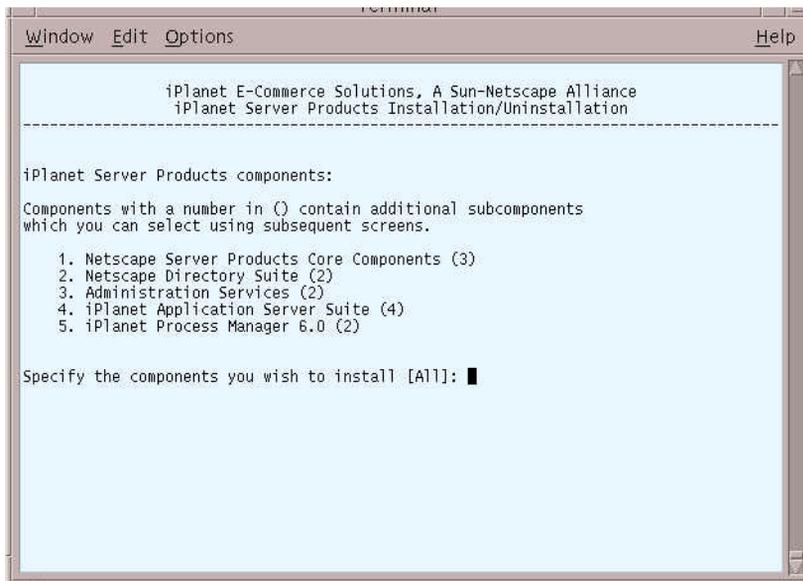
5. The Installation Type screen displays. Press Enter to accept a typical installation.



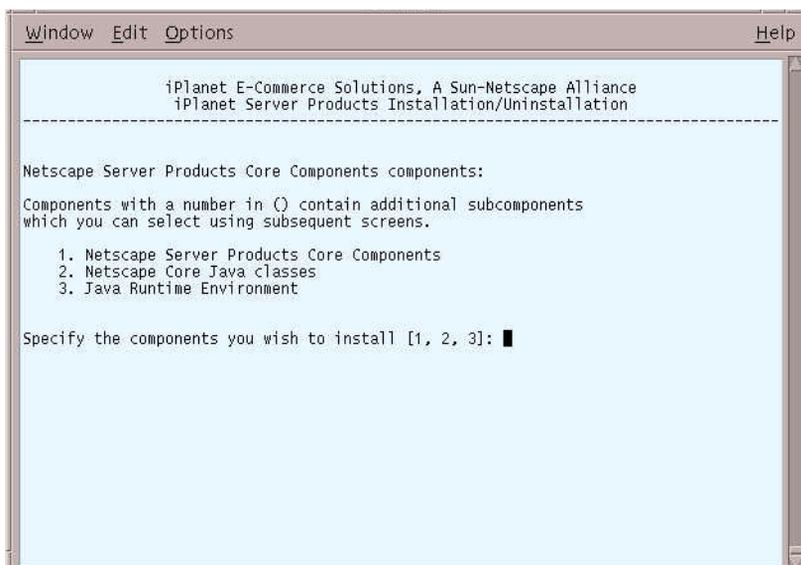
6. The Extract Server Files screen displays. Type `/export/IAS60` or the location you want to install iAS.



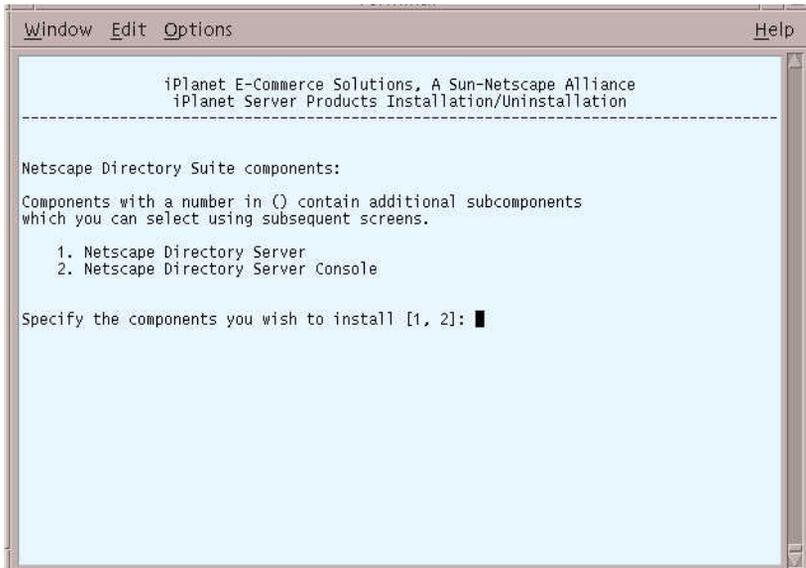
7. The Server Products screen displays. Since BuyerXpert will need all the components listed, press Enter.



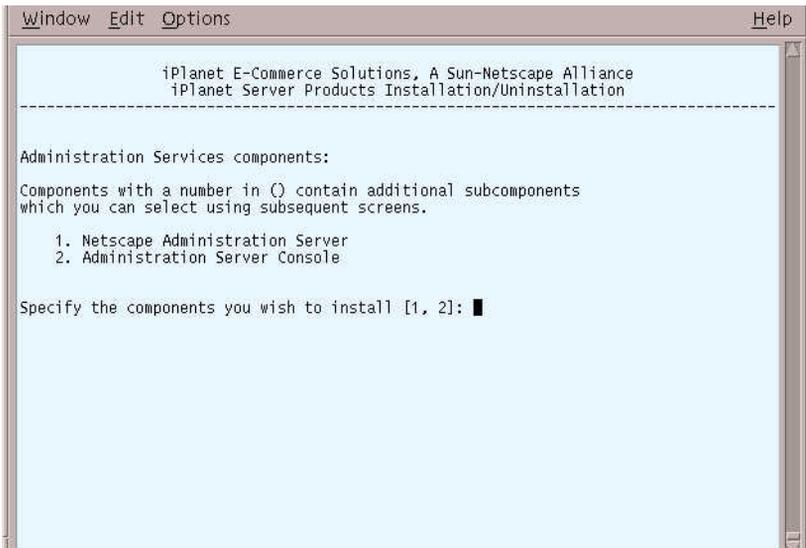
8. The Server Family Core Components screen displays. Press Enter to specify all the components listed.



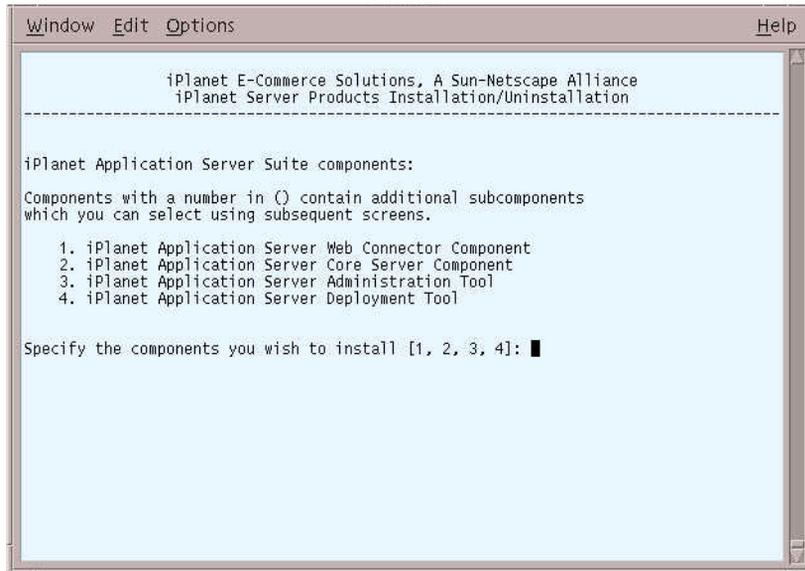
9. The Directory Suite Components screen displays. Press Enter to specify all the components listed.



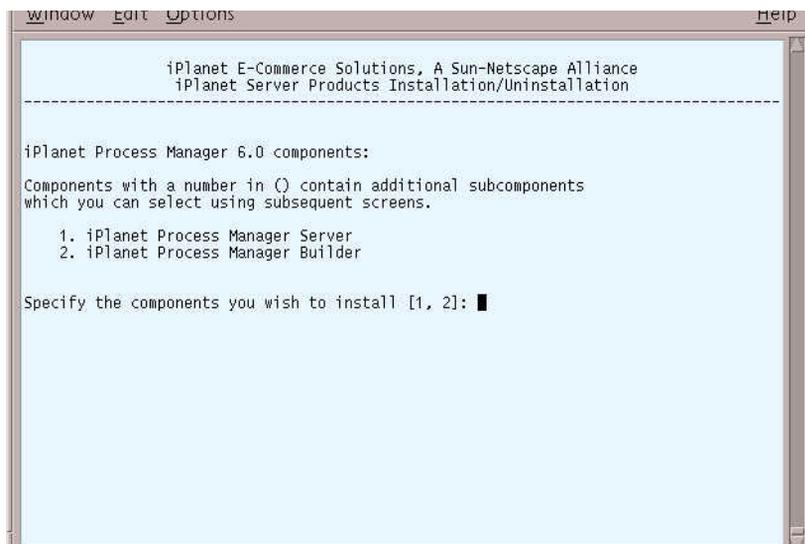
10. The Administrative Services screen displays. Press Enter to specify all the components listed.



- 11. The Application Server Suite Components screen displays. Press Enter to specify all the components listed.**



- 12. The Process Manager Components screen displays. Press Enter to specify all the components listed.**



13. The Domain Name screen displays. Enter the domain name where you are installing the server software. See section Installing iPlanet Web Server (iWS), Step 8.



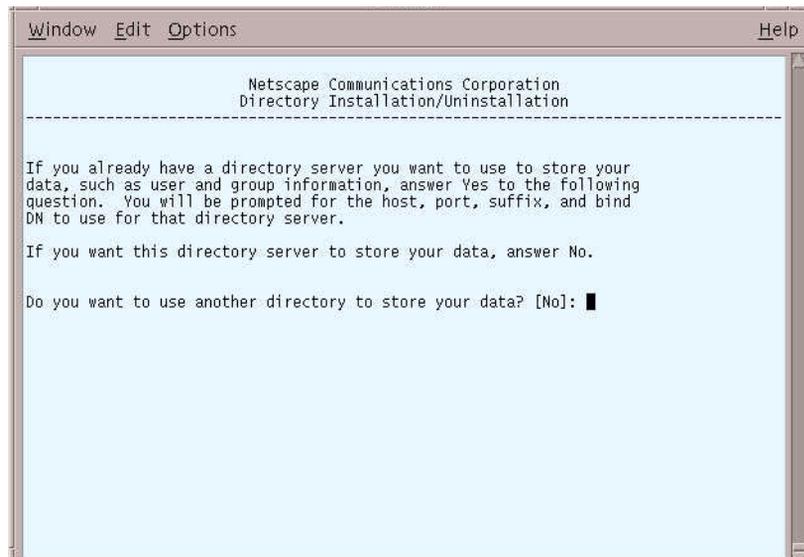
14. The Unix User and Group screen displays. Enter the system user and group name that was created in the section, Installing iPlanet Web Server (iWS), Step 9.



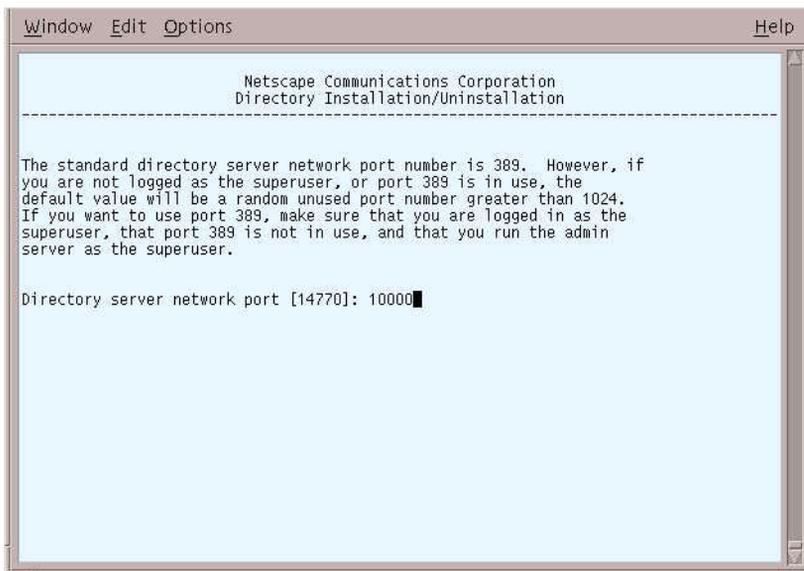
15. The Configuring Server screen displays. Type **yes** if you want to register this software or press **Enter** if you do not.



16. The Store Directory Server screen displays. Press **Enter** to continue.



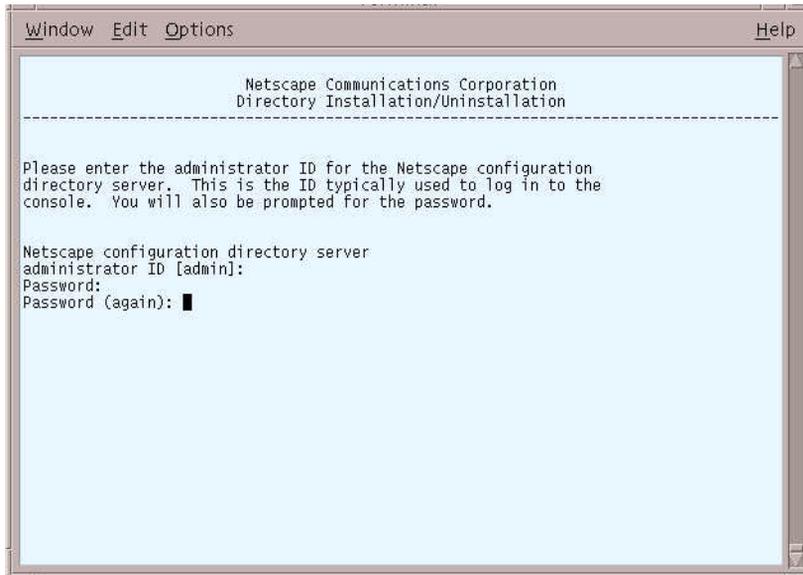
17. The Directory Server Network Port screen displays. Type 10000 or other port number.



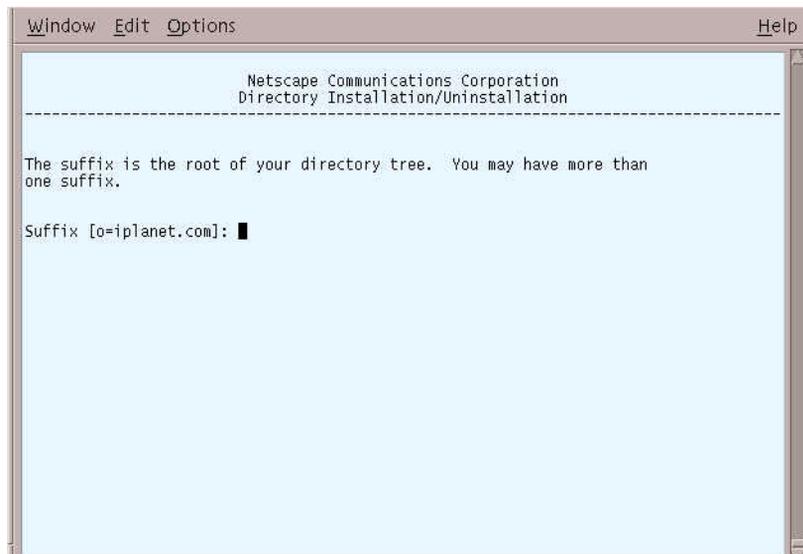
18. The Directory Server Identifier screen displays. Press Enter to accept the default.



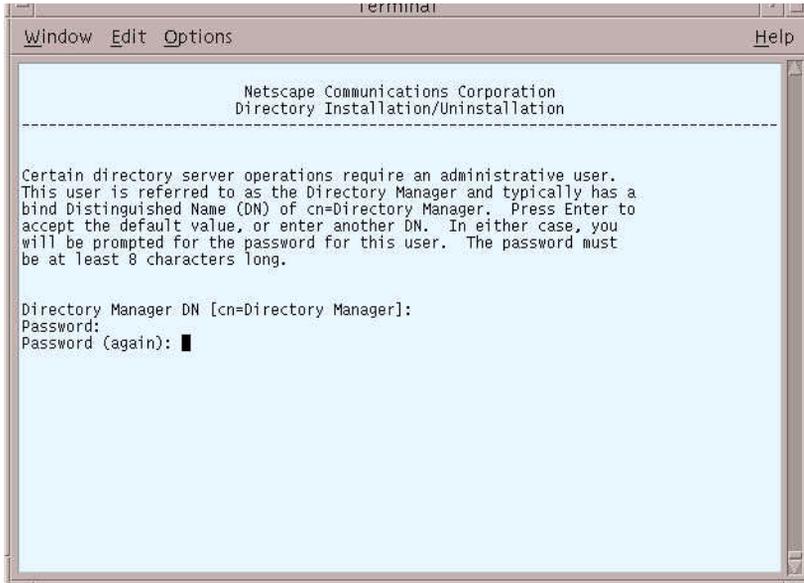
19. The Administrator ID screen displays. Enter your administrator ID, your password, and the password again.



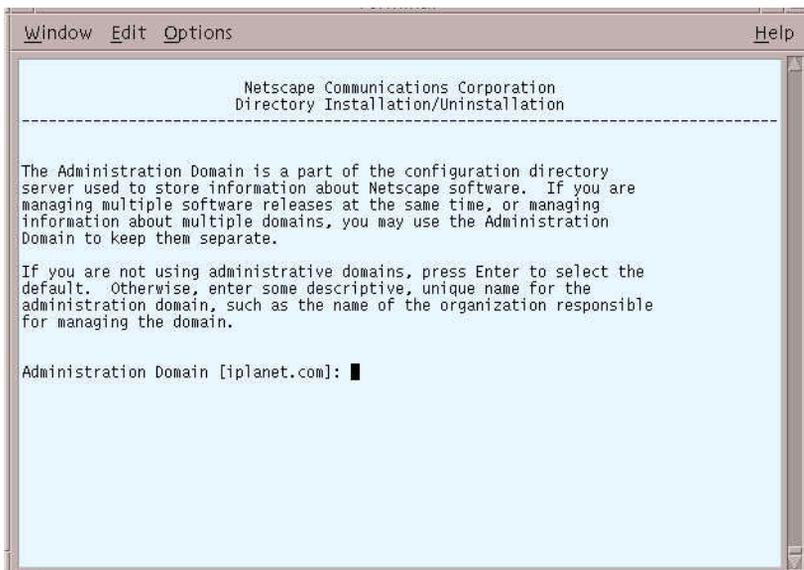
20. The Directory Tree Suffix screen displays. Enter a suffix for this installation, for example, `o=bxinstall.com`.



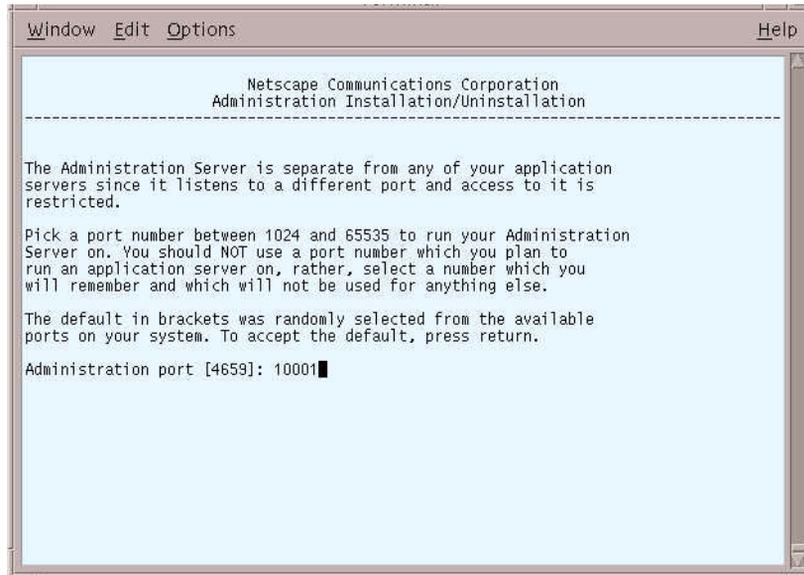
21. The Directory Manager Distinguished Name (DN) screen displays. Press Enter to accept the default Directory Manager DN, then enter your password and the password again.



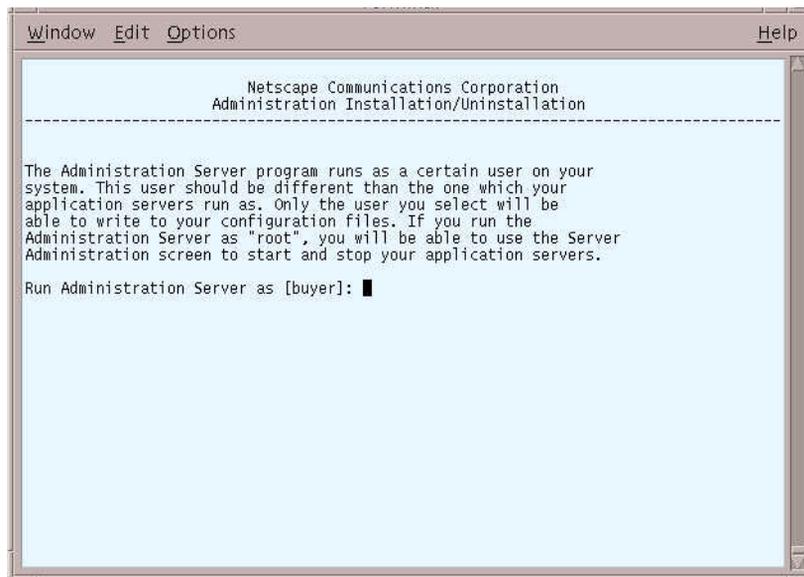
22. The Administration Domain screen displays. You must use `iplanet.com`.



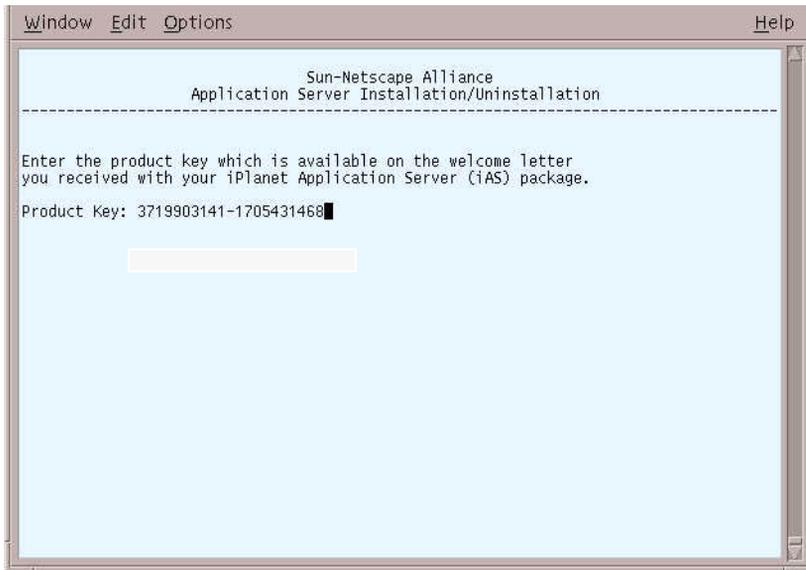
- 23. The Administration Server Port screen displays. Type 10001 or your port number.**



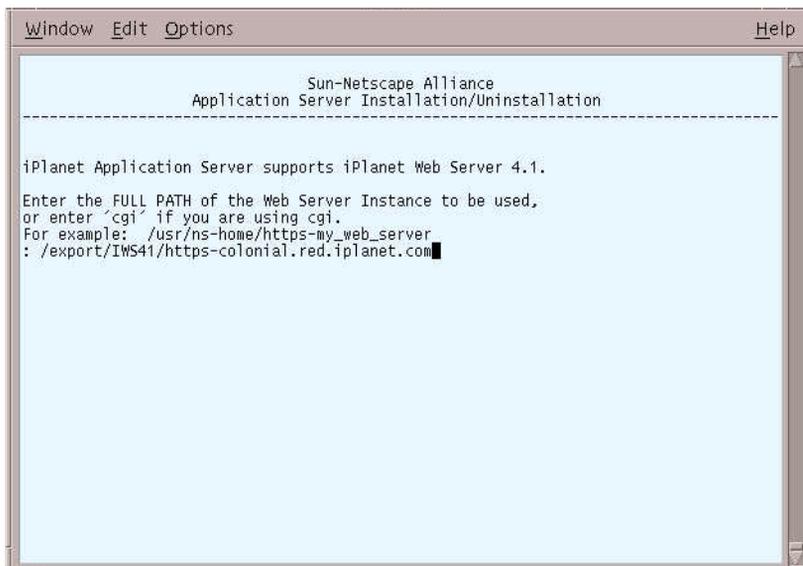
- 24. The Administration Server screen displays. Press Enter to accept the default.**



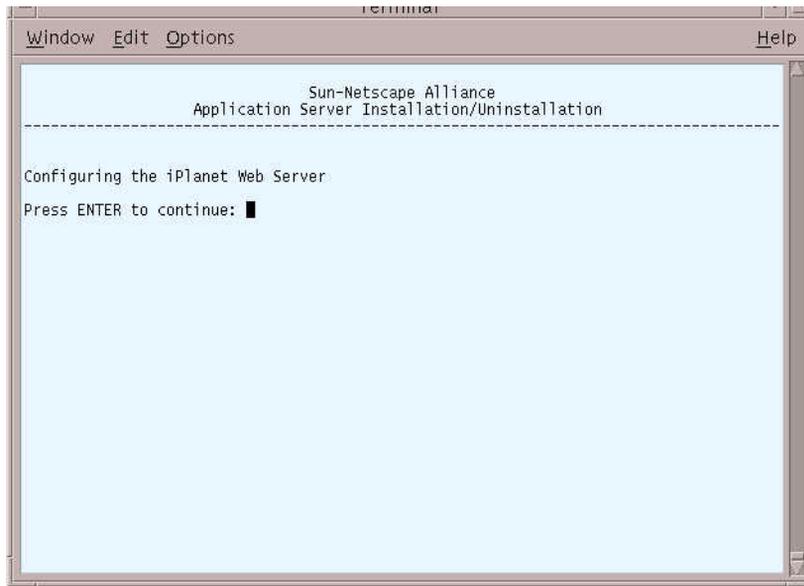
25. At the next screen, enter your product key (iAS serial number).



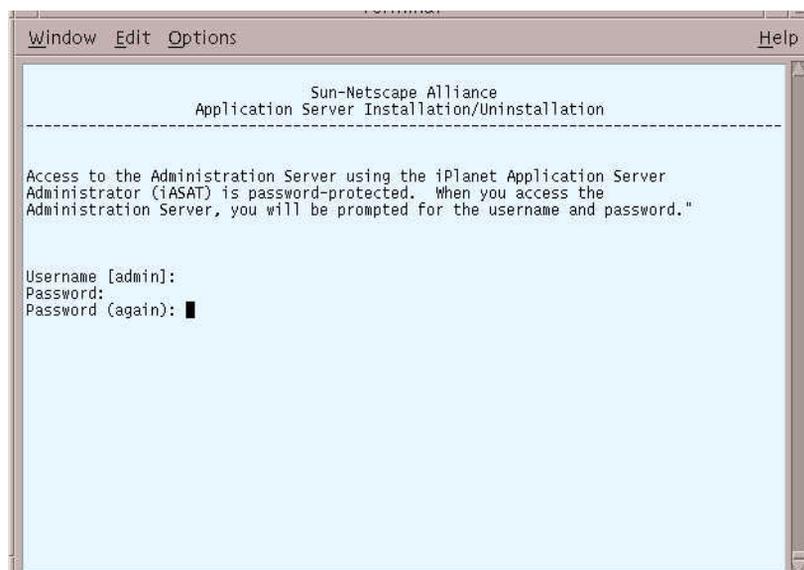
26. The Web Server Instance screen displays. Enter the web server instance location where iWS is installed.



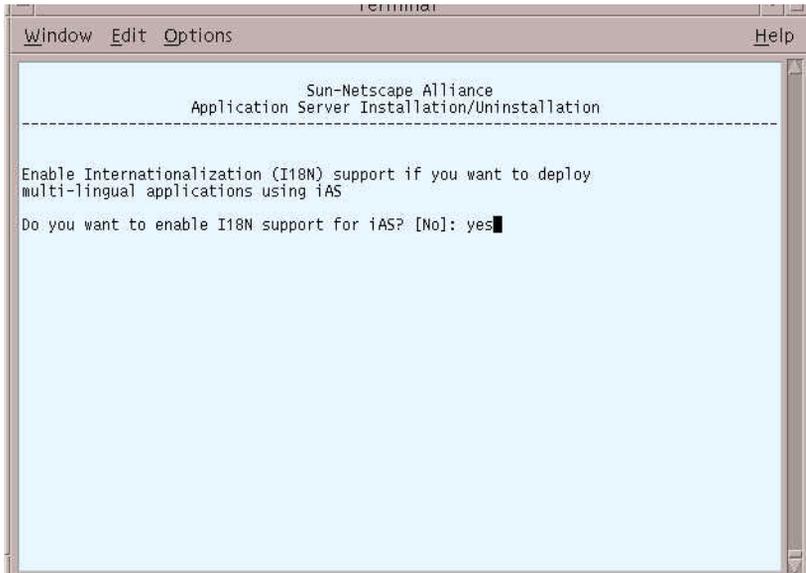
27. The next screen displays with this message: **Configuring the iPlanet Web Server**. Press Enter to continue.



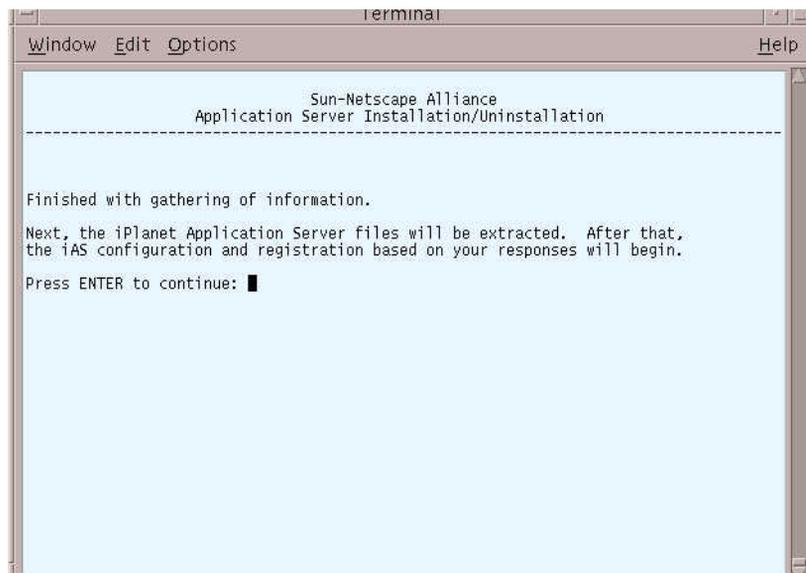
28. The Administration Server Username and Password screen displays. Enter your administration server username, your password, and the password again.



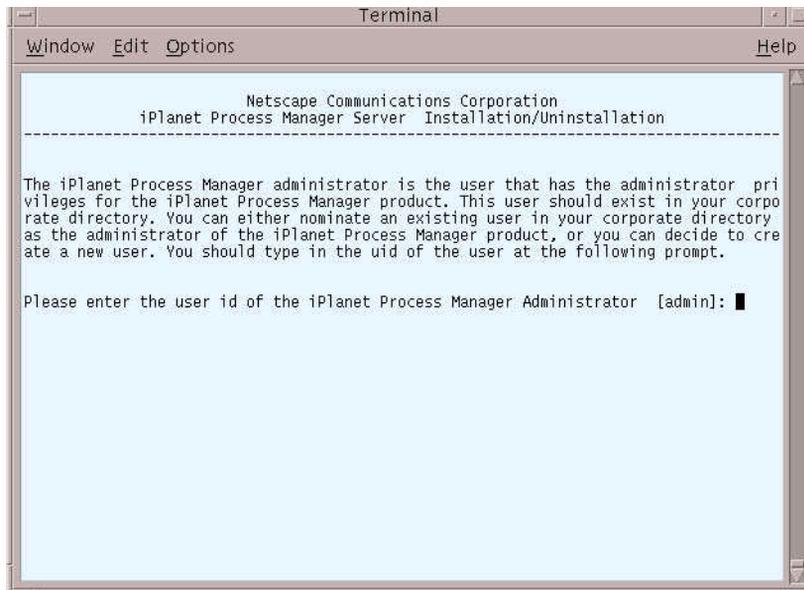
29. The Enable Internationalization screen displays. Type **yes** to enable international support for iAS.



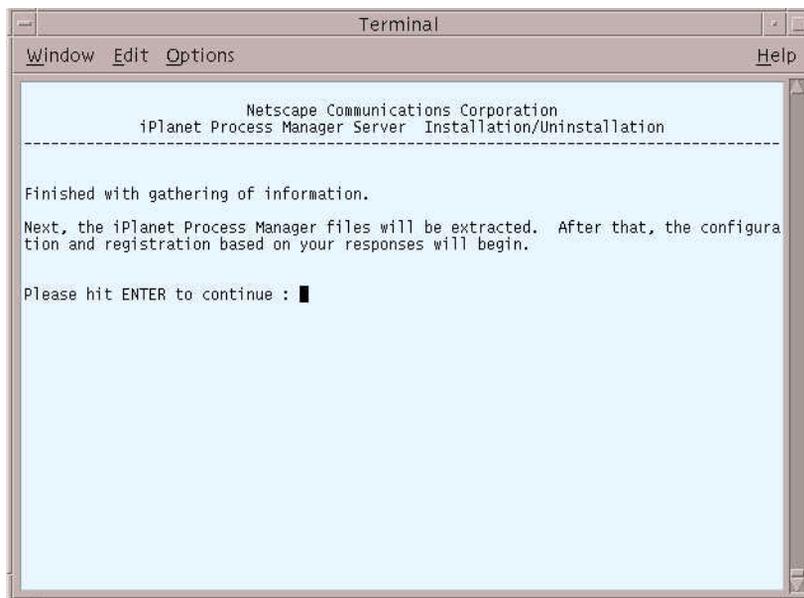
30. When this screen displays, press **Enter** to continue.



31. The Process Manager Administrator User ID screen displays. Enter the user ID of the Process Manager administrator or press **Enter** to accept the default.



32. The installer has finished gathering information. Press Enter to continue.



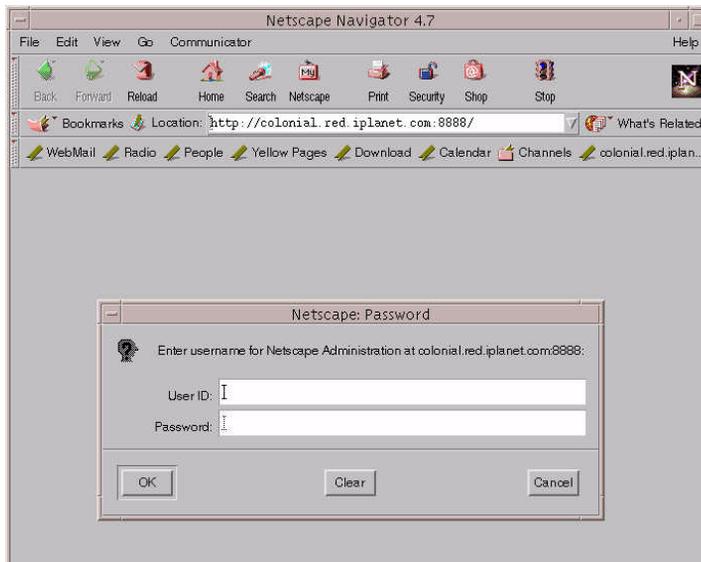
33. This installation will take several minutes.

TIP To find out the what version of iAS you are running, type `./version` in the `IAS_ROOT/ias/bin` directory.

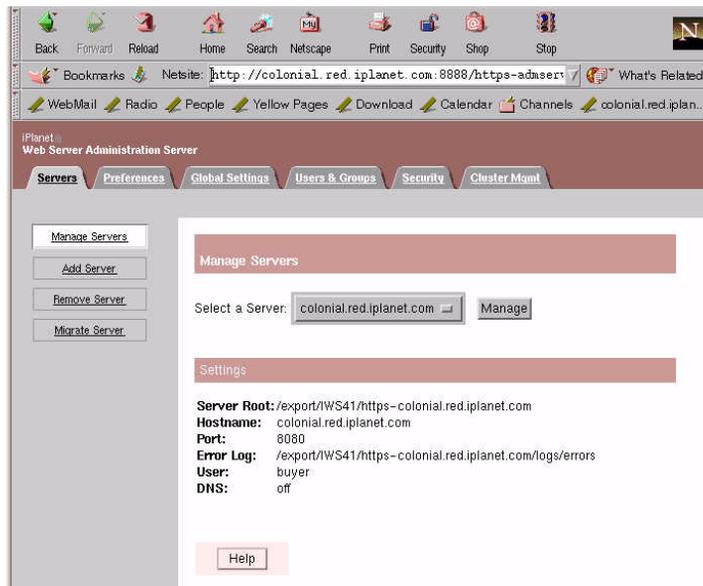
Reloading Configuration Files

iWS needs to be stopped and started to reload configuration files that were loaded during iAS installation.

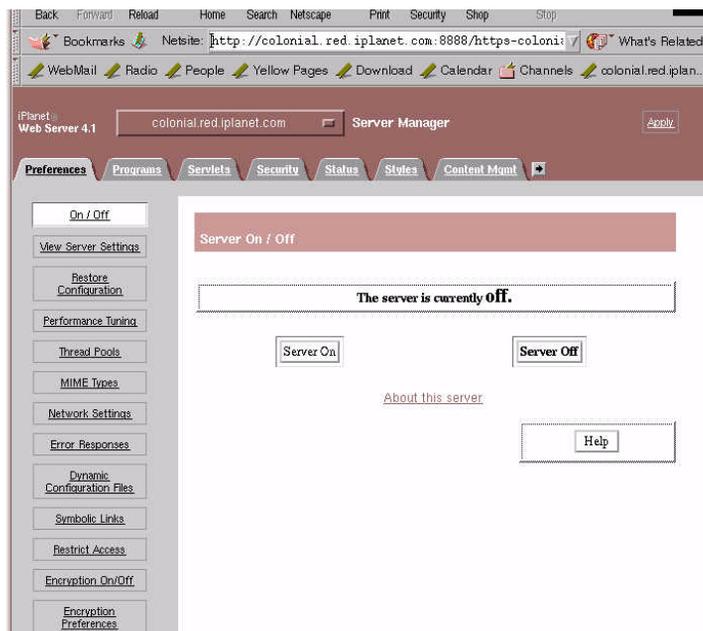
1. Run `startconsole` from `IWS_ROOT`.
2. The browser is launched and the login screen displays. Enter the username and password you created in Step 11.



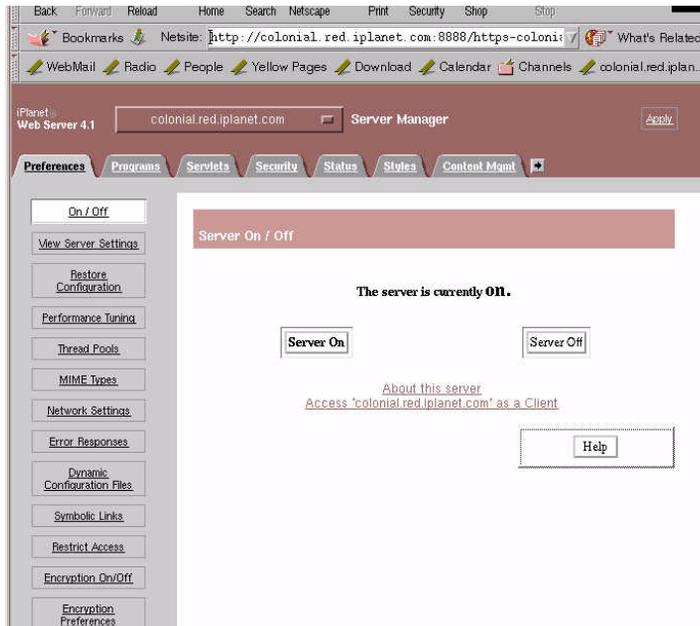
3. The Manage Server screen displays. Click the server name (located next to Select a Server) and then click Manage.



4. The Server On/Off screen displays with this message: Click Server Off.



5. A message displays **Warning: manual edits not loaded**. Apply the changes by clicking **Load Configuring Files**.
6. The **Server On/Off** screen displays with this message: **The server is currently on**.



Checking iAS Installation

1. After completing the iAS installation, you can check to see if iAS is installed properly by executing a sample fortune program:

```
http://hostname:port/GXApp
```

For example,

```
http://colonial:8080/GXApp
```

2. Click **Access New iAS Sample Application**.
3. Under **Sample Application**, click **Fortune**.
4. From the **Fortune** page, you can check your fortune and verify that iAS is installed properly.

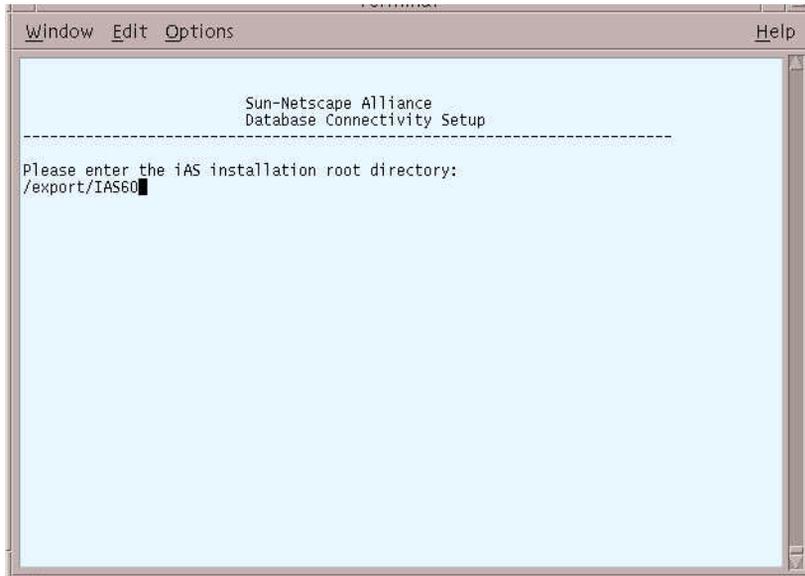
Enabling the Database with iAS

1. Set up the database session script:

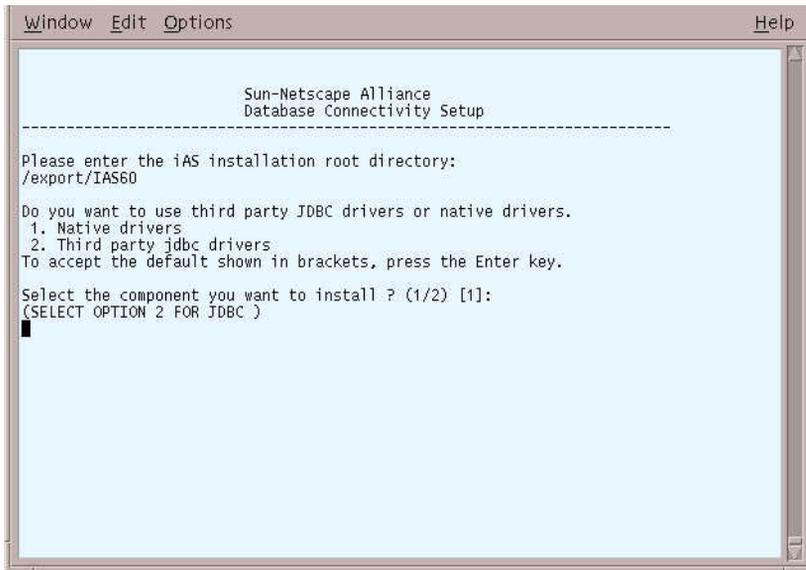
```
% cd IAS_HOME/ias/bin
```

```
% ./db_setup.sh
```

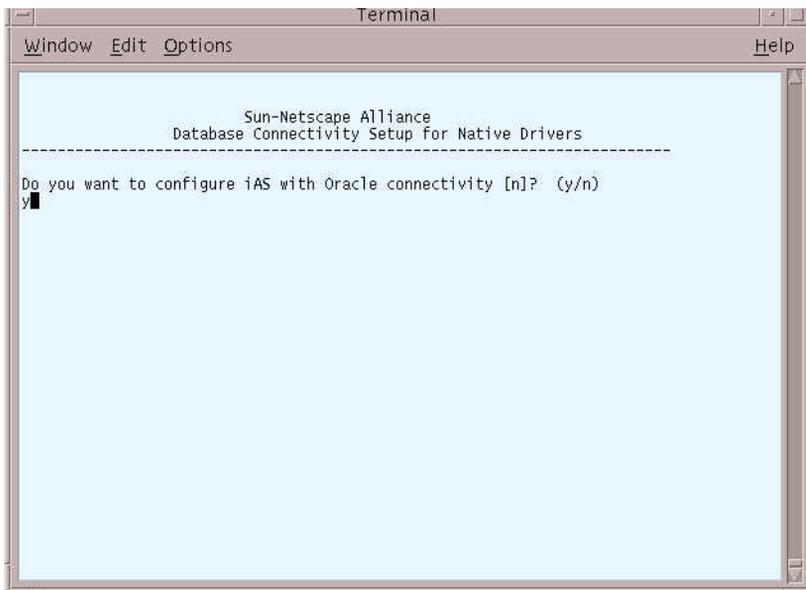
2. The Database Connectivity Setup prompt displays. Enter the location where iAS is installed (shown as /export/IAS60 in the example).



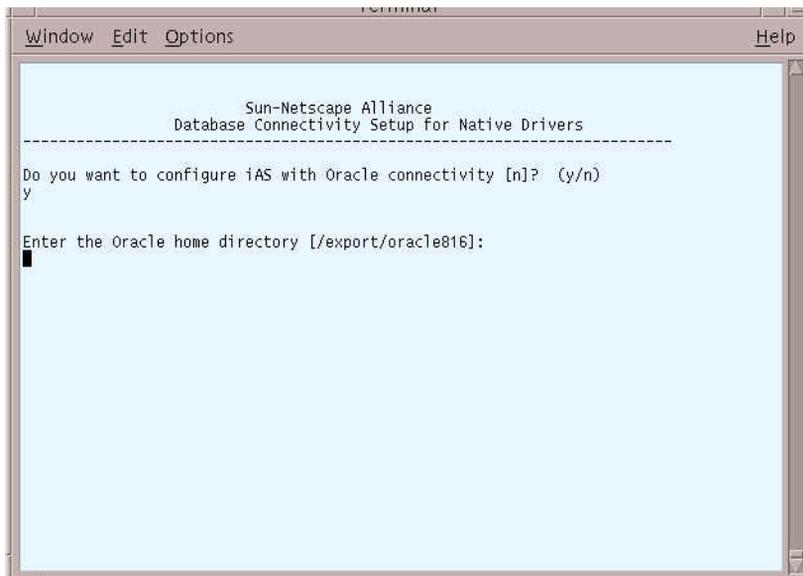
3. The Driver Installation screen displays. Press Enter to continue.



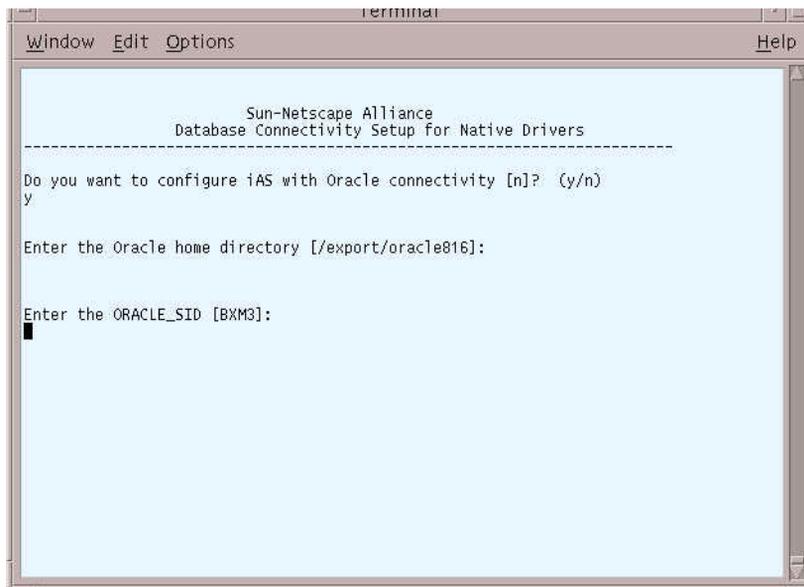
4. The Configuring with Oracle prompt displays. Type **y** to configure iAS with Oracle.



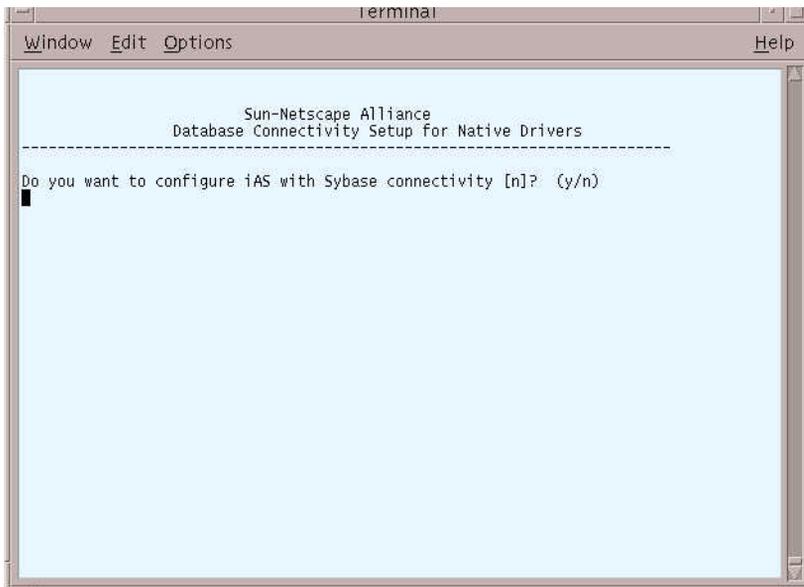
5. The Oracle prompt displays. Enter your Oracle home directory.



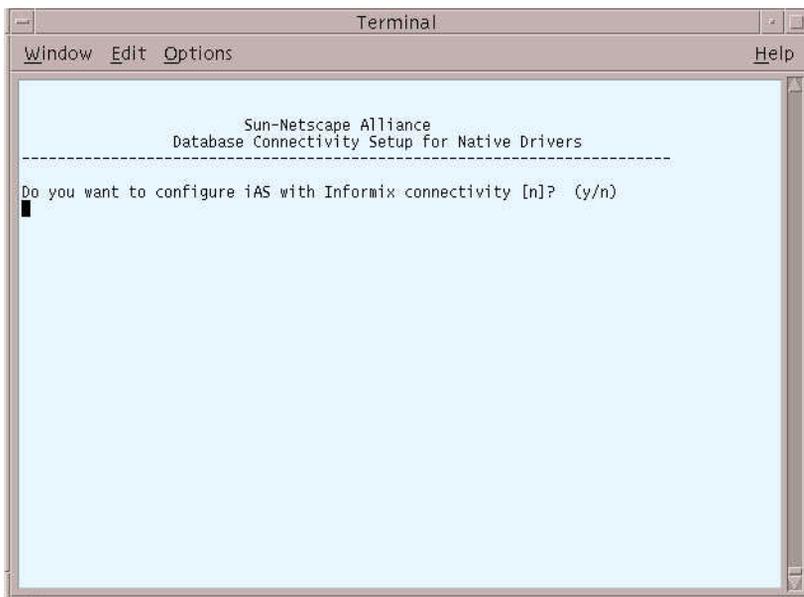
6. The next Oracle prompt displays. Enter your Oracle SID that you wish to connect to.



7. The Sybase prompt displays. Press Enter to continue.



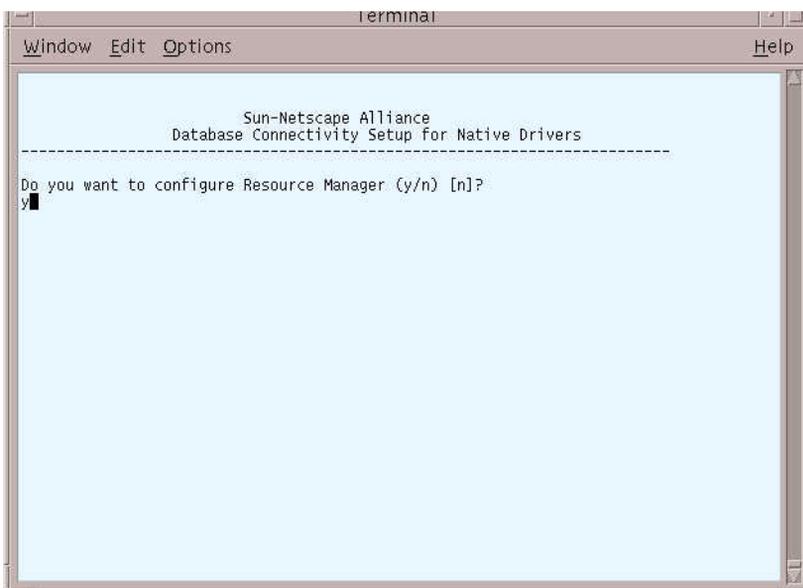
8. The Informix prompt displays. Press Enter to continue.



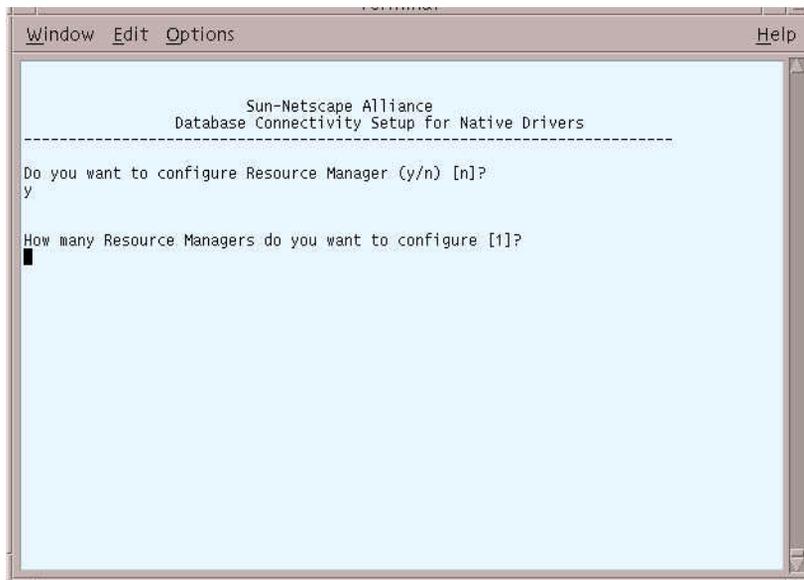
9. The db2 prompt displays. Press Enter to continue.



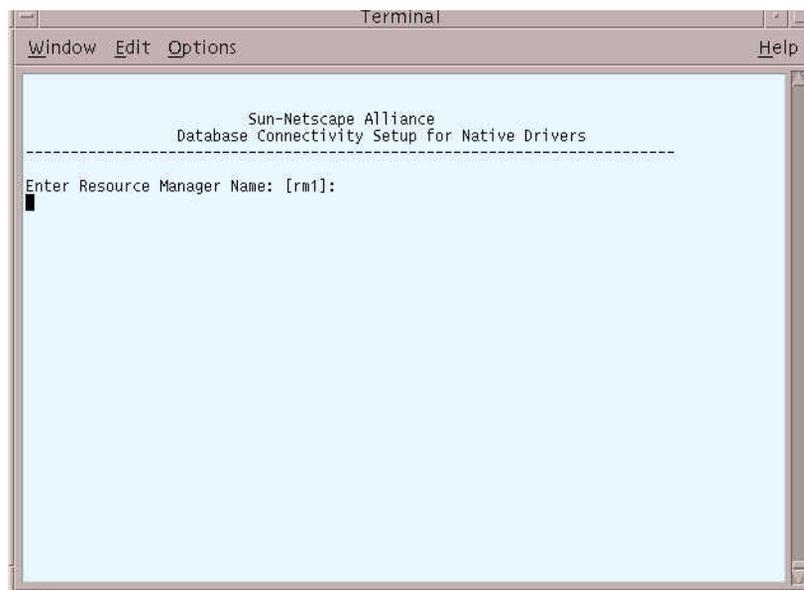
10. The next prompt displays. Type `y` to configure the Resource Manager.



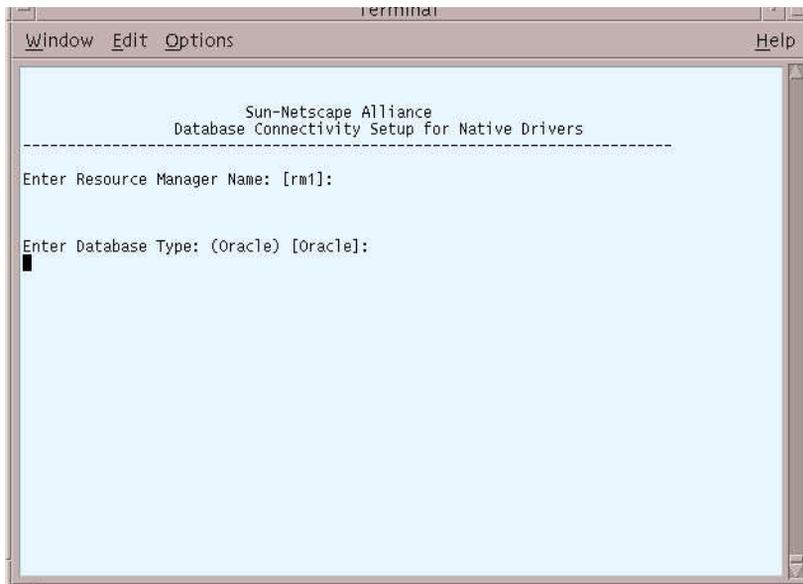
11. The next prompt displays. Press Enter to accept the default.



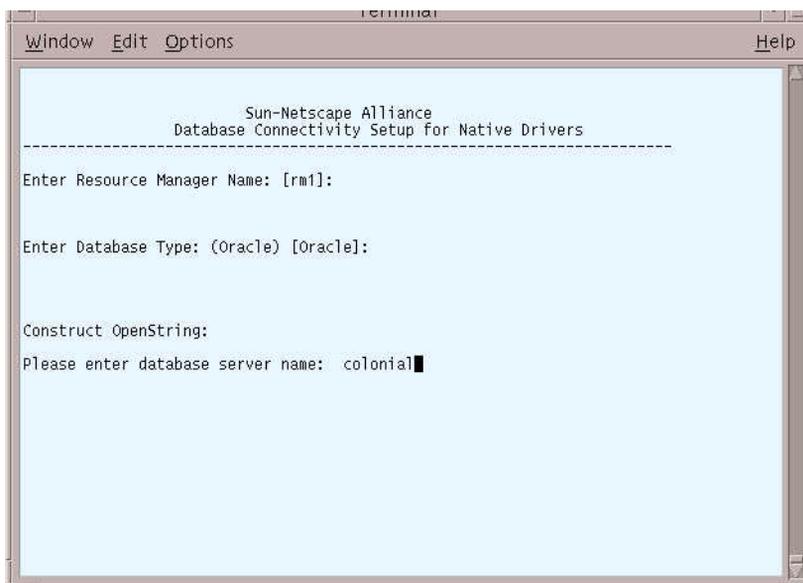
12. The next prompt displays. Press Enter to accept the default.



13. The next prompt displays. Press Enter to accept the default.

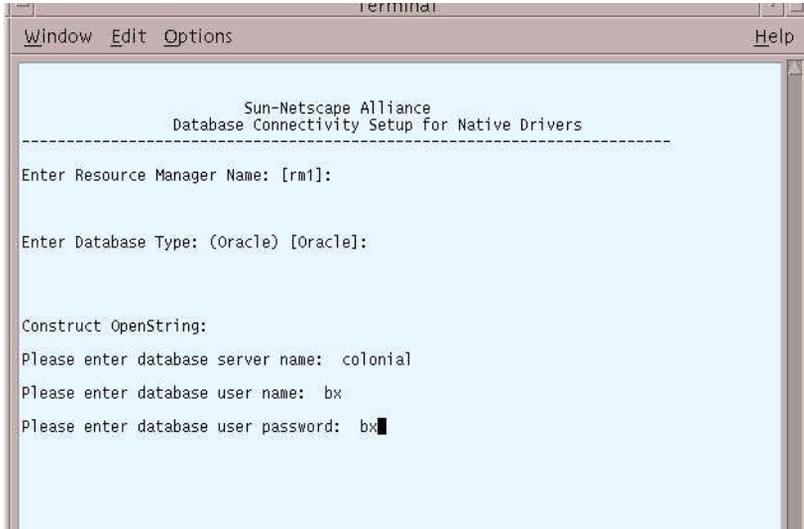


14. The next prompt displays. Enter the database server name (the machine where Oracle is installed).

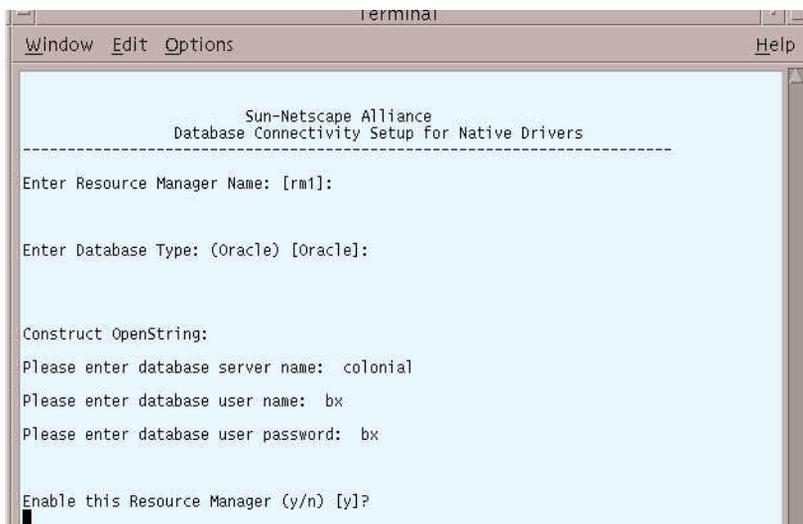


15. The next prompt displays. Enter the database user name and password.

NOTE During BuyerXpert installation, you will need to specify this Oracle user name and password. The BuyerXpert installer will create this user in Oracle.



16. The next prompt displays. Press Enter to enable the Resource Manager.

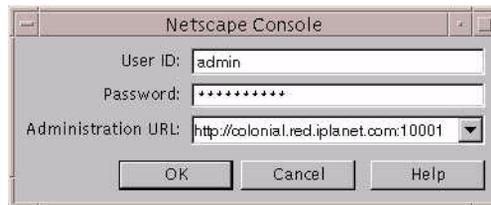


Creating an iPlanet Directory Server (LDAP) Instance

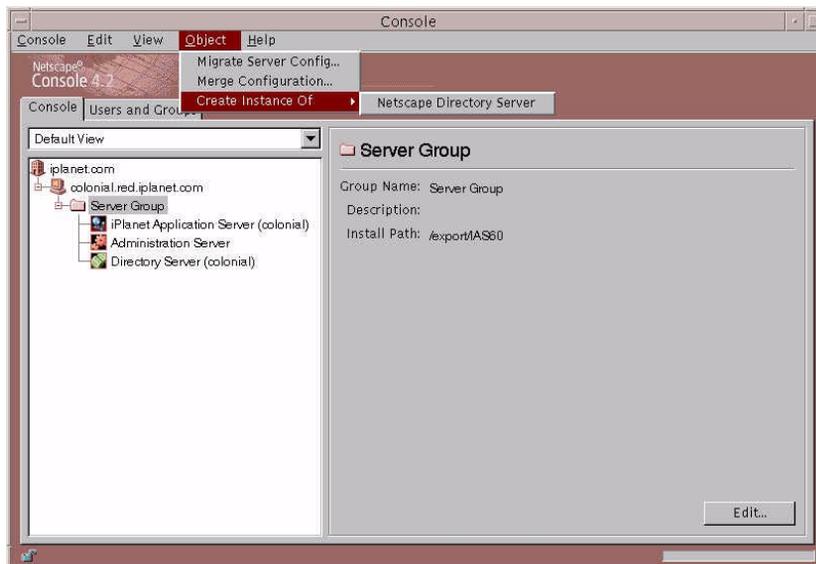
1. Start console using this command:

```
% IAS-ROOT/startConsole
```

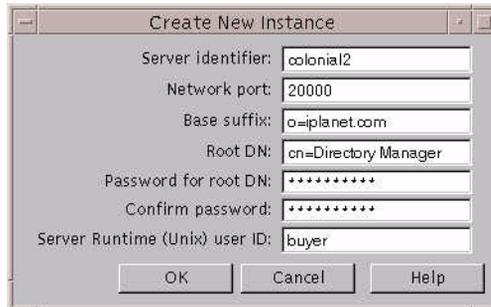
2. When this screen displays, enter your password and click OK. This is the password you specified in Step 19 of the iAS installation.



3. Choose the Server Group, located on the left side of the screen. Click Object, then from the drop-down menu, choose Create Instance of Netscape Directory Server.



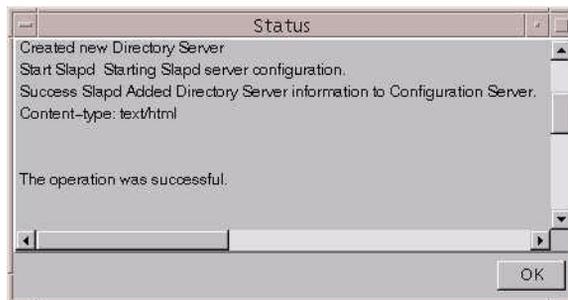
4. The Create New Instance window displays.



5. In the network port number field, type 20000 or your specific port number.
6. Create a password and then re-enter it again to confirm.

NOTE The network port number and root DN password will be required entries when installing SellerXpert.

7. Click OK. The following screen displays. Click OK.



8. Exit from the iAS administrative server.

Configuring the Process Manager

You should have already run the `db_setup.sh` script for iAS. You will first create another user in `ORACLE_SID` in addition to the one that you created to store BuyerXpert data.

Creating Another Oracle User

To create another Oracle user:

```
% sqlplus system/manager@oracle_SID
SQL>create user pm identified by pm
SQL>default tablespace TS01 temporary tablespace temp
SQL>quota unlimited on TS01
SQL>quota 0 on system;
SQL>grant connect, resource to pm
```

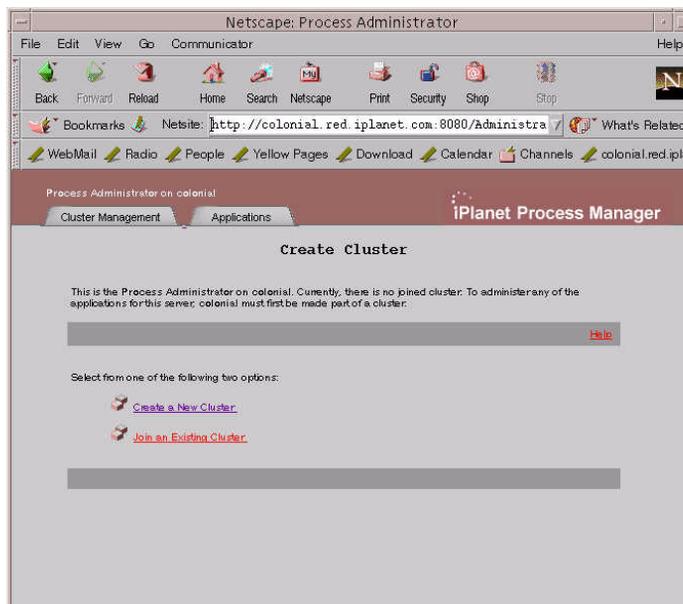
To configure the Process Manager:

1. Enter the URL:

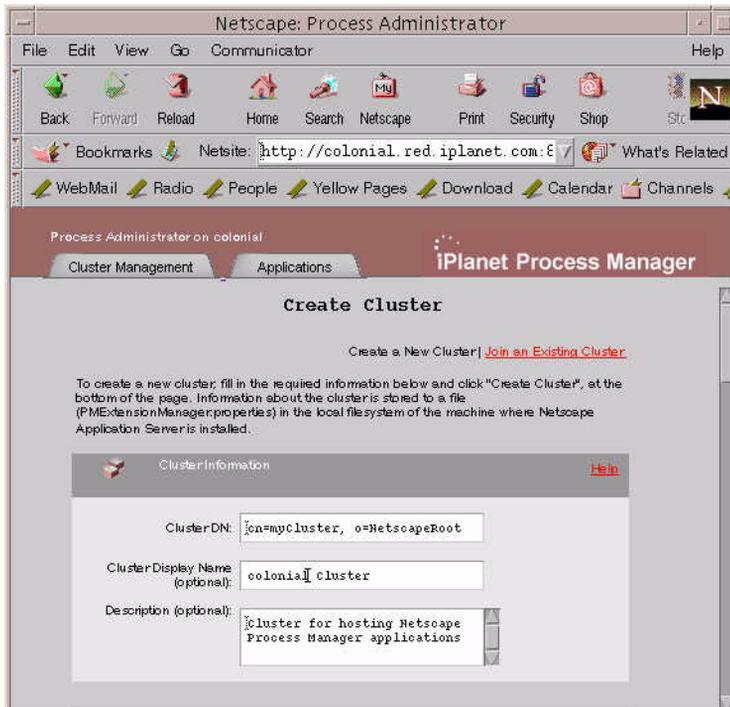
`http://machine-name.domain-name:iWS-port-number/Administrator.apm`

2. Enter your iAS user ID and password.

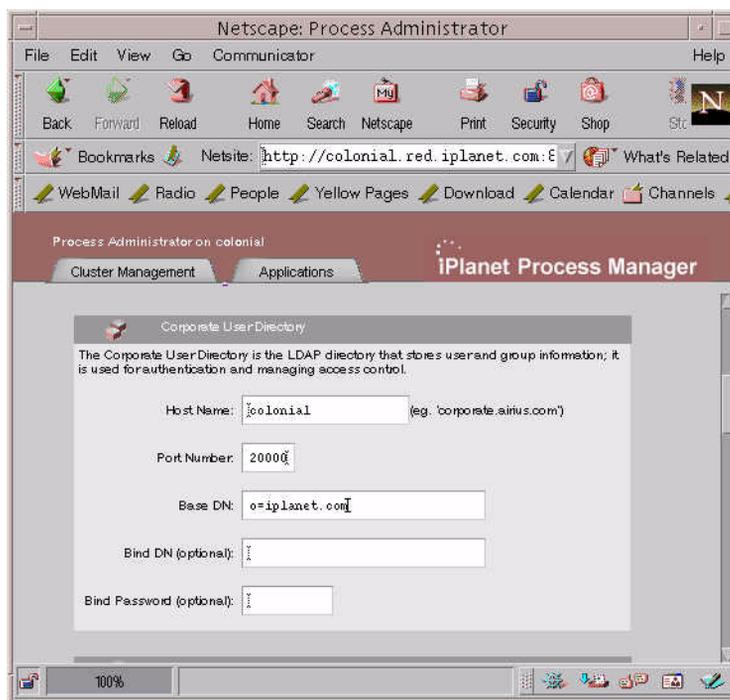
3. Select create new cluster and the Cluster Information screen displays.



4. In the Cluster Name field, type the name of your choice.

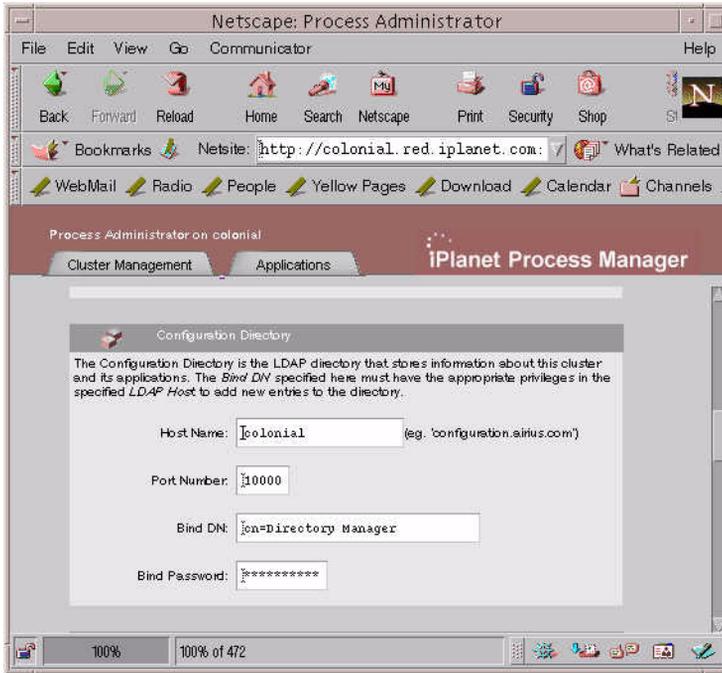


5. Scroll down to the Corporate User Directory Information part of the screen.



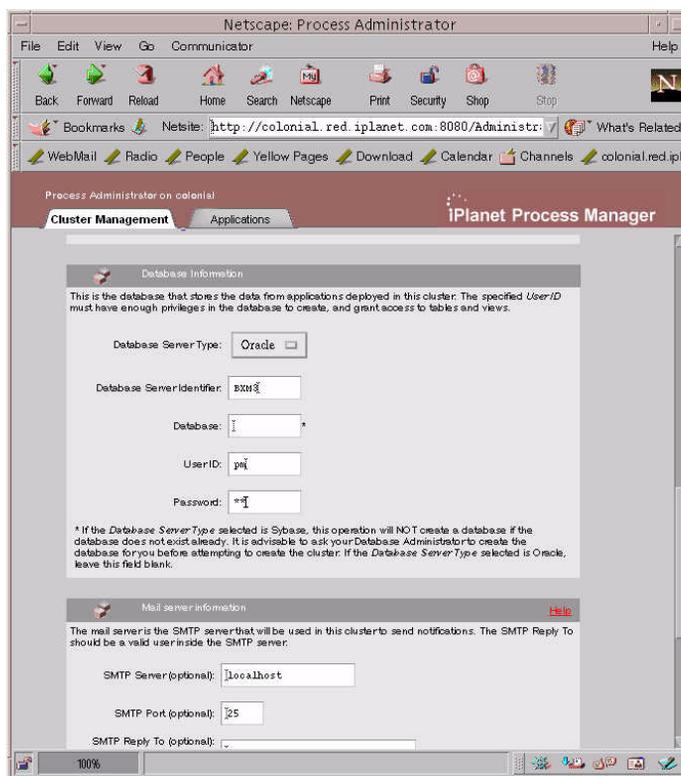
6. In the Host Name field, type your host name.
7. In the Port field, type 2000. This is the network port number that you created in Chapter 3, Section Creating an iPlanet Directory Server (LDAP) Instance, Step 5.
8. In the User Directory Base DN field, specify the DN for the root directory. For example, enter o=iplanet.com if your BuyerXpert configuration setting directory root DN is set to o=iplanet.com.
9. Scroll down to the Configuration Directory Information.

10. Enter the iAS directory server network port.



11. Type the bind password (your iAS password).

12. Scroll down to display the Database Screen.



13. Select DB Server Type, then select Oracle.

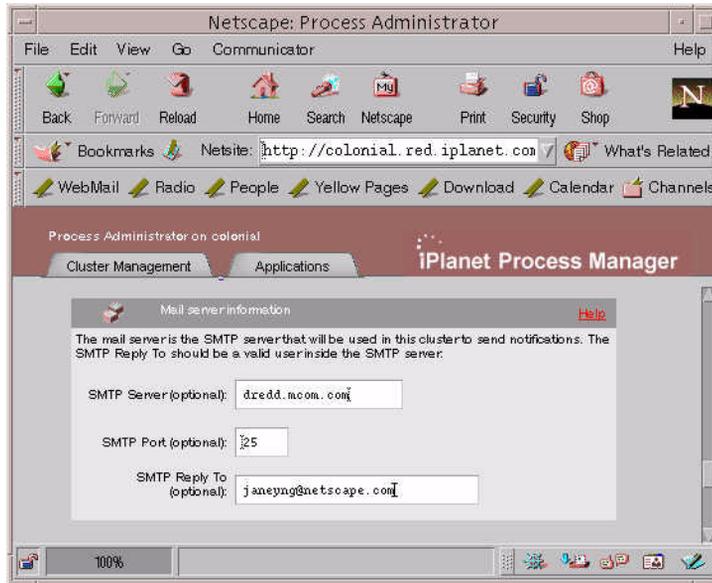
14. In the DB Server Identifier field, type your Oracle SID.

NOTE The Database field (displayed with a *) should be kept blank.

15. Type the Oracle database user ID and the password that was created earlier.

NOTE This database user account is fixed for the life of the installation. Specific application and configuration tables are stored here, so do not give it the same location as where you store BuyerXpert data.

16. The Mail Server Information screen displays.

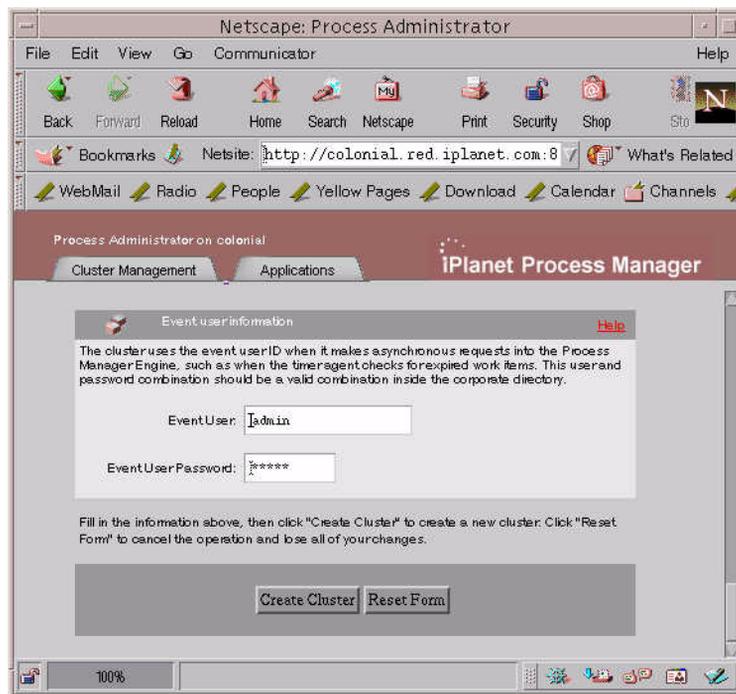


17. Type your SMTP e-mail server name.

18. Type your SMTP port number.

19. Type your SMTP reply to e-mail address (optional).

20. The Event User Information screen displays.



21. Create a new cluster user name and password.

22. Click Create Cluster.

23. After the cluster has been created, from any text editor, copy the lines that start with # Begin Cut ----- to the end (End Cut -----).

24. Open the *iAS installation dir/builder/preferences.ini* file.

25. Find this line in that file:

```
# add your lines below here:
```

26. Add the lines copied in Step 23 to just below this line.

27. Verify that your file looks like the following:

A terminal window titled "Terminal" with a menu bar containing "Window", "Edit", "Options", and "Help". The terminal content is as follows:

```
#
# Add your lines below here:
#
# Begin Cut -----
cluster = ldap://cn=Directory Manager:CRYPT{Wzo/NjI10j82MjU=3@colonial:1000
0/cn=myCluster, o=NetscapeRoot
corp_dir = ldap://colonial:20000/o=iplanet.com
# End Cut -----
#
# -----
--
# showprefmenu = true
# showthreadid = true
# showextramenu = true
# sortAttribute = cn
# showLDAPEntryIndex = true
# -----
--
```

28. Save the file.

Installing BuyerXpert

This chapter describes the tasks needed to install BuyerXpert, which you should perform in the following order:

- Preparing to Unload the Distribution Media
- Verifying the Database and Server Installations
- Installing BuyerXpert Software
- Running the Process Builder
- Importing Timecard Application

Preparing to Unload the Distribution Media

For some of the installation tasks, you will need to work in a temporary directory called a staging area. You extract the contents of the distribution media into this staging area. In the example installation, the staging area is a directory called stage, meaning you can name it anything you want, and that it is temporary. You must be logged in as the root user.

iPlanet recommends you install the BuyerXpert software behind the firewall.

NOTE You need approximately 700 MB of available disk space for the staging area.

Your BuyerXpert system package contains CD-ROMs for some of the third-party software. The BuyerXpert software is distributed on one CD-ROM.

BuyerXpert CD-ROM Contents

The following file is on the BuyerXpert CD or is included with the BuyerXpert distribution:

```
buyerxpert.tar.Z
```

Verifying the Database and Server Installations

Make sure you have the following software installed and running:

- Oracle Server Database 8.1.6 Standard or Enterprise Edition with InterMedia Text (this can be on a separate machine)
- Oracle Client (if Oracle Database is running on a different machine)
- iPlanet Web Server (iWS) 4.1, SP5
- iPlanet Application Server (iAS) 6.0, SP2:

```
IAS/bin/KIVaes.sh start
```

Information About Sample Data

During the installation of BuyerXpert, an option to load sample data is available. This sample data is designed to demonstrate various features of BuyerXpert. The sample data includes entries for the Directory Server (LDAP) data storage, as well as the RDBMS data storage. If you choose to include sample data in your installation, the data storage specified will be populated with the sample entries.

After you are satisfied with the installation, you will want to change the BuyerXpert configuration to point to data storage other than those configured during the sample data installation. These procedures are located in the section, Preparing the Seed Data Storage, located in this chapter. You can now reconfigure the installation to point to this data storage. Also, you can choose to refresh the data storage by cleaning and preparing it with the seed data as described in the previously mentioned section (Preparing the Seed Data Storage).

Sample Data in Directory Server

The sample data in the Directory Server is rooted with a well-known suffix `o=iplanet.com`. This allows you to use the same Directory Server instance (`host:port`) for the real data and at the same time keep the sample data separate and away from interfering the real data. When using the real data, you can continue to use the same Directory Server instance and configure BuyerXpert to look at a suffix other than `o=iplanet.com` as the search root. To use the sample data, you will have to configure BuyerXpert to use `o=iplanet.com` as the search root. It is not required to create the `o=iplanet.com` suffix during installation of the Directory Server. Loading of sample data will automatically create it.

Sample Data in Oracle

The sample data in Oracle will be loaded into the user tables for the specified Oracle database user. When using real data, it is advised to use a different Oracle database SID. This will prevent any conflicts with or overwriting or loss of the sample data.

Switching between using the sample data and real data (and vice versa) will require you to only reconfigure the BuyerXpert installation. For instructions on how to reconfigure, please refer to the *BuyerXpert Deployment Guide*.

Installing BuyerXpert Software

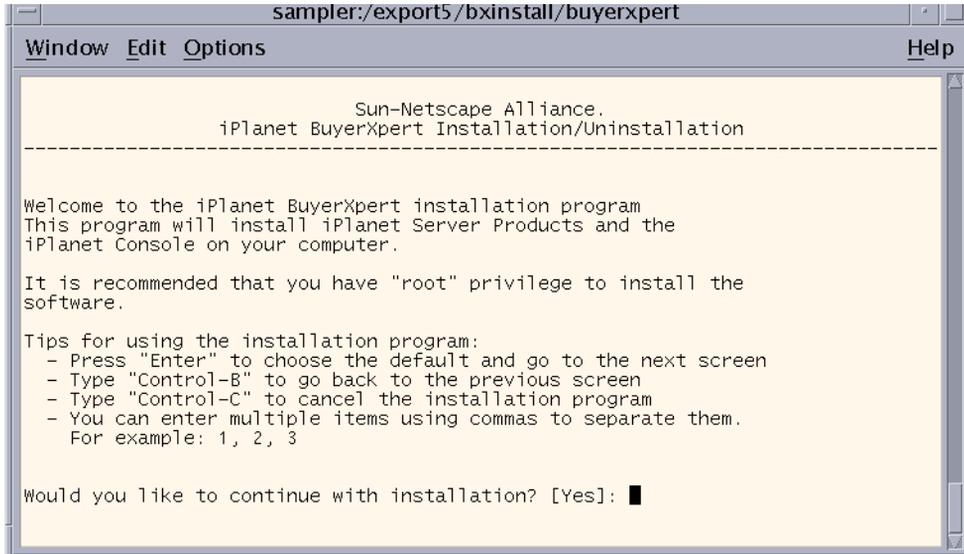
NOTE When you install BuyerXpert, you must use the same Unix user and group that you used to install iAS.

To install the SellerXpert software from the CD:

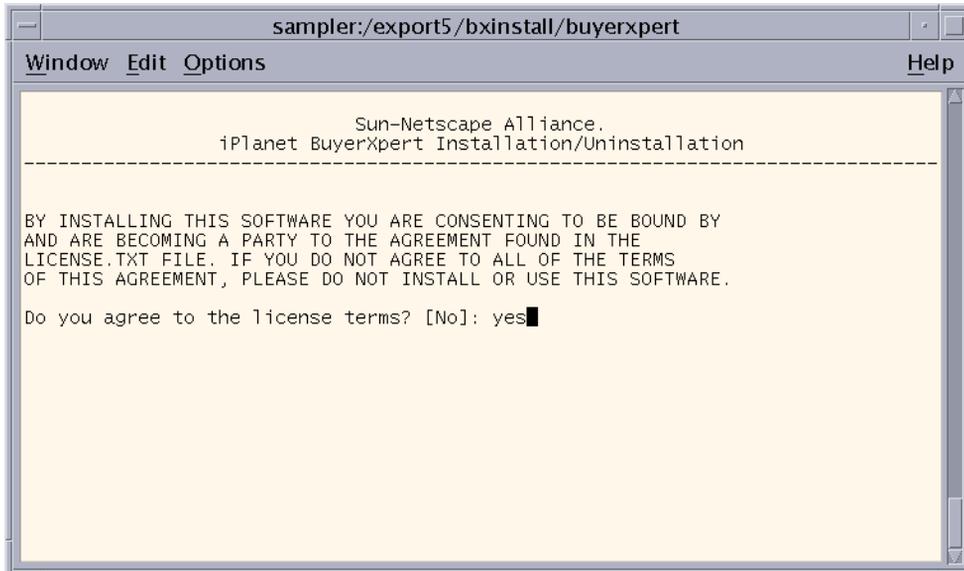
1. Change to the SellerXpert directory and run the setup script:

```
% zcat buyerxpert.tar.Z|tar xvf -
% cd buyerxpert
% ./setup
```

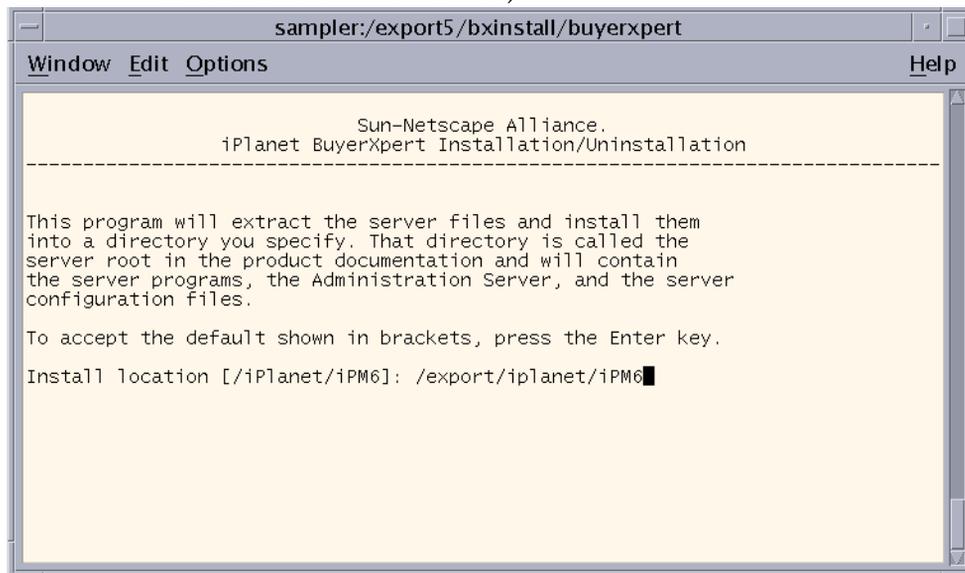
2. The Welcome screen displays. Read the instructions and press Enter to continue.



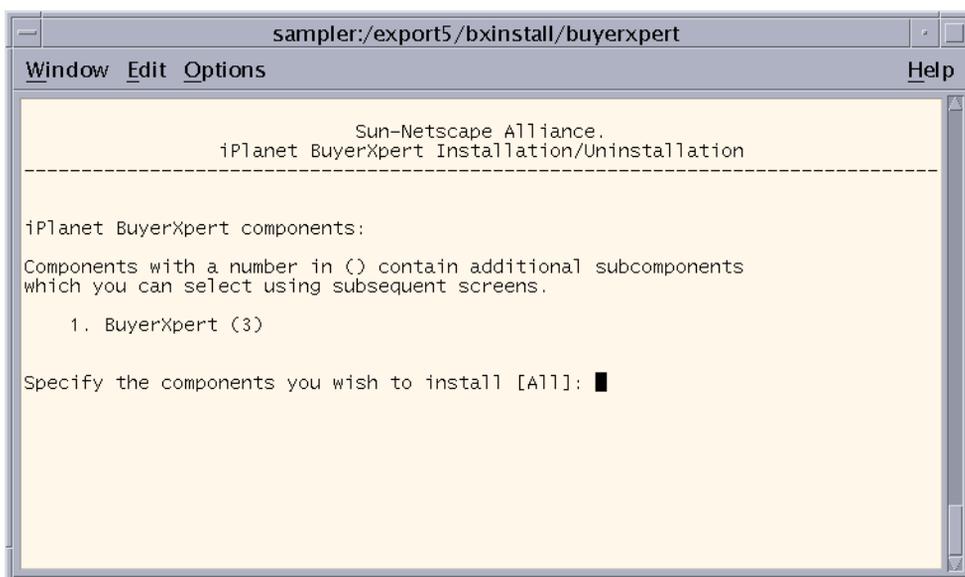
3. The Licensing Agreement screen displays. Read the instructions and type **yes**.



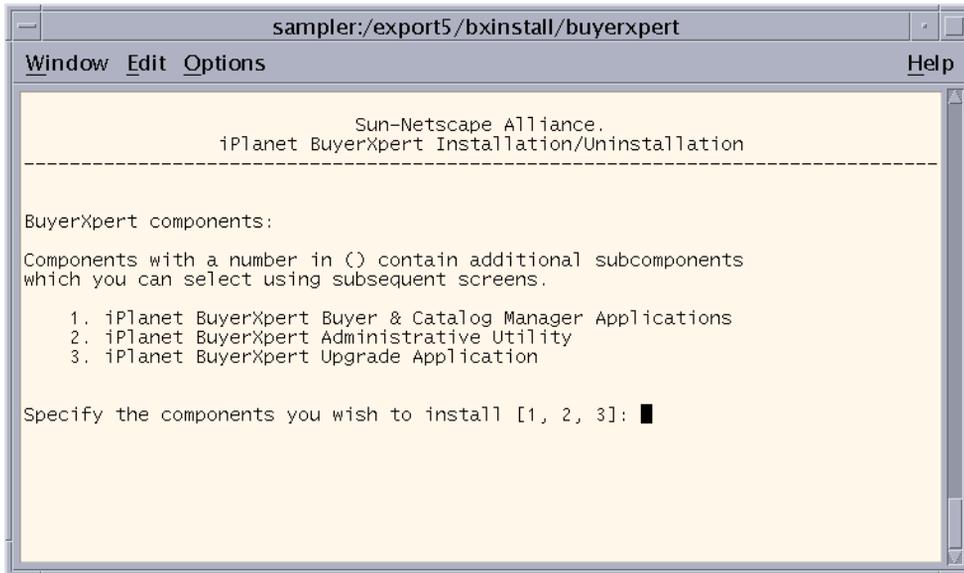
4. The Installation Location screen displays. Type `/export/IAS60` (this is the location where iAS is installed).



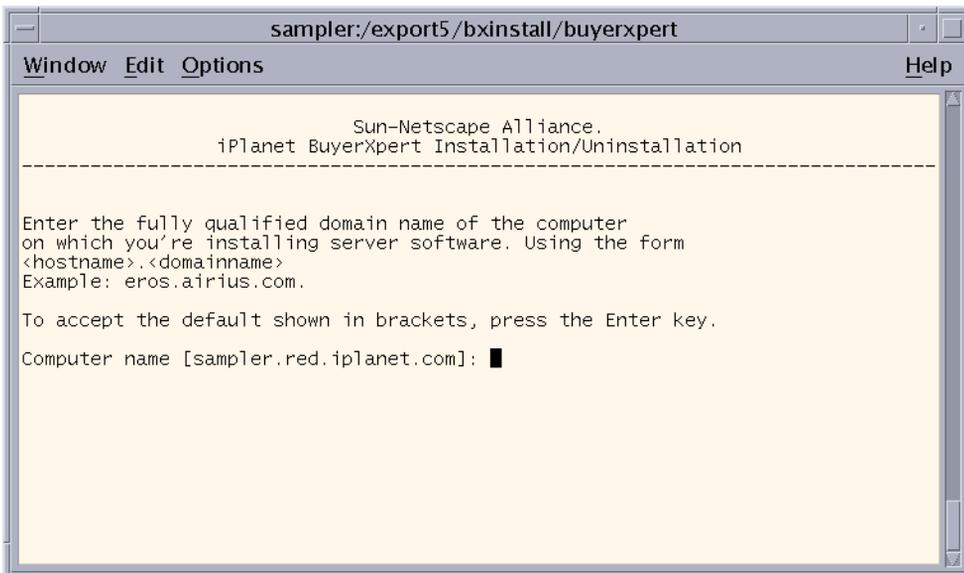
5. The BuyerXpert Component screen displays. Read the instructions and press Enter to continue.



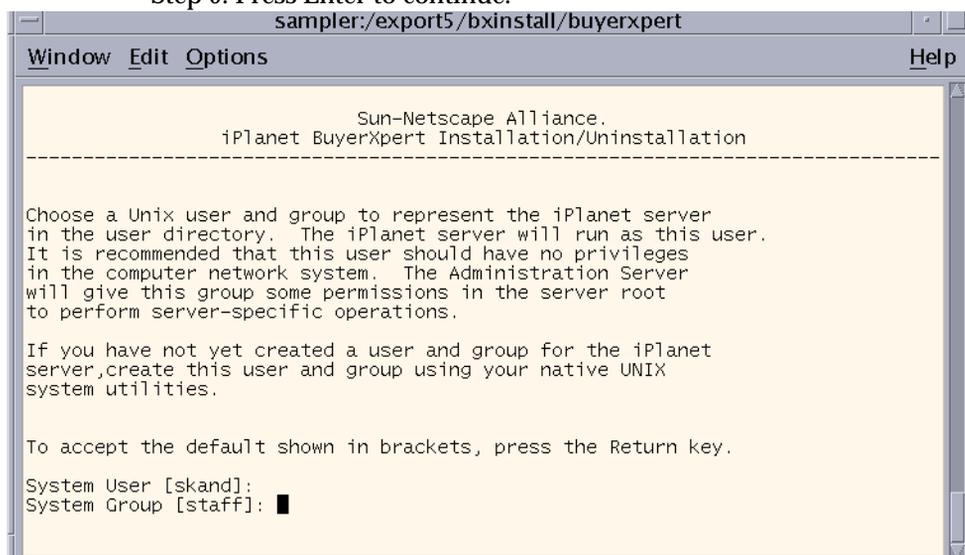
6. The Additional BuyerXpert Components screen displays. The default is all components listed are installed. If you wish to install different components on another machine, select the component(s) that you need and press Enter. It is recommended to install all the components first.



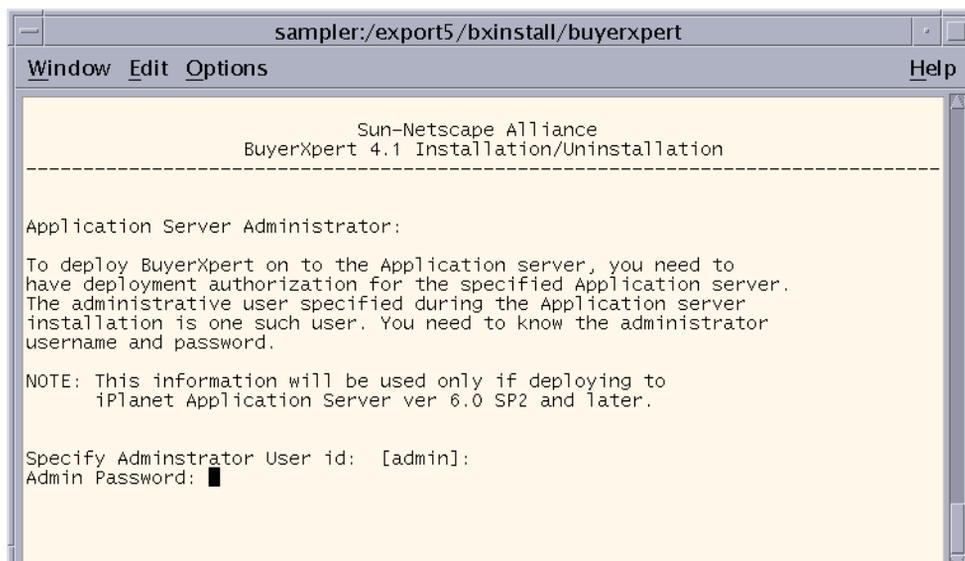
7. When the next screen displays, read the instructions and press Enter to continue.



8. The Choosing a Unix User and Group screen displays. This is the same Unix user and group you created in Chapter 3, Installing iPlanet Web Server (iWS), Step 9. Press Enter to continue.



9. At the Application Server Administrator screen, enter the administrator user ID and password that you created when you installed iAS (Chapter 3, Installing iPlanet Application Server (iAS), Step 28).



10. At the next screen, the default iAS administrative server port number is displayed as the default entry. Press Enter if the default port number is correct.

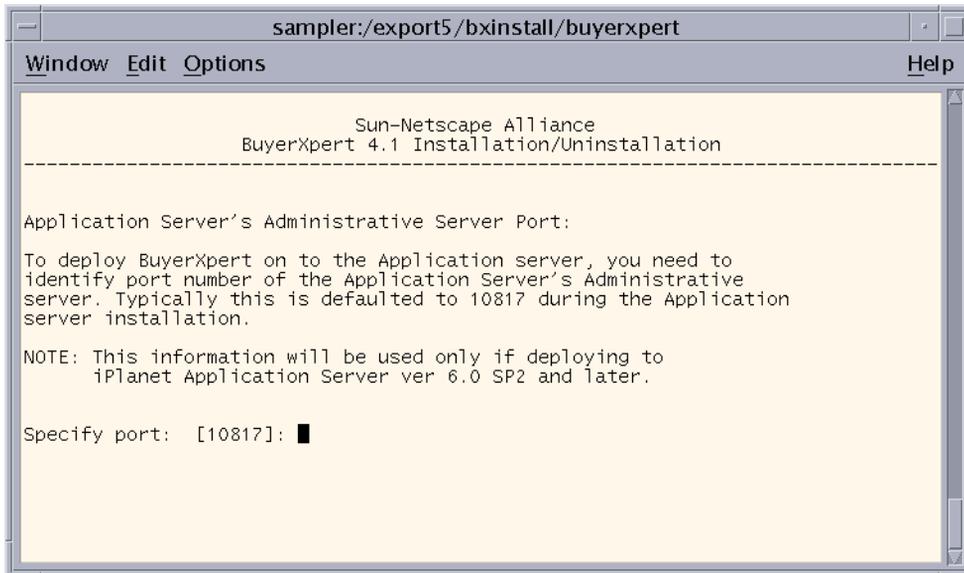
NOTE To check the port number, run:

```
% IAS-ROOT/ias/bin/kregedit
```

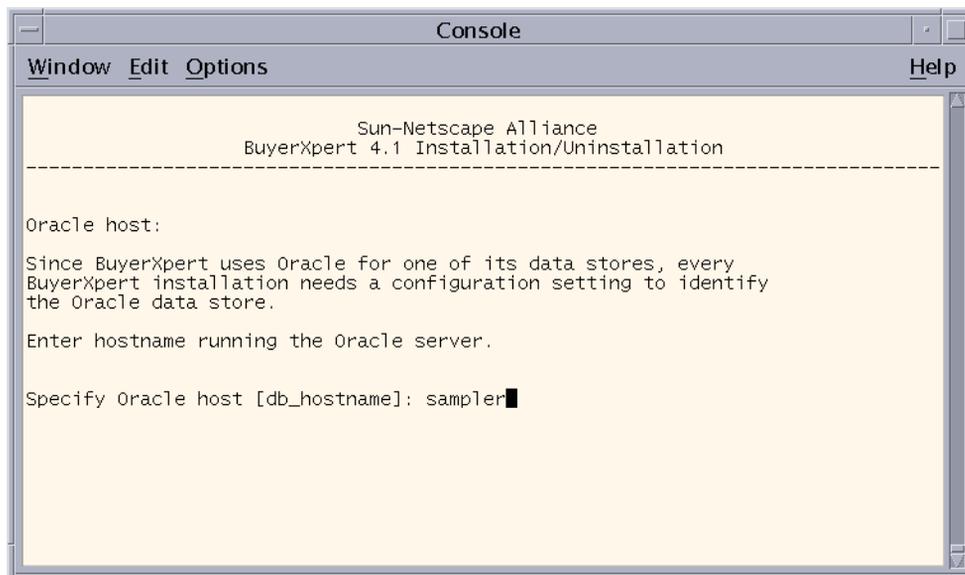
When the screen displays, expand the tree:

```
SOFTWARE>iPlanet>Application Server>6.0>Admin>Port
```

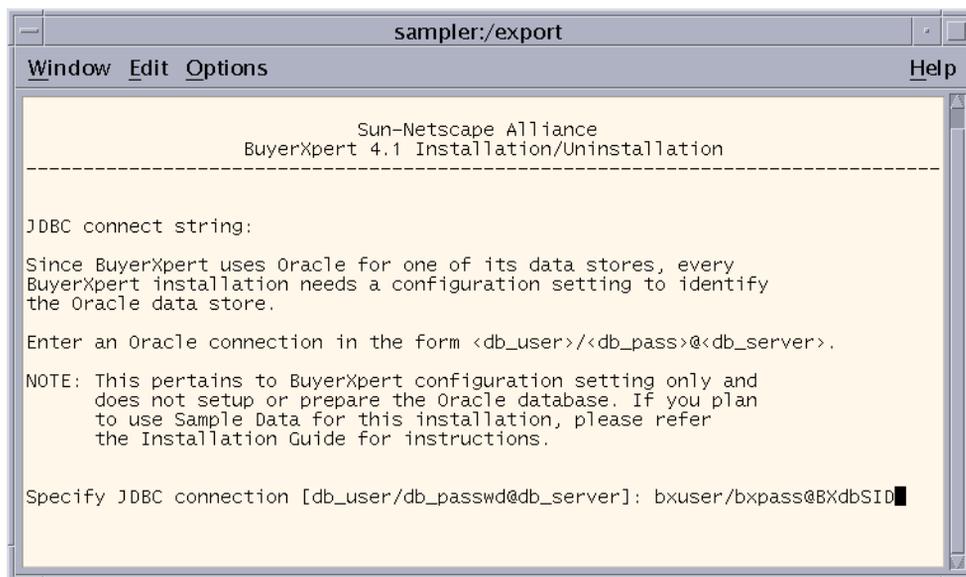
The default port number displays.



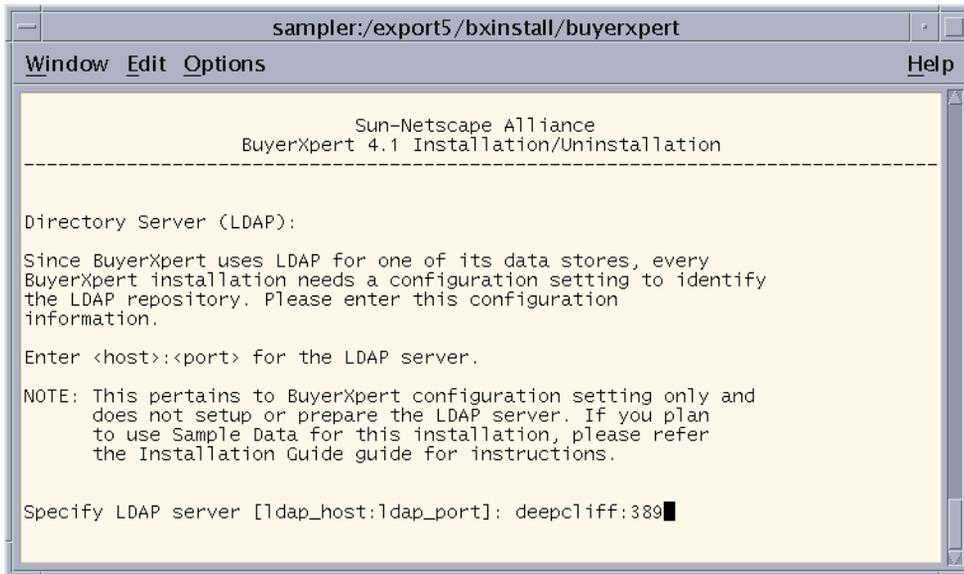
11. The Oracle Database Host screen displays. Enter the machine name where Oracle is installed.



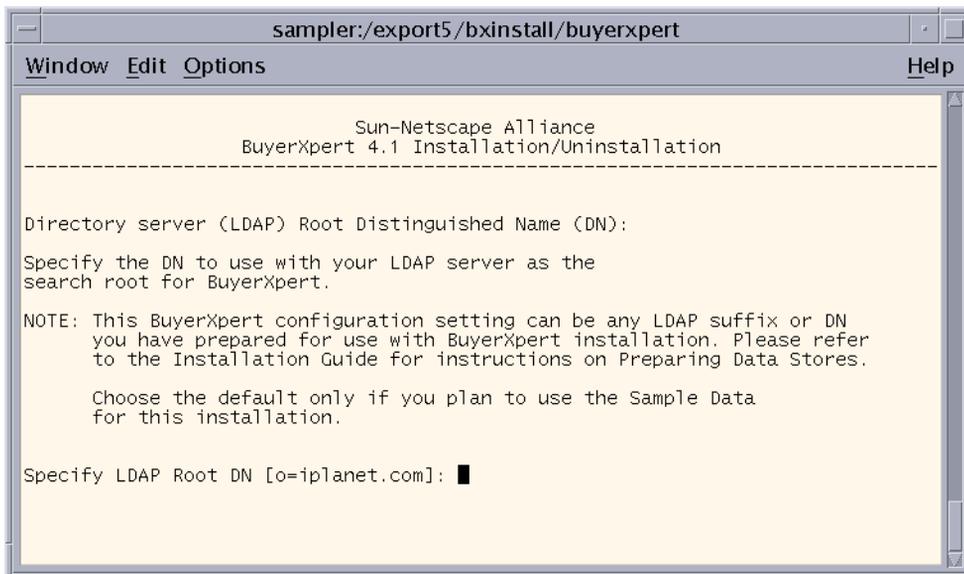
12. The Oracle Connection (JDBC) screen displays. The JDBC connection is the user name and password in the format *username/password@ORACLE_SID*. The installer will create this Oracle user.



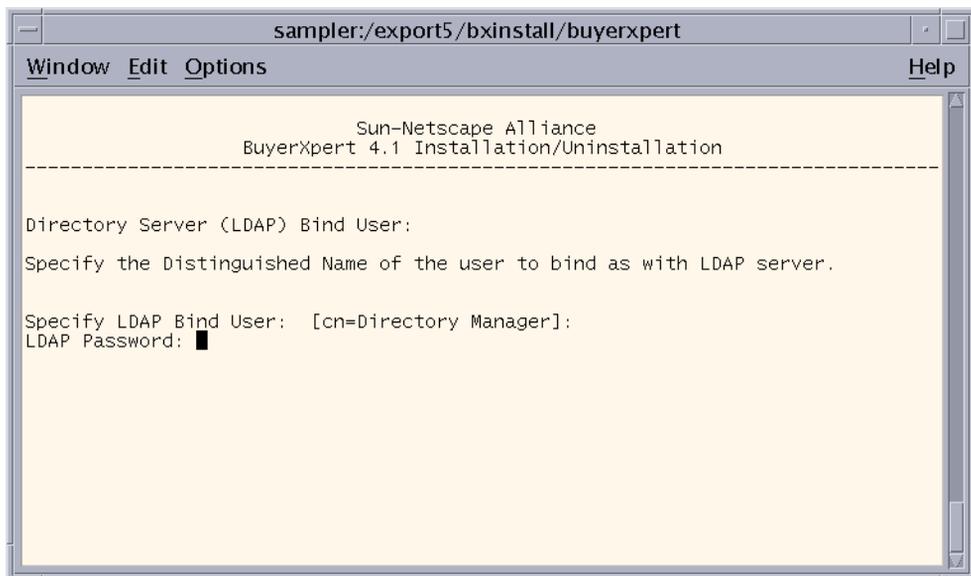
13. At the next screen, read the instructions and enter the Directory Server (LDAP) name.



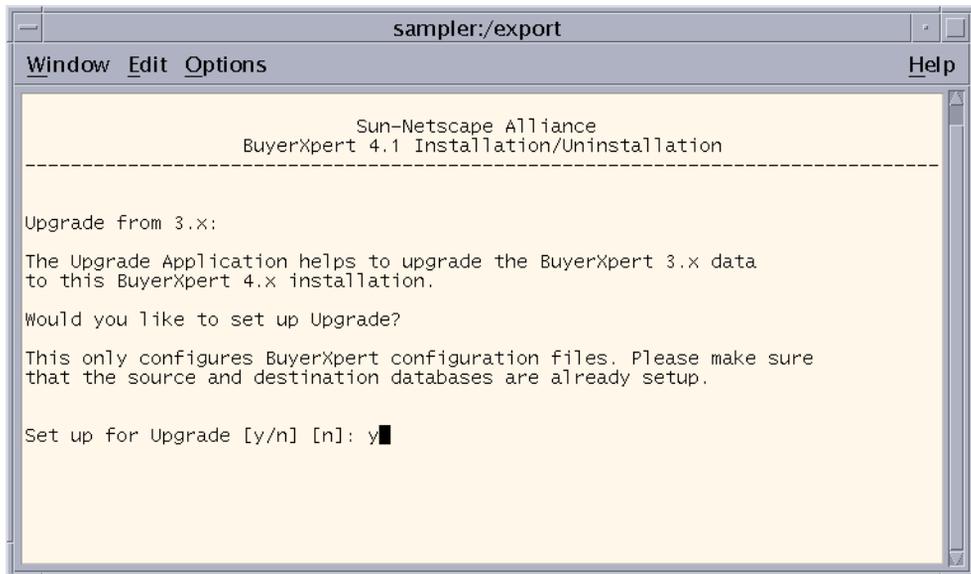
14. At the next screen, read the instructions and press Enter to continue.



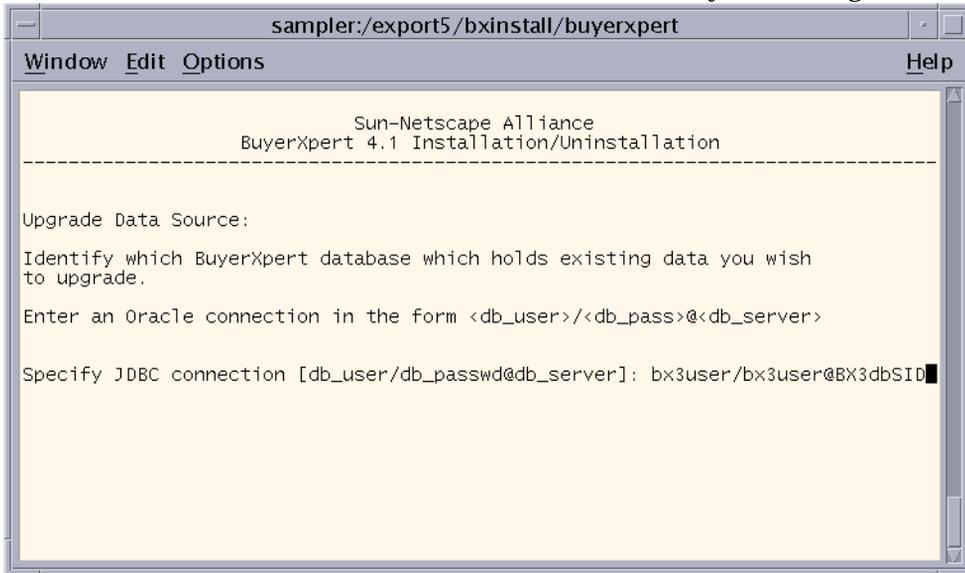
15. At this screen, enter the Directory Server user and password.



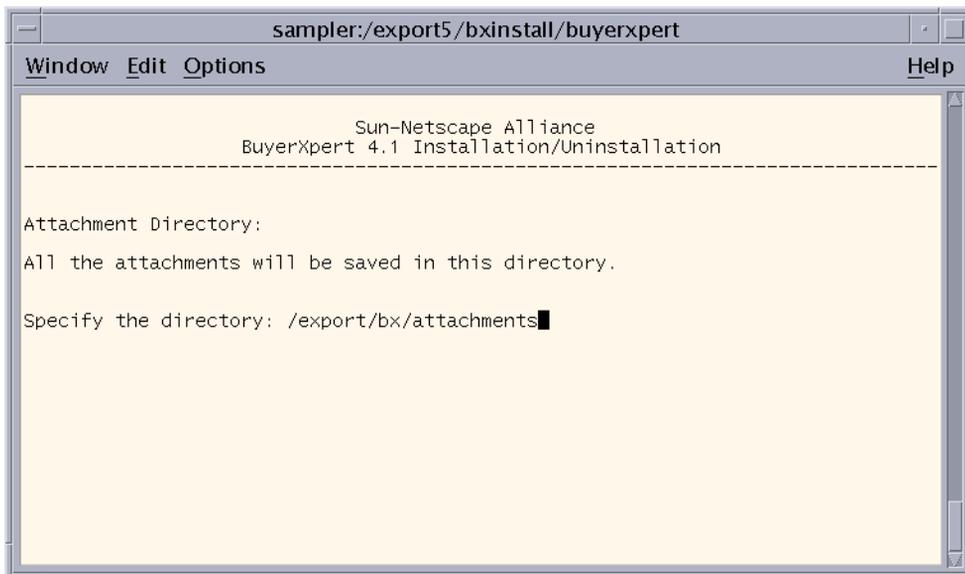
16. At the upgrade screen, type **y** to set up for the upgrade process.



17. At this screen, enter the JDBC connection where your existing data is stored



18. The Attachment Directory screen displays. Type `/tmp` if you want to save the attachments to the temp directory. Make sure there is a `/tmp` directory first; if not, create one.

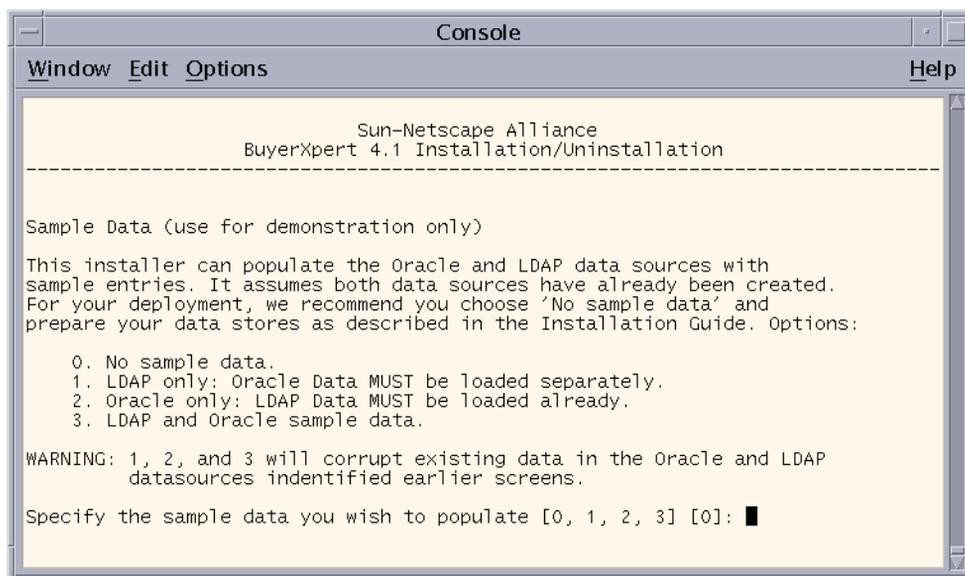


19. When the Sample Data screen displays, choose your option for installing sample data. Type 3 to include sample data.

NOTE For BuyerXpert to run properly, you do not have to have sample data installed (option 0) but you must have seed data. Installing the seed data instructions are provided in the section, Preparing the Seed Data Storage, located at the end of the chapter.

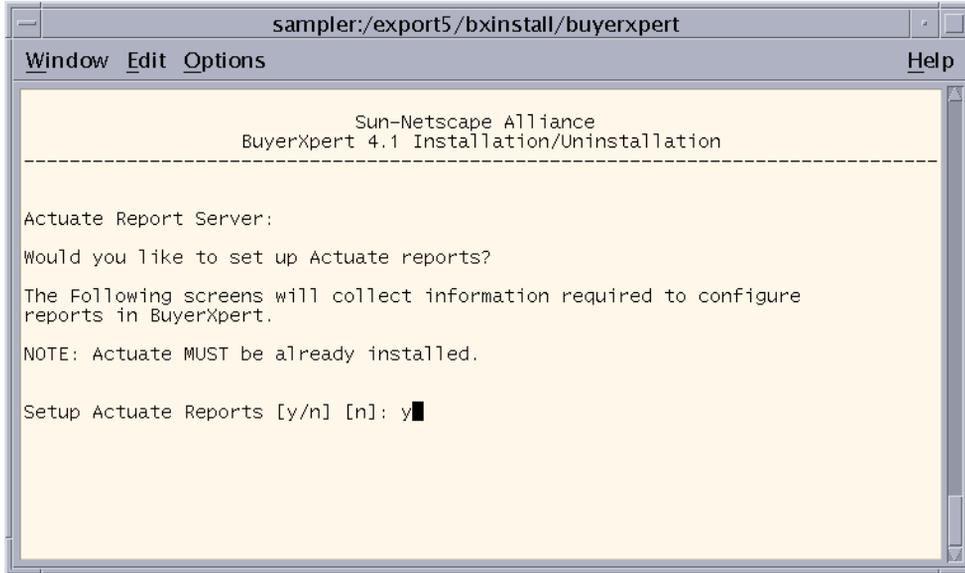
For information on sample data, refer to the section, Information About Sample Data, located at the beginning of this chapter.

NOTE The BuyerXpert installer assumes that the Oracle system user and password are SYSTEM/MANAGER. It also assumes that the data segment tablespace name is TS01 and the index segment tablespace name is TS02. If you prefer to use other system user and passwords or different data and index tablespace names, select option 0 or 1 and populate the database manually.



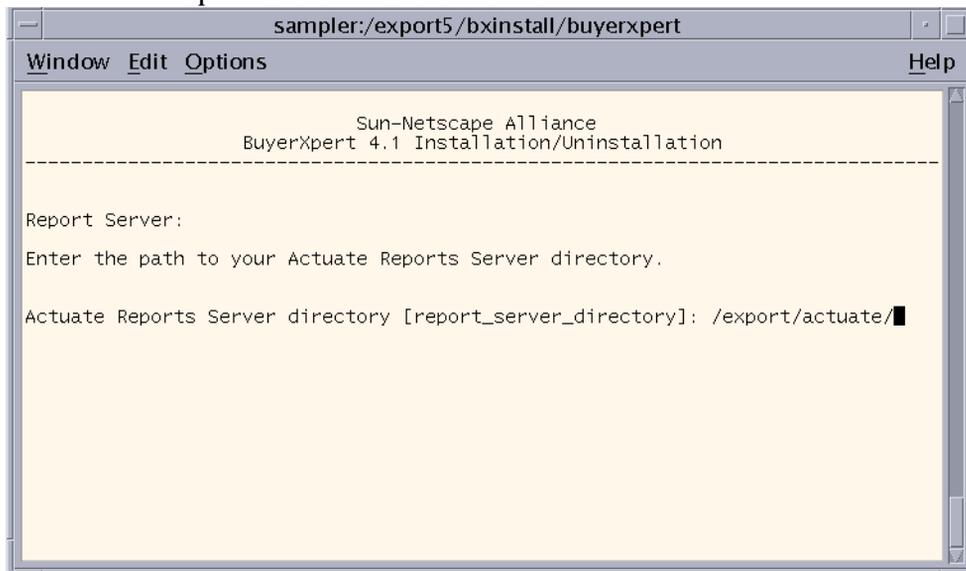
Configuring Actuate for BuyerXpert

20. The Setup Actuate Reports screen displays. Type **n** if you do not wish to configure Actuate with BuyerXpert at this time. Type **y** if you do and the next two screens will display.



NOTE You must have already installed Actuate prior to installing BuyerXpert.

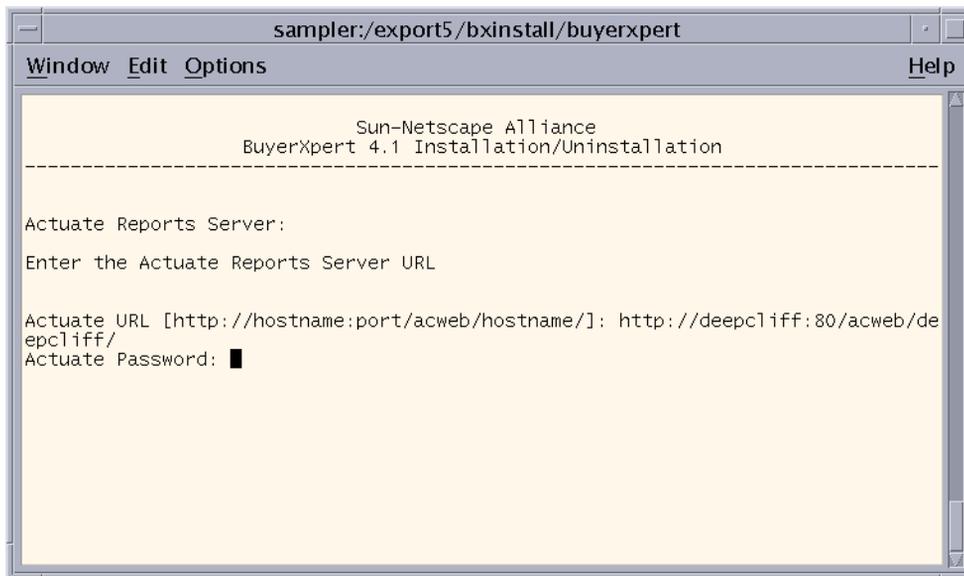
21. If you typed `x` in the previous screen, the Report Server screen displays. Enter the path where Actuate is installed.



22. At the next screen, enter the Actuate Server URL.



23. The Actuate Administrator Password screen displays. Enter the Actuate administrator password.



Allow approximately 30 minutes for BuyerXpert to complete the installation.

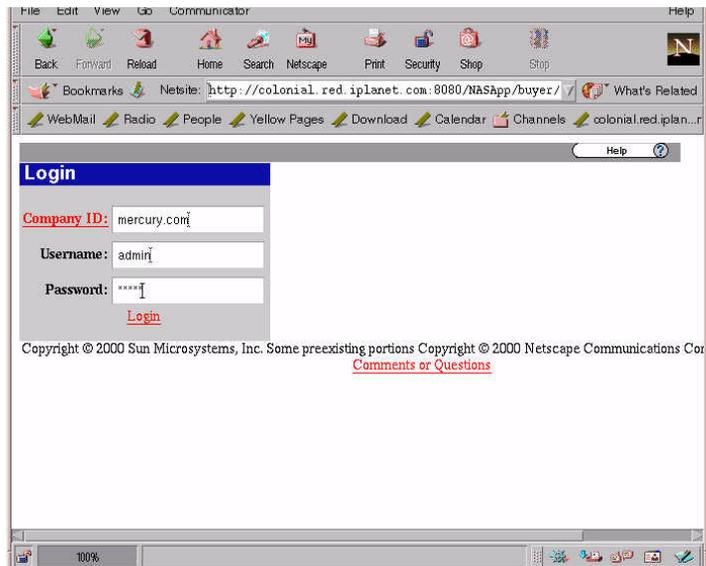
Creating Catalogs in Catalog Manager

To create catalogs in Catalog Manager:

1. Go to the URL:

`http://hostname:port/NASApp/buyer/imm/imm.jsp`

2. The log in screen displays.



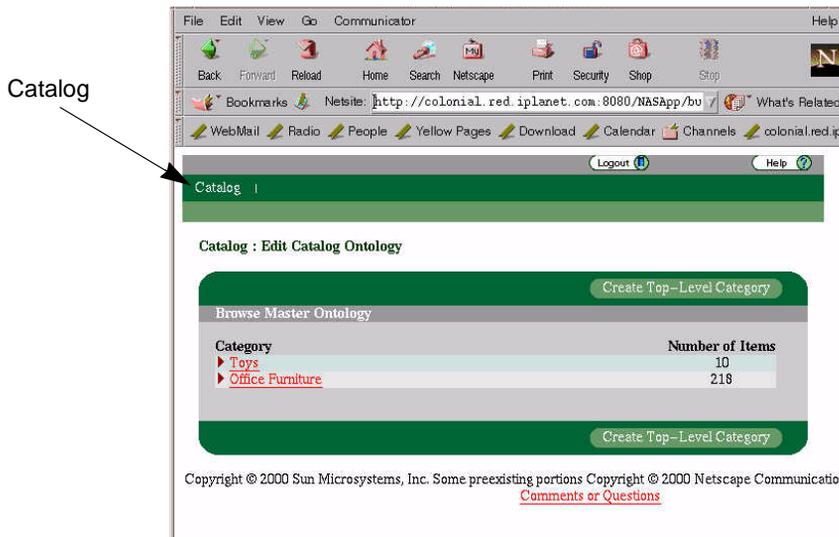
3. To enter the sample catalog data, type the following information in the fields shown:

Company ID: **mercury.com**

Username: **admin**

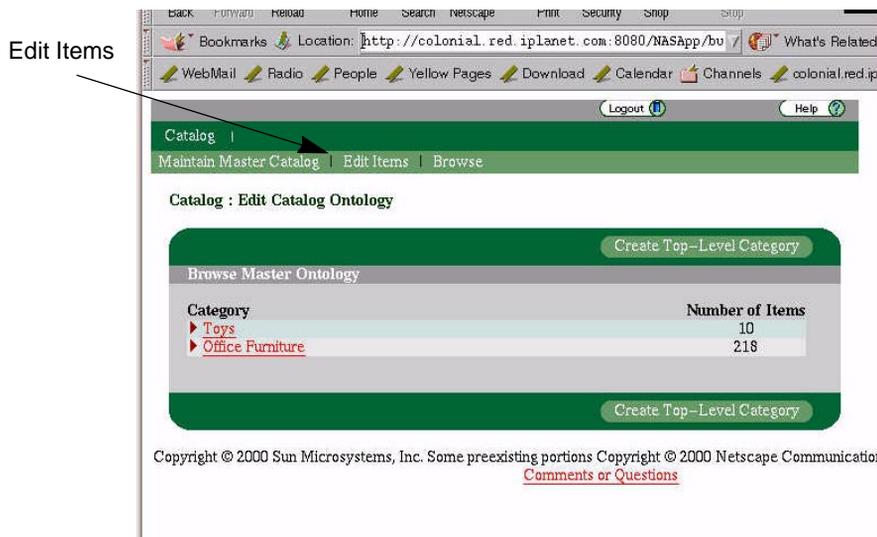
Password: **admin**

4. When the Edit Catalog Ontology screen displays, click Catalog, located on the upper left hand side of the screen.

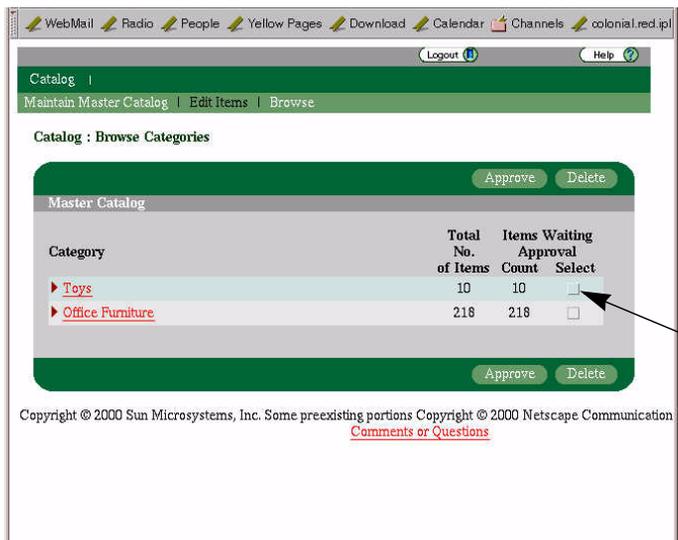


5. This screen displays. You will notice that there are now options to select under the Catalog field (Maintain Master Catalog, Edit Items and Browse).

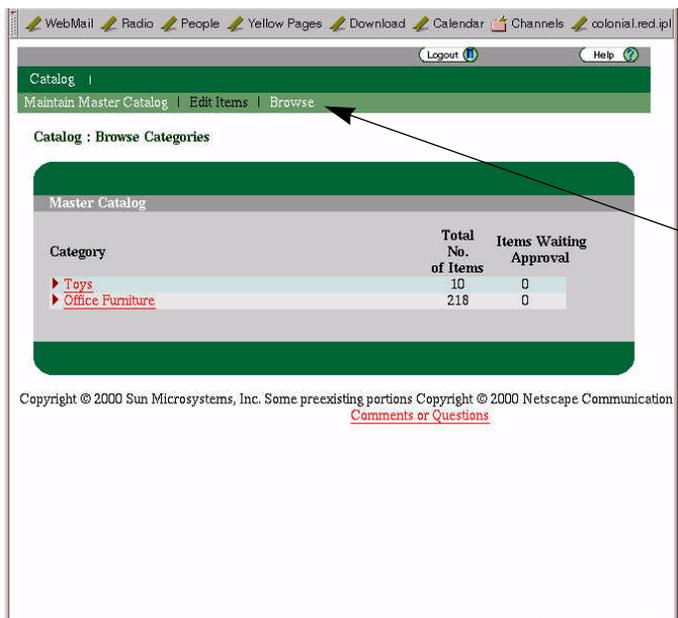
6. Click Edit Items.



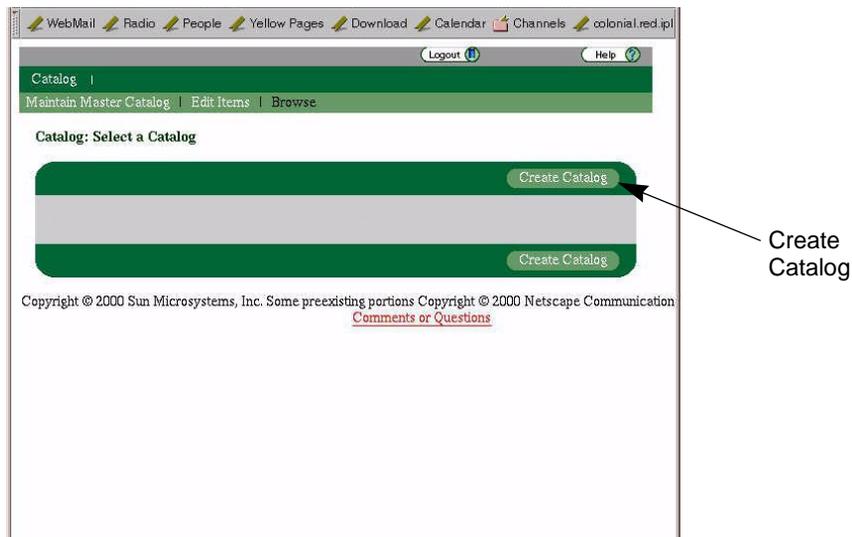
- From this screen, check the boxes located on the right side of the screen, under the heading Select. Click Approve.



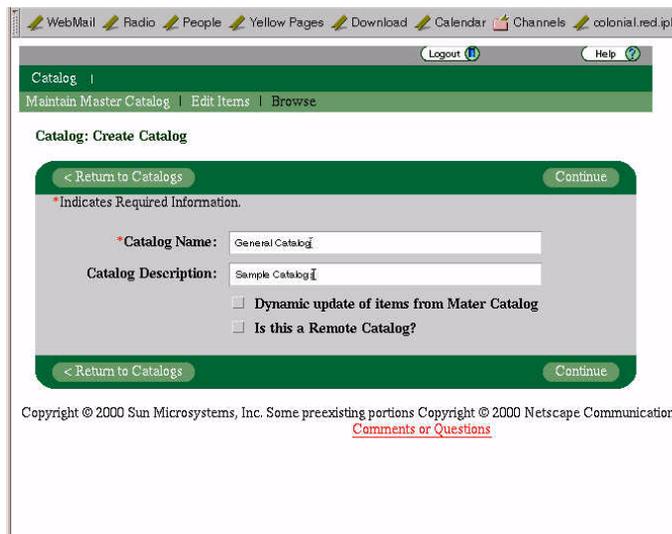
- When this screen displays, click Browse, located near the top of the screen.



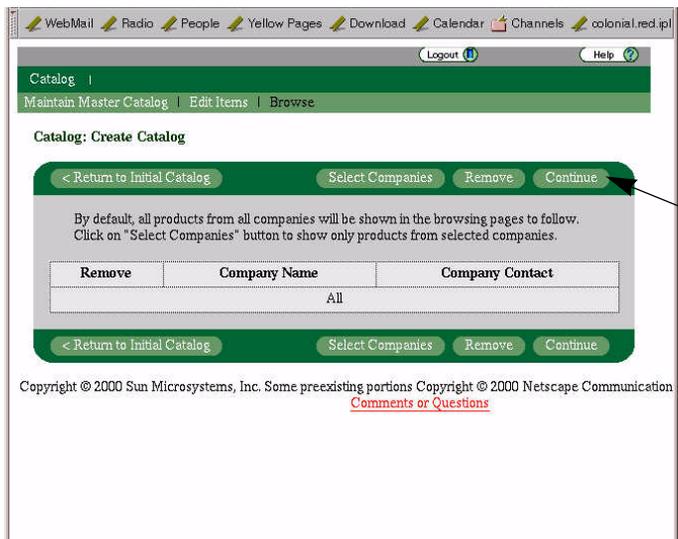
9. When the Create Catalog screen displays, click Create Catalog.



10. When this screen displays, enter the catalog name and description in the appropriate fields, then click Continue.

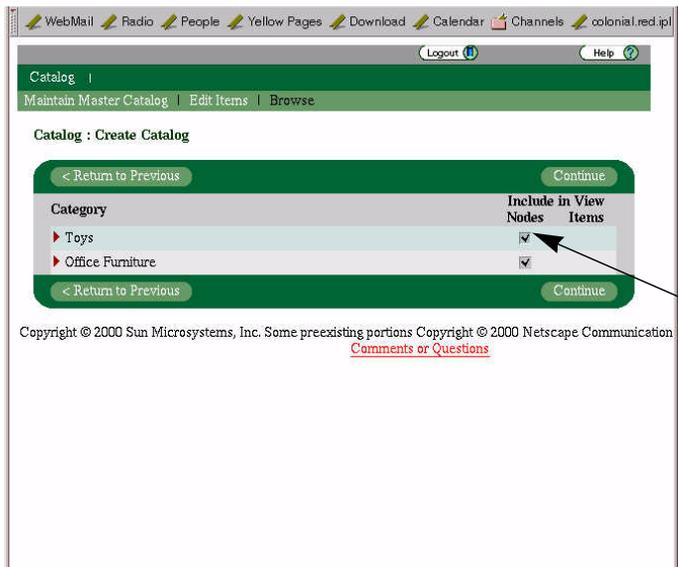


11. At this screen, click Continue.



Continue

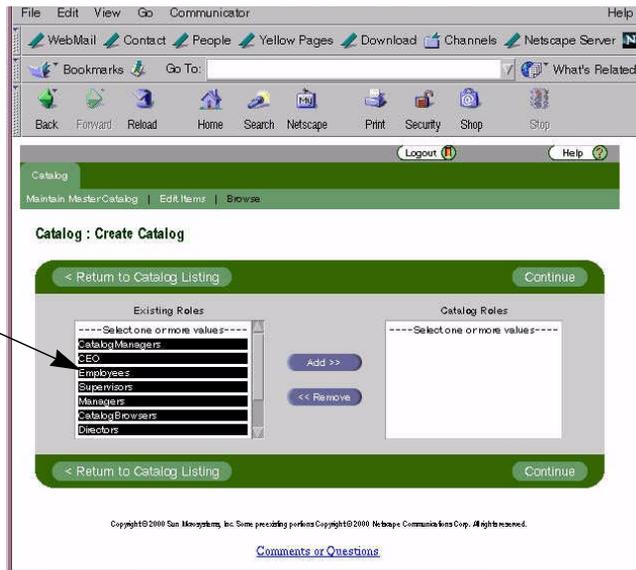
12. When this screen displays, click the two boxes under Include in Nodes, then click Continue.



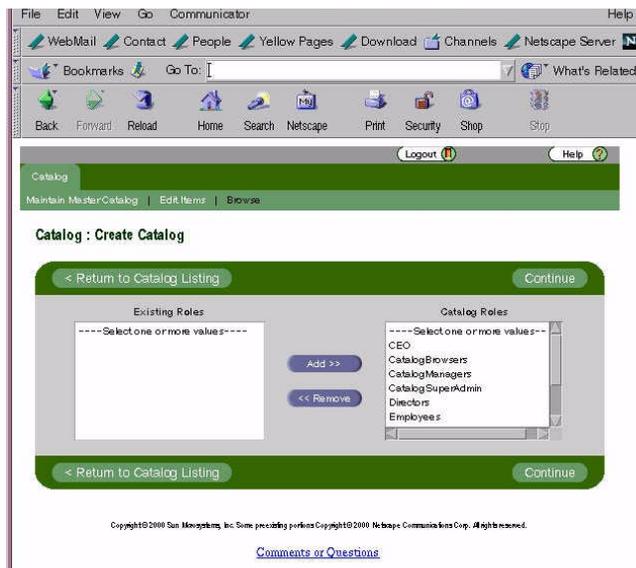
Include in Nodes

13. When this screen displays, select all the values under Existing Roles so that they are highlighted, then click Add.

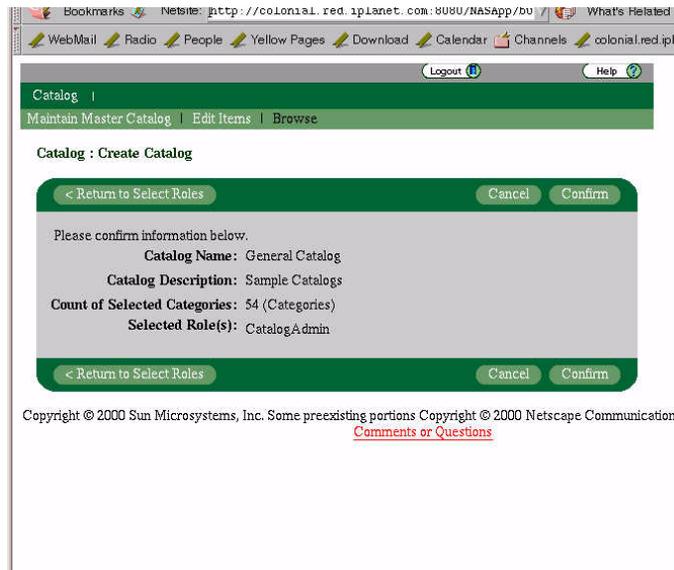
Select all values



14. When this screen displays, the Catalog Admin line item should have moved from the Existing Roles to the Catalog Roles section. Click Continue.



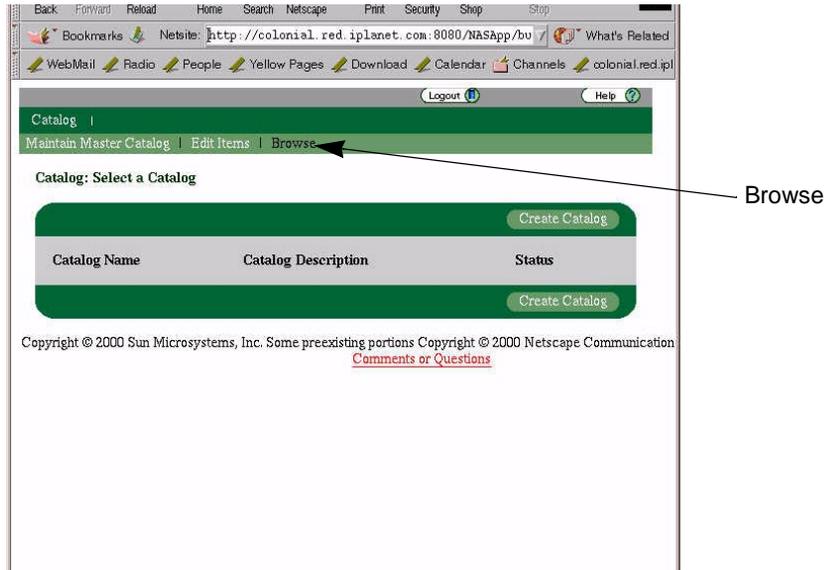
15. When this screen displays, click Confirm.



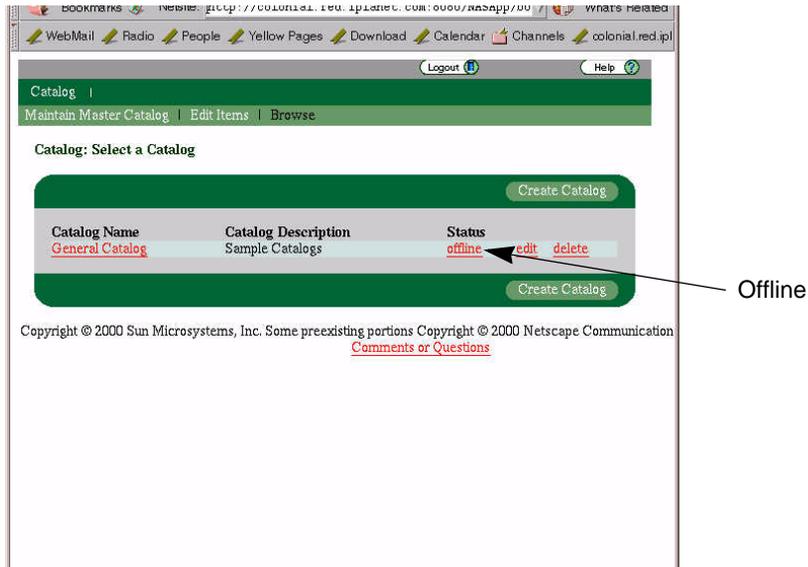
16. This message displays. Click OK.



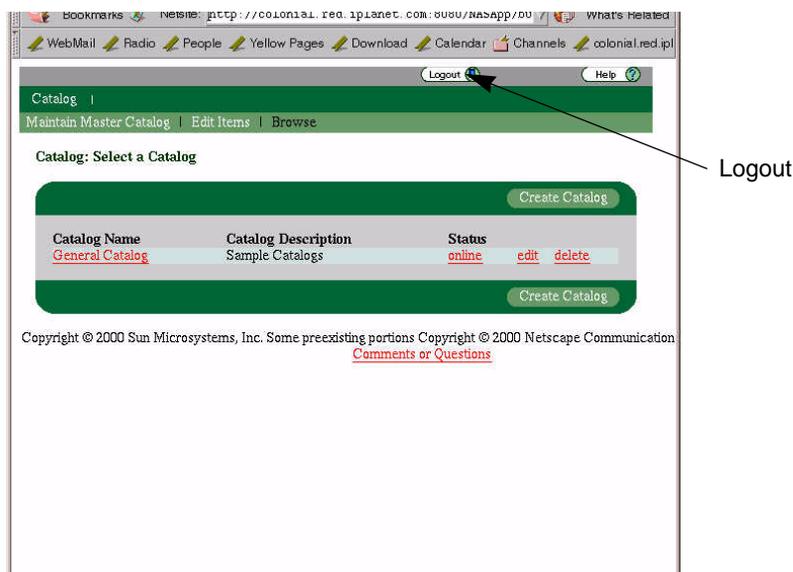
17. This screen displays when the system is finished creating the catalogs. Wait for the catalogs to be created (approximately 3 minutes), then click Browse.



18. When this screen displays, click offline, located under Status.



19. When this screen displays, you will noticed that the status has changed to online. The General Catalog is now available.
20. Click logout, located on the upper right side, to log out.



Creating Membership Indexes

For membership performance improvements, you need to create the following indexes in your membership Directory Server if they do not already exist:

iplanetcguild
 iplanetecparentorgguid
 uid
 sn
 cn
 ou
 o
 displayname

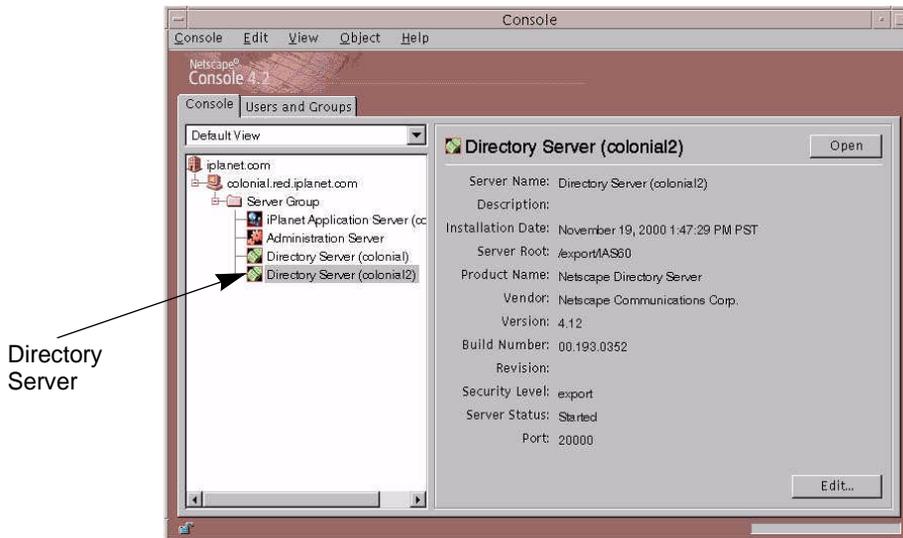
1. To create indexes, you need to run startconsole from the IAS home directory.

```
% ./startconsole
```

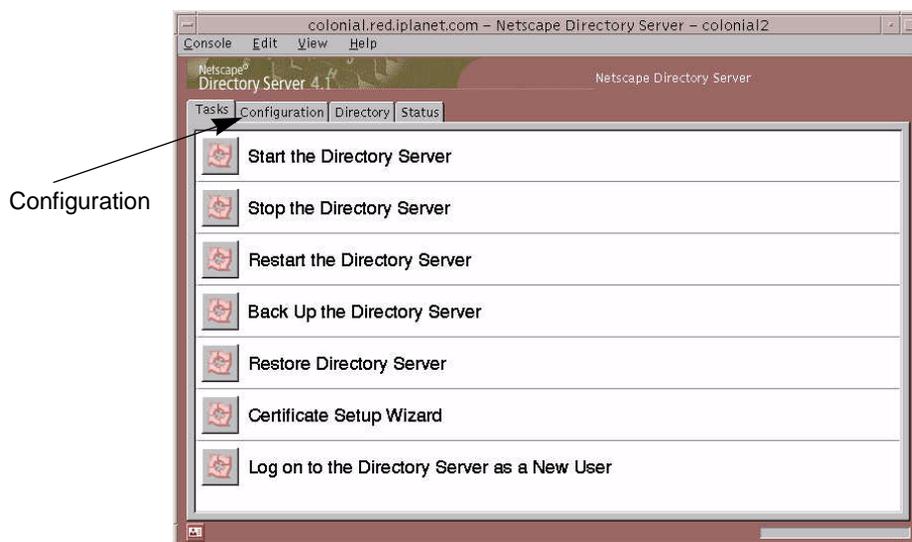
2. The console screen displays.



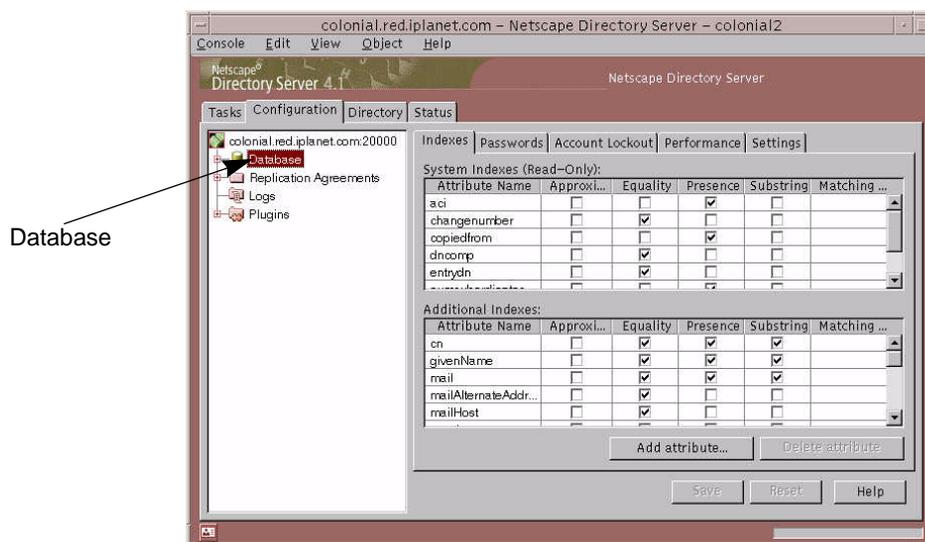
3. Enter the administrator password you gave when you installed Process Manager. Click OK.
4. Double click on the Directory Server that you created under the Server Group.



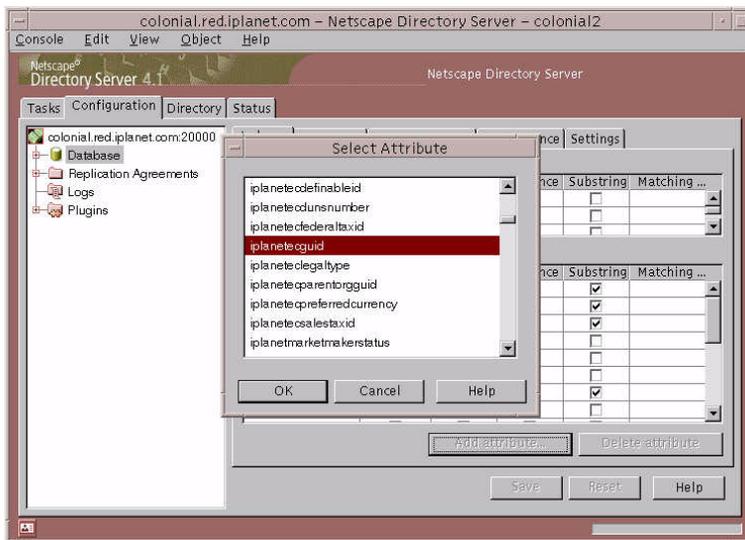
5. When this screen displays, select the Configuration tab.



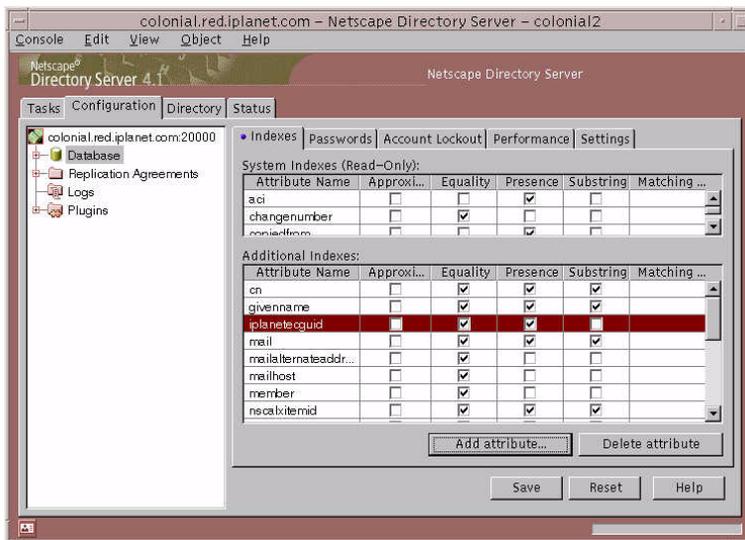
6. When this screen displays, highlight Database, located on the left side. Click Add Attribute.



- The Select Attribute window displays. Select `iplanetecguid` and click OK.



- You will see that `iplanetecguid` is now under the Addition Indexes with attribute Equality and Presence checked.



- Now you need to add the other attributes, repeating the previous steps. Click Add Attribute to add all these attributes:

iplanetecparentorgguid

uid

sn

cn

ou

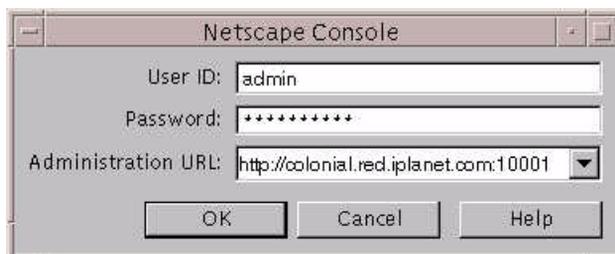
o

displayname

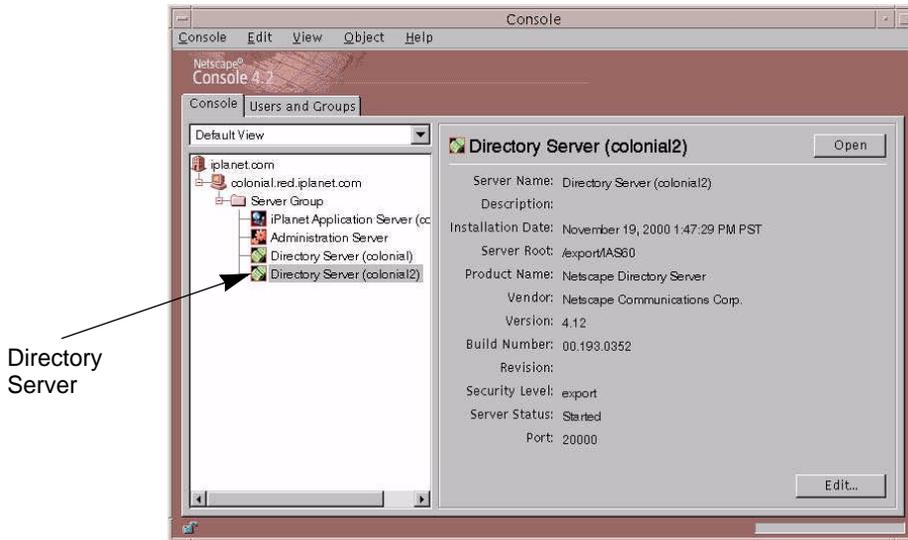
10. When you are finished, click Save and restart the server.

Set the Look-through Limit to Unlimited

11. Run `startconsole` from the IAS home directory.
12. The console screen displays.
13. Enter the administrator password you gave when you installed Process Manager. Click OK.

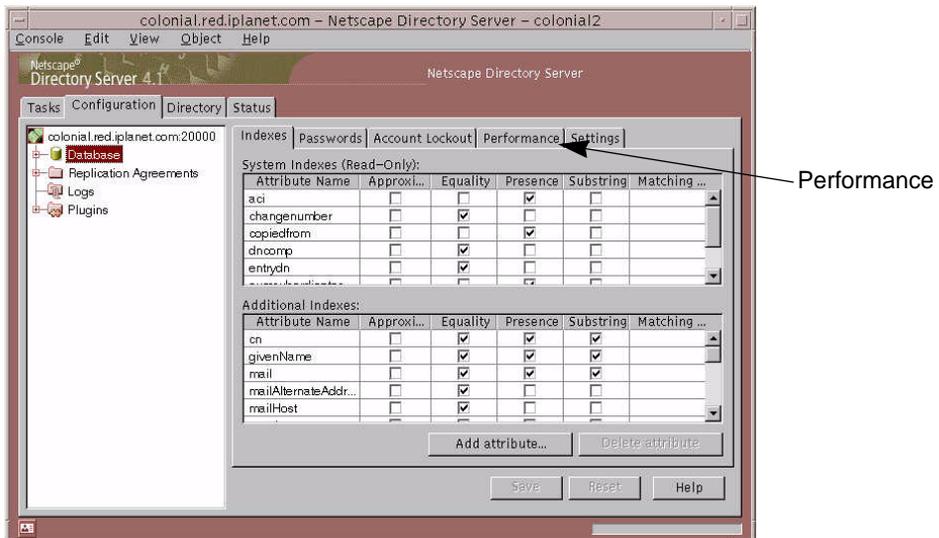


14. Double click on the Directory Server that you created under the Server Group.

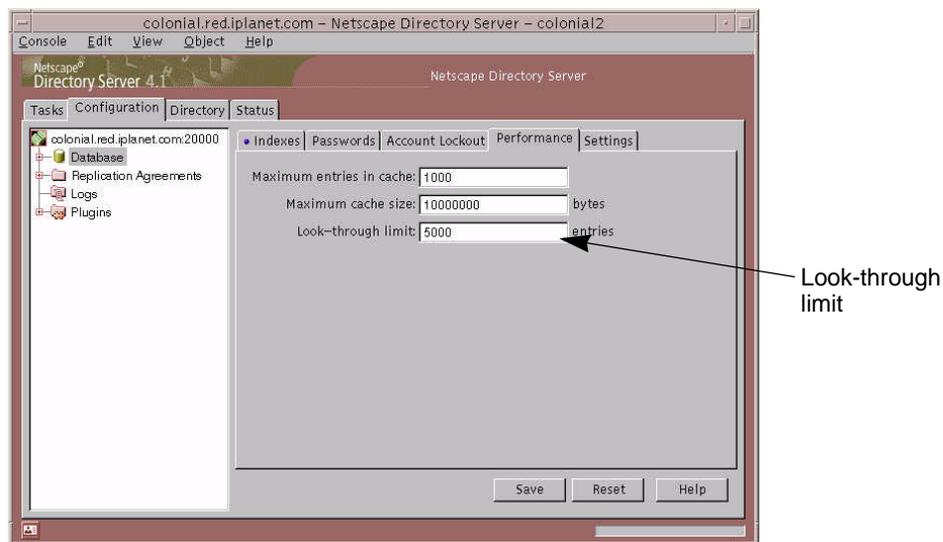


15. Select the Configuration tab and highlight Database on the left side.

16. Select the Performance tab.



17. The default value for the look-through limit is 5000. In this field, type -1.



18. Click Save and restart the server.

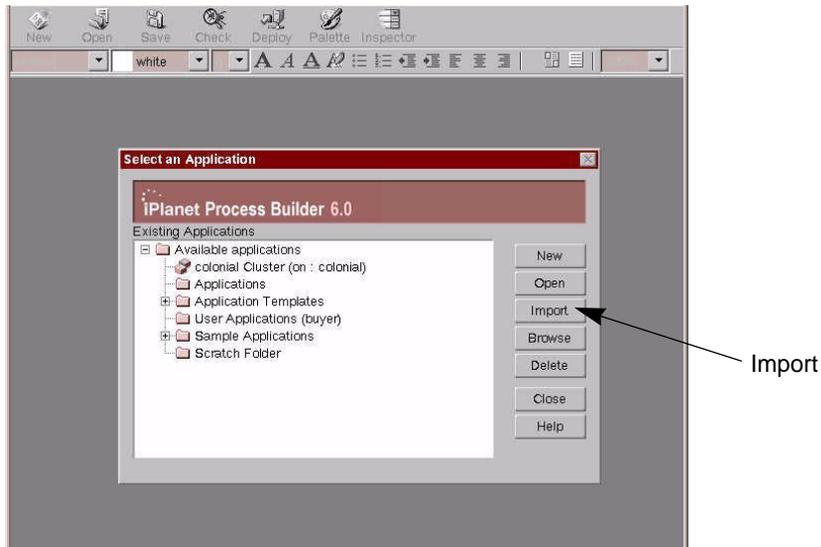
Running the Process Builder

To deploy a sample application, as follows,

1. Run the Process Builder:

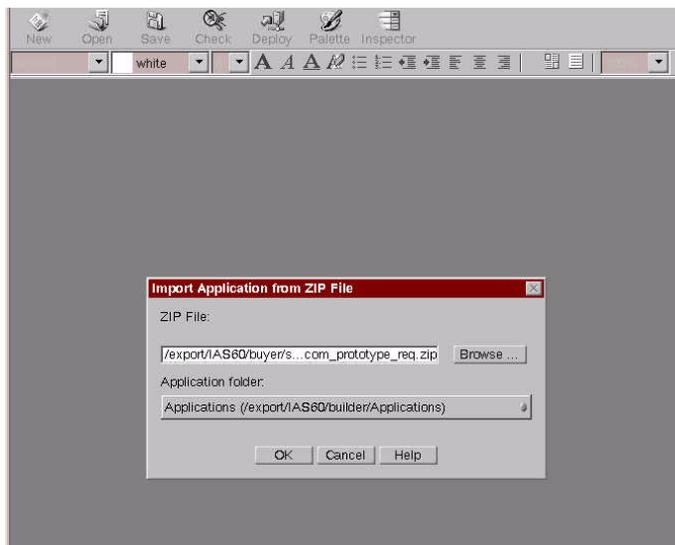
```
% IAS_ROOT/builder/Builder.sh &
```

2. When the Process Builder screen displays, click Import.

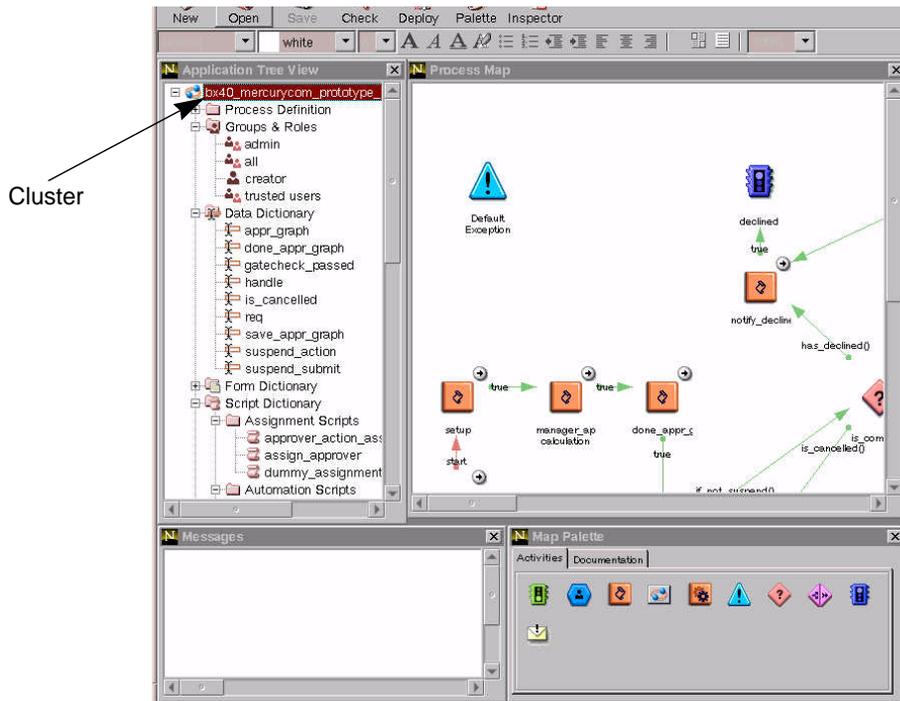


3. When the Import Application window displays, enter the zip file location and then click OK:

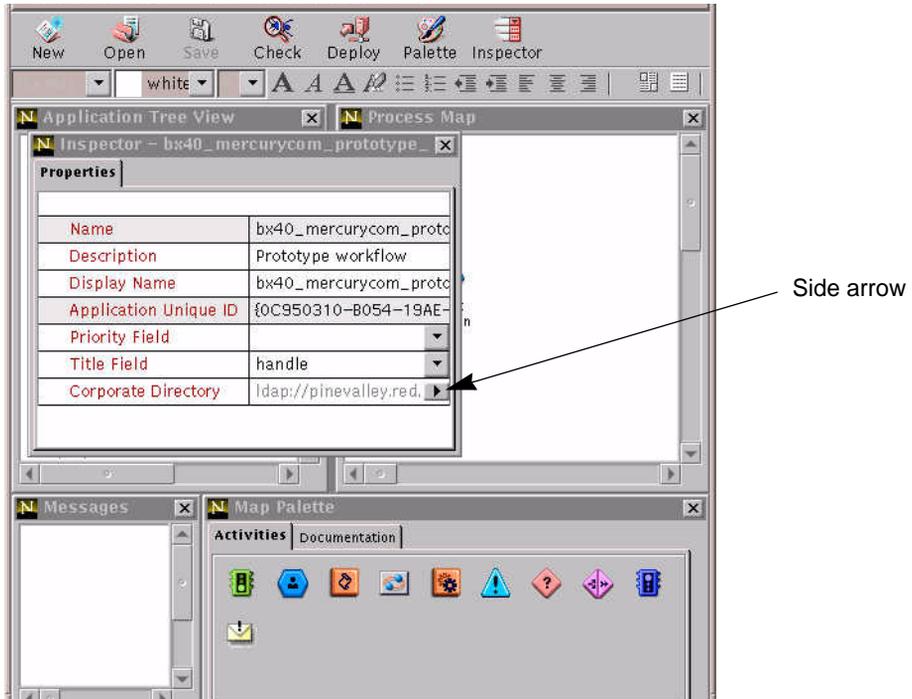
IAS_ROOT/buyer/sample_data/workflow/bx40_mercurycom_prototype_req.zip



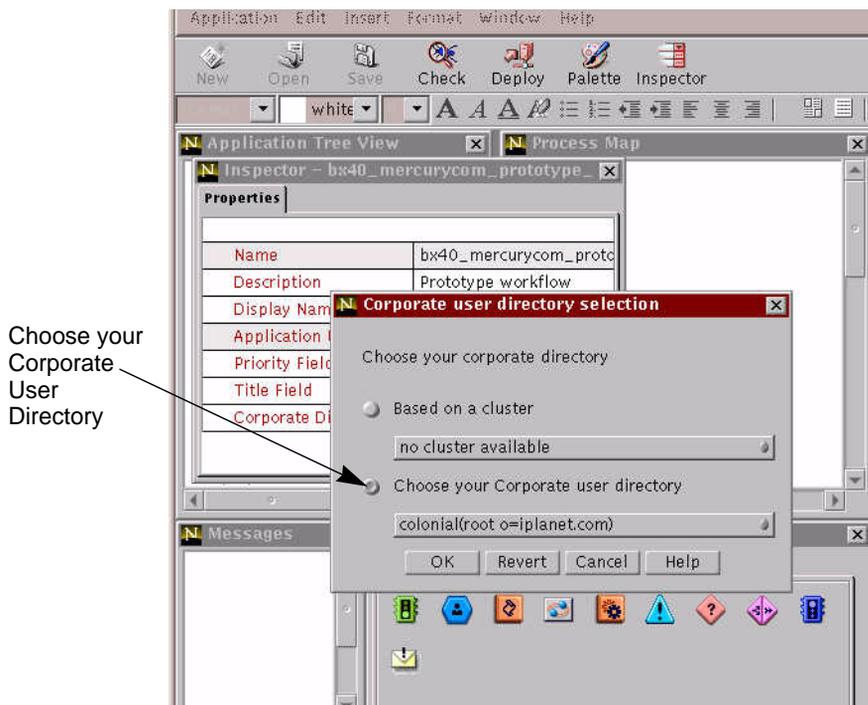
4. When this screen displays, the cluster that you just set up displays on the left side.



5. Double click on the bx40_mercurycom_prototype file name, located on the far left side of the screen.
6. When the Inspector screen displays, verify that the corporate directory contains the correct machine name. If not, click the side arrow button.

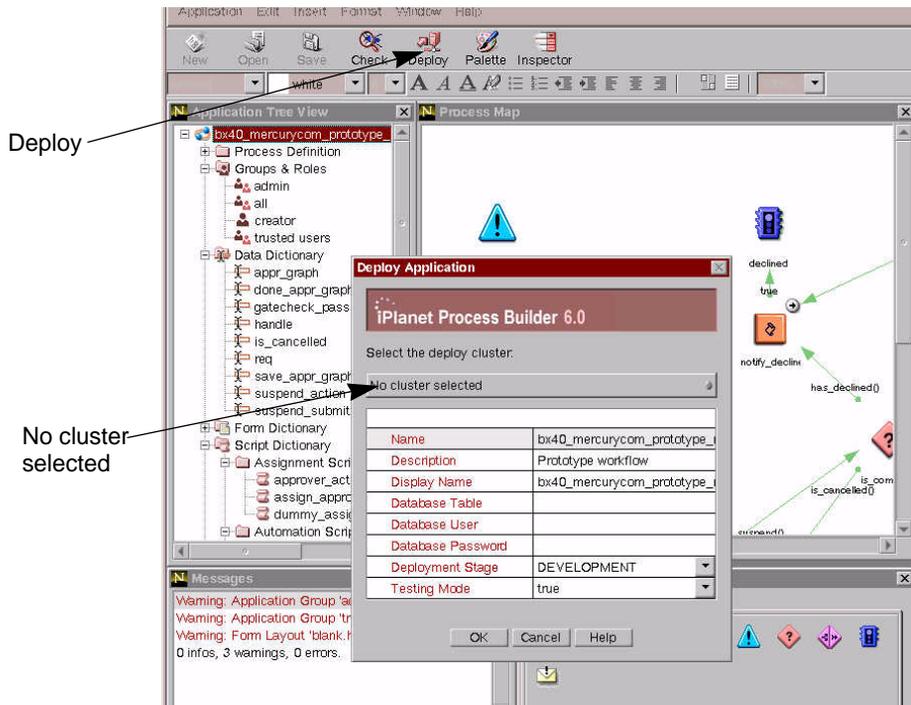


7. When the next screen displays, select Choose Your Corporate User Directory. Click OK.



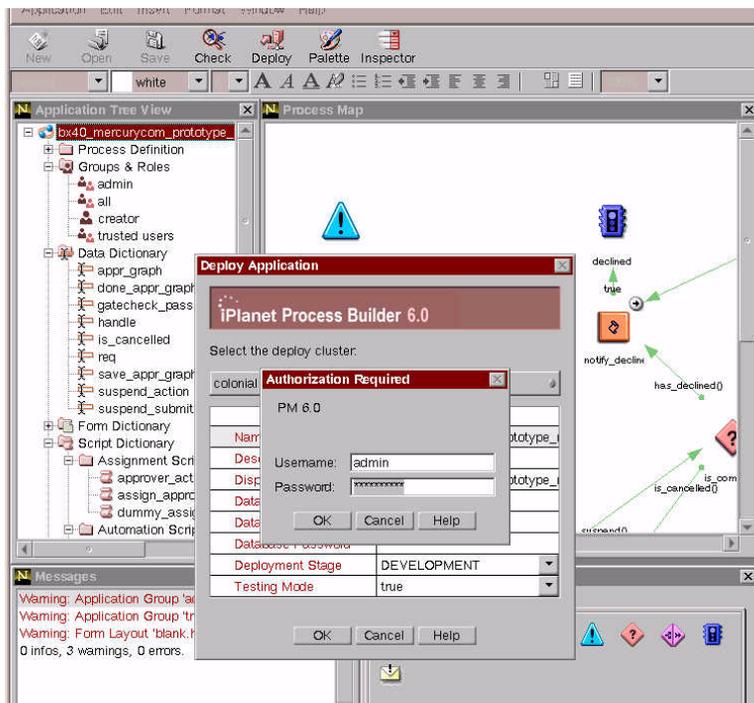
8. Close the Inspector screen and click Save.

9. Click Deploy (located in the row of buttons near the top of the screen).



10. Select the cluster by clicking No Cluster Selected and the drop down menu displays with the cluster that you previously created.

11. Enter your iAS user ID and password and click OK.



12. The Successful Deployment screen displays.

13. Go to the browser and type the URL:

`http://hostname:iwSPORT/Express.npm`

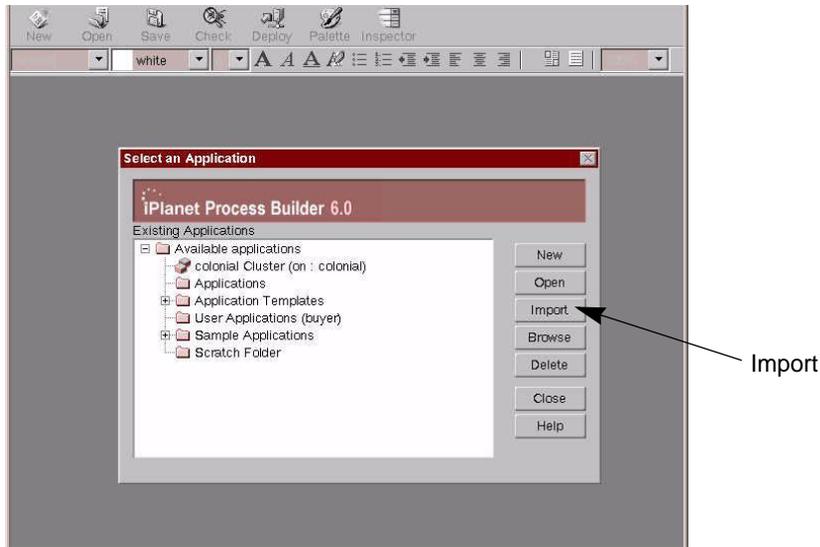
14. Click the New Process tab. The name of the application that you just deployed displays.

Importing Timecard Application

1. Run the Process Builder again:

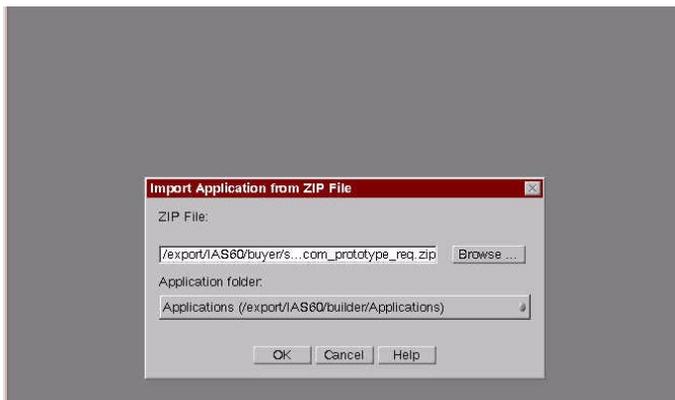
IAS_HOME/builder/Builder.sh

2. When this screen displays, click Import.

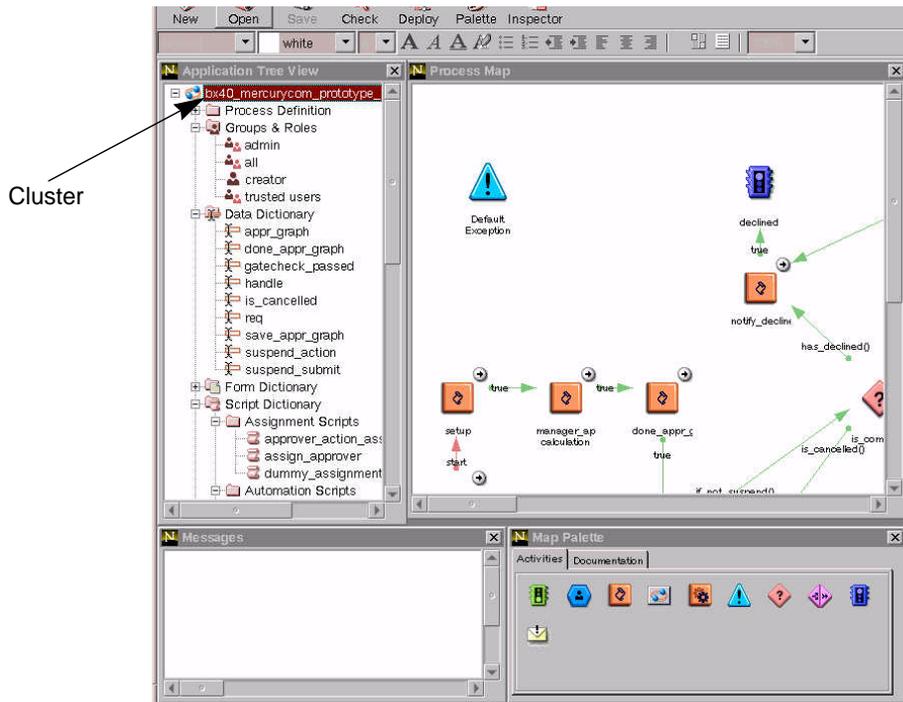


3. When the Import Application window displays, enter the zip file location and then click OK:

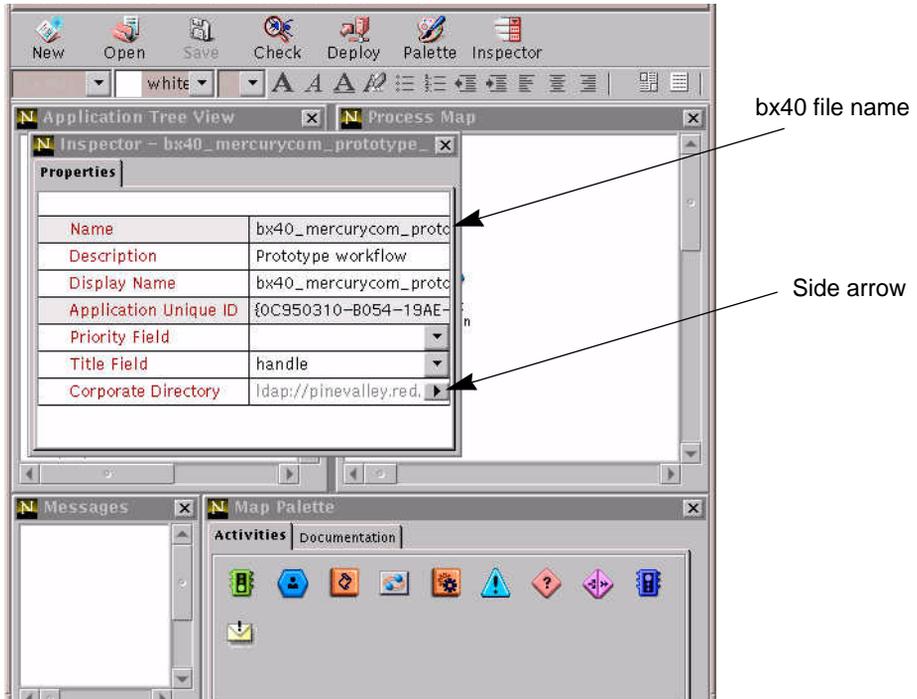
IAS_ROOT/buyer/sample_data/timecard/bx40_mercurycom_prototype_tc.zip



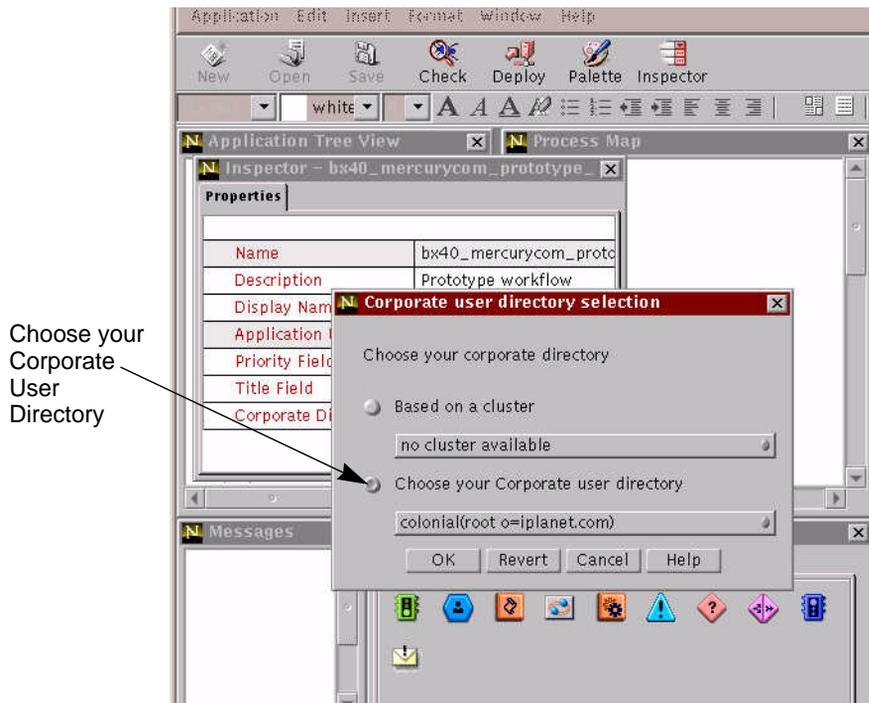
- When this screen displays, the cluster that you just set up displays on the left side.



5. Double click on the bx40_mercurycom_prototype file name, located on the far left side of the screen.
6. When the Inspector screen displays, verify that the corporate directory contains the correct machine name. If not, click the side arrow button.

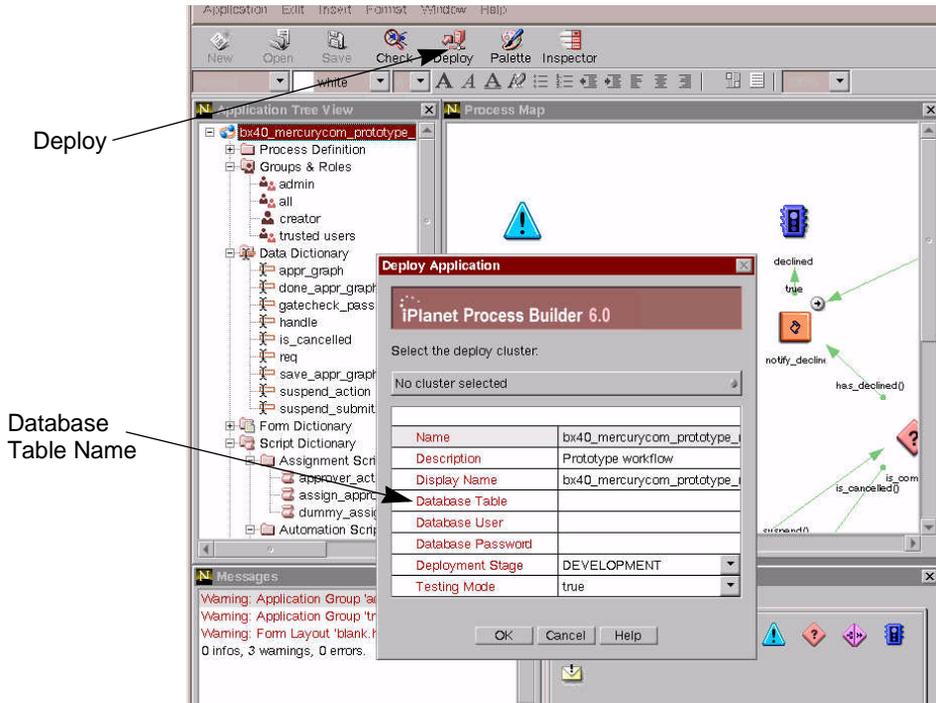


7. When the next screen displays, select Choose Your Corporate User Directory. Click OK.



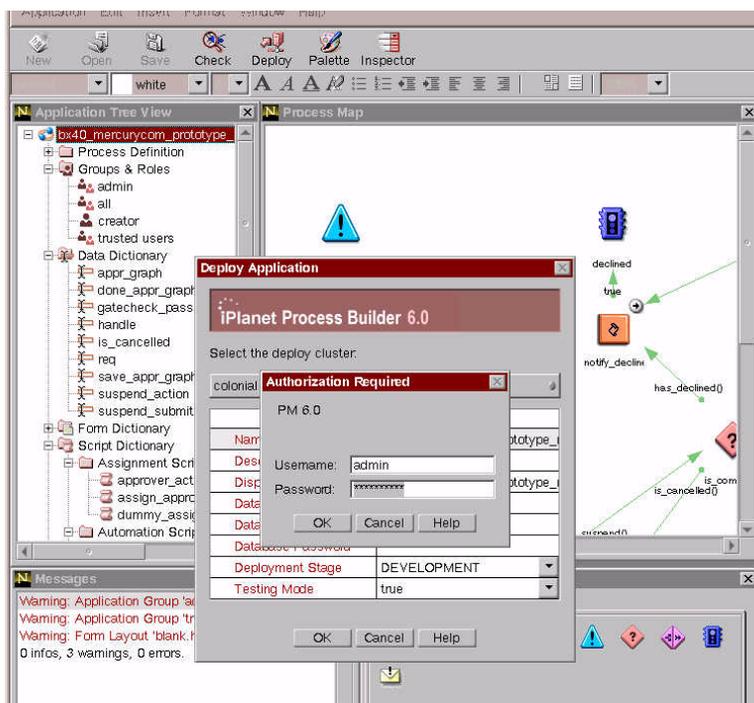
8. Close the Inspector screen and click Save.

- Click Deploy (located in the row of buttons near the top of the screen).



- The Database Table name must be changed from the previous deployment. Click the Database Table field and enter a new name for the timecard deployment.

11. Select the cluster by clicking No Cluster Selected and the drop down menu displays with the cluster that you previously created. Click OK.
12. Enter your iAS user ID and password and click OK.



13. The Successful Deployment screen displays.
14. Go to the browser and type the URL:
`http://hostname:iwSPORT/Express.npm`
15. Click the New Process tab. The name of the application that you just deployed displays.

The BuyerXpert software installation is complete.

Preparing the Seed Data Storage

You need to install seed data for BuyerXpert to work properly. If your BuyerXpert installation points to data stores populated with sample data, you do not need to install any seed data. Sample data includes the required seed data.

The procedures to install seed data consist of the following steps:

- Preparing the Directory Server data storage
- Prepare the Oracle data storage
- Load the application seed data

Preparing the Directory Server Data Storage

To prepare the Directory Server data storage before you can install seed data:

1. Create a new instance of Directory Server (see Chapter 3, Creating an iPlanet Directory Server (LDAP) Instance, for instructions).
2. Set the directory root, for example, `o=iplanet.com`.
3. Modify the schema on the Directory Server. You can do this either by including the schema files (a) or by applying schema modifications specified in ldif file format (b).
 - a. To include the schema files:
 - Pick your favorite path for these configuration files, located in your BuyerXpert installation directory:

path to ias/buyer/sample_data/directory_ldif/buyer/iplanet.

For example:

/iAS/iPlanet/iPM6/buyer/sample_data/directory_ldif/buyer/iplanet.

- Include lines similar to those shown below in the

`slapd-instance/config/ns-schema.conf` file:

`include path/iplanet-userx-schema.conf`

`include path/iplanet-ecommerce-schema.conf`

`include path/iplanet-vortex-schema.conf`

`include path/iplanet-buyer-schema.conf`

- After these changes to the `ns-schema.conf` file, restart the Directory Server:

`% slapd-instance/restart-slapd`

- b. To apply schema modifications specified in the ldif file format:

- Use the `schema.ldif` file, located in your BuyerXpert installation directory:

path to ias/buyer/sample_data/directory_ldif/buyer/iplanet/schema.ldif.

- Load the schema into a running Directory Server using `ldapmodify` as:

```
# ldapmodify -h host -p port -c -a -D dirMgr -w password\
-f ./schema.ldif
```

4. To load seed data use the loadSeedData script located in the BuyerXpert installation directory:

```
path to ias/buyer/sample_data/directory_ldif/buyer/iplanet
```

For example:

```
/iAS/iPlanet/iPM6/buyer/sample_data/directory_ldif/buyer/iplanet
```

5. Run the script loadSeedData.sh:

```
# loadSeedData.sh hostname port root_dn bind_dn bind_password ias_root_dir
```

Or, you can run the script with an additional parameter of WITH_SCHEMA:

```
# loadSeedData.sh hostname port root_dn bind_dn bind_password \  
ias_root_dir WITH_SCHEMA
```

Preparing the Oracle Data Storage

To prepare the Oracle data storage:

1. Create your database account (make sure that you have tablespace to do this first).

2. Verify that iAS has stopped:

```
IAS-ROOT/ias/bin/KIVAes.sh stop
```

3. Run the create_schema.sh script. This script does the following:

- o Creates user accounts
- o Creates all the tables/indexes in the user accounts.
- o Loads the seed data for the whole application, including the iPlanet MarketMaker catalog piece.

4. Before running the script, read the following notes:

NOTES	<p>This script should be run after installation of the product. Do not start the application.</p> <p>This script tries to drop the user if the user already exists. Drop the corresponding user manually before running this script.</p> <p>The tablespace must have already been created before running this script because it uses the tablespace to store all the data.</p>
--------------	--

5. This script uses this syntax:

```
create_schema.sh parameters [ CONNSTR ]
```

CONNSTR — Oracle connect string of the format `user/passwd@dbsource`

6. Valid parameters for this script are:

- b *BX_DATA* — populate BuyerXpert data only, does not load catalog name
- r *IASRoot* — IAS base directory, for example, `/export/IAS60/`
- u *USER/PASSWORD*— Oracle user login and password
- s *SYSTEM USER/PASSWORD*— Oracle system user and password
- d *DBSOURCE* — Oracle database access name
- o *ORACLE_HOME* — Pass this if you want to override the ORACLE_HOME environment variable.
- t *DATA TABLESPACE* — data tablespace to be used for the user
- i *INDEX TABLESPACE* — index tablespace to be used for the user

7. For example:

```
cd /export/netnscape/server4/buyer/sample_data/impexp_files/
./create_schema.sh -r /export/netnscape/server4/ -u bx/bx -d deepc
-s system/manager -o $ORACLE_HOME -t TS01 -i TS02
```

where:

`/export/IAS60/` is the *IAS Root*, *bx* is the account to be dropped or created (the schema and data are loaded into this), *deepc* is the Oracle database instance name, and *TS02* is the tablespace in the Oracle data.

8. The script can be found at:

`IAS-Root/buyer/sample_data/impexp_files/create_schema.sh`

Loading the Application Seed Data

To load the application seed data, the following tasks are required:

- Creating the install superuser
 - Importing the policy book
 - Cleaning up the install superuser
1. To create the install superuser, in your BuyerXpert installation (without any sample data), log in using `-/-/-` as your organization, followed by login name and password.
 2. Create a dummy organization for the superuser. For example, `InstallOrg`.
 3. Create a user with superadmin privileges. For example, `InstallUser`.

These are conveniences to allow administrative privileges, in the event that there is no super administrator available.

4. To import the policy book, start the application:

```
KIVAes.sh start
```

5. Log into the Admin interface as `InstallUser`.

For example:

```
InstallOrg/InstallUser/InstallUser
```

(or `-/-/-` if the database is empty)

6. Click the Import/Export tab.
7. Select the files to be imported. Multiple files can be imported in the same screen.
8. Import the following files in this order:

```
IAS-ROOT/buyer/schema/cleardb.imp
```

(This file clears the policy tables and objects.)

```
IAS-ROOT/buyer/schema/role.imp
```

(This file imports roles.)

```
IAS-ROOT/buyer/schema/policy.imp
```

(This file imports policies.)

After the install is complete and you are satisfied with the data, it is recommended that you delete the InstallUser and InstallOrg. Before doing this, verify that you have other users designated as superadmins.

Installing Additional Software

Additional software must be installed to operate BuyerXpert correctly. Since some of this software is not included in the BuyerXpert CD and must be purchased separately, see the “Software Requirements” in Chapter 1 for a list of software included on the BuyerXpert installation package.

The following sections are contained in this chapter:

- Installing ECXpert
- Installing iPlanet Portal
- Installing Reuters Multi-Currency Live Feed

Installing ECXpert

ECXpert handles the exchange of business documents and messages between BuyerXpert and other OBI-compliant systems. The primary ECXpert services used by BuyerXpert are data transmission, a variety of communications protocols, and document tracking.

See the ECXpert documentation for installation instructions.

Installing iPlanet Portal

Installing iPlanet Portal consists of the following:

- Installing iPlanet Portal Server
- Adding a New Domain
- Adding a New Component

- Adding and Configuring BuyerXpert Channels
- Copying the Required Libraries
- Configuring the Portal Server
- Testing Channel Viewing
- Testing Single Login

Installing iPlanet Portal Server

1. To install the Portal Server, log in as superuser:

```
% su - root
```

2. Unzip the file:

```
% gunzip 3.0-fcs-image.tar.gz
```

3. Untar the file from the archive:

```
% tar -xvf 3.0-fcs-image.tar
```

```
% cd 3.0-fcs-image
```

4. To start the installation process:

```
% ./ipsinstall
```

The rest of this section documents the screens that are displayed during this installation. The default entries are shown in brackets and are recommended unless a specific entry is necessary; then, that entry is shown at the end of the prompt and in bold.

The Welcome screen displays:

```
Welcome to the iPlanet Portal Server Installer (domestic release)
```

```
The software for the iPlanet Portal Server product will run without a license.  
However, you must have purchased license from Sun Microsystems to use this  
product.
```

```
Do you accept? y
```

```
The ipsinstall log can be found at:
```

```
/var/opt/SUNWips/debug/ipsinstall.log.23639
```

```
Checking for software compatibility issues...
```

```
Checking java version ...
```

Checking for required patches ...

WARNING: patch 106409-01 is recommended/required for
JDK 1.2.2 on SunOS 5.6

Required/recommended patch(es) not found. Said patches may or may not apply to your system. Only continue if you are sure they do not apply. Test this by attempting to install them. Please see the iPlanet Portal Server Release Notes for information regarding downloading the patches.

Abort installation? **n**

Checking for existing 2.0.x installation ...done.

Checking for existing 3.0 installation ...done.

Installation of the iPlanet Portal Server software involves installing the following:

iPlanet Portal Server

iPlanet Portal Server Gateway

They do not need to be installed on the same machine.

Select which component to install:

- 1) Server
- 2) Gateway
- 3) Exit

Choice? **1**

Installing the iPlanet Portal Server server...

Do you want to use the default settings? **n**

What should the root of the role tree be named? **ipplanet.com**

What directory do you want to install the server in? [/opt]: **/disk0/portal**

You must install one Profile Server for each iPlanet Portal Server install group. Please select whether you'd like to install the Profile server on this machine, or whether this iPlanet Portal Server server should reference a Profile server installed on another host.

Should the local machine be the profile server? [y]/n: **y**

What is the host name of the machine where the Profile Server will run?
[jupiter1] - specify the name of the machine where the profile server should be installed.

What is the sub-domain name (“.” for none)? [red]

What is the domain name? [iplanet.com]

What port should the LDAP server use? [389]

What is the Portal Server super admin user name? [root]

Will/Do you have multiple servers in this install group? y/[n] **n**

Will/Do you have multiple gateways in this install group? y/[n] **n**

(Even though the installation asks you for information about the gateway, the gateway will not be installed and it is not needed, so use the default values)

What is the host name of the machine where the Gateway Server will run?
[jupiter1]

What is the sub-domain name (“.” for none)? [red]

What is the domain name? [iplanet.com]

Should this/these gateway(s) use a web proxy? y/[n] **n**

What port will the gateway encrypting proxy (eproxy) run on? [443]

Do you want to run SSL between the iPlanet Portal Server Gateway(s) and Server(s)? y/[n] **n**

What is the Profile Server port? [8080]

NOTE Do not use the iWS and iAS port numbers here or your BuyerXpert installation may be erased.

What is the Admin Server port? [8888]

The iPlanet Portal Server administration password will be used to manage and install certificates on the gateway and the server, to configure the web and LDAP servers, and to allow secure communication between the gateway(s) and server(s).

Please enter the same password for each server/gateway in this iPlanet Portal Server install group.

iPlanet Portal Server admin password (8 chars minimum): **adminadmin**

Re-enter iPlanet Portal Server admin password: `adminadmin`

Do you want to start the iPlanet Portal Server when installation is complete?
y/[n] **n**

You have selected not to start the iPlanet Portal Server.

You will need to start it manually prior to accessing iPlanet Portal Server.

Currently selected settings:

Portal Server : `http://jupiter1.red.iplanet.com:8080`
Portal Server Gateway : `jupiter1.red.iplanet.com:443`
Profile Server : `http://jupiter1.red.iplanet.com:8080`
LDAP Server : `jupiter1.red.iplanet.com:389`
Web Proxy : `false`
Role Tree Root : `iplanet.com`
Installation Directory : `/disk0/portal`
Start Portal Server: **n**

Are all settings correct? [y]/n **y**

Installing packages

SUNWwtsdd...

SUNWwtws...

SUNWwtsvd...

SUNWwtddt...

SUNWwtm...

SUNWwtmf...

SUNWwtw...

SUNWwtwdoc...

SUNWwtwam...

SUNWwtwds...

iPlanet Portal Server has been successfully installed. If you would like to use the Netfile application to access PC's running Win95, Win98 or NT (via SAMBA), install the CD entitled 3rd party software, and run the install_3ps script.

Select which component to install:

- 1) Server
- 2) Gateway
- 3) Exit

Choice? [3] 3

5. To install the Portal Server Service Pack 1:

```
% su - root
% unzip iPS3.0SP1-01.tar.zip
% tar -xvf iPS3.0SP1-01.tar
% cd iPS3.0SP1-01
```

6. To start the installation of the Service Pack 1:

```
% ./installpatch .
```

The following screens display as the Service Pack is installed.

WARNING: /usr/sbin/patchadd is being used to install this patch.

Installpatch will be removed from Solaris patches in the next release of Solaris.

Checking installed patches...

Executing prepatch script...

Verifying sufficient file system capacity (dry run method)...

Patch number iPS3.0SP1-01 has been successfully installed.

See /var/sadm/patch/iPS3.0SP1-01/log for details

Executing postpatch script...

updating classpath...

updating domain URL list...

Operation completed successfully.

updating iwtGateway schema...

Operation completed successfully.

updating iwtGateway attributes...

Operation completed successfully.

postpatch processing complete.

Patch packages installed:

SUNWwtds

SUNWwtdt

SUNWwtmf

SUNWwtm

SUNWwtsdd

SUNWwtsvd

7. After the installation is complete, start the Portal Server:

```
% cd portal-server-installation-directory
```

```
% cd SUNWips/bin
```

8. Shut down all the Portal Server related processes:

```
% ./ipsserver stop
```

9. Start up the Portal Server:

```
% ./ipsserver start
```

Adding a New Domain

All the Portal integration related files are included when you install BuyerXpert. They are located in the *SERVER_ROOT*/buyer/buyer/BXPORTAL directory, shown as *PORTAL_ROOT* in this document. Since the Portal Server runs as root on your system, all of the steps have to be performed as the root user of the system on which Portal Server is installed.

1. To access the Portal Server admin console, type:

```
http://machinename:port/console
```

Note that machinename is the name of the machine running portal and *port* is the port number of the Web Server where portal is running.

2. Type root as the user name and the root password of your machine as the password.
3. After you log in, click the Manage Domains Link on the left panel.
4. Click Add New Domain, located in the right panel.
5. Enter the buying company name for the domain name, for example, mercury.com, and Buyer for the Default Role. Click Create.
The message, Successfully Created New Domain, displays.
6. Click Continue.
7. Choose the domain that you just created, click Authentication, select Membership from the Authentication Screen and click Submit.
8. Log out from the console.

Adding a New Component

BuyerXpert integration in Portal relies on certain BuyerXpert-specific attributes to be created in the user profile, when a new user is created.

1. Shut down the Portal Server:

```
% cd portal-server-installation-directory
% cd SUNWips/bin
% ./ipsserver stop
```

2. Backup your existing templates:

```
% cd /etc/opt/SUNWips/auth/default
% mv Membership.properties Membership.properties.orig
% mv register.html register.html.orig
```

3. Copy the new templates from the PORTAL_ROOT:

```
% cp PORTAL_ROOT/templates/Membership.properties
/etc/opt/SUNWips/auth/default/
% cp PORTAL_ROOT/templates/register.html
/etc/opt/SUNWips/auth/default/
```

4. Backup the template for UserInfo:

```
% cd /etc/opt/SUNWips/desktop/default/iwtUserInfoProvider
```

```
% mv edit.template edit.template.orig
```

5. Copy the new template for UserInfo:

```
% cp PORTAL_ROOT/templates/edit.template
/etc/opt/SUNWips/desktop/default/iwtUserInfoProvider/
```

6. Add a new component for loading BuyerXpert specific attributes for the user during authentication:

```
% cp PORTAL_ROOT/xml/bxAuth.xml /etc/opt/SUNWips/xml/
```

7. Start up the Portal Server:

```
% cd portal-server-installation-directory
```

```
% cd SUNWips/bin
```

```
% ./ipsserver start
```

8. Import the component:

```
% cd portal-server-installation-directory
```

```
% cd SUNWips/bin
```

```
% ./ipsadmin -import /etc/opt/SUNWips/xml/bxAuth.xml
```

The message, Operation Completed Successfully, displays.

Adding and Configuring BuyerXpert Channels

To add the BuyerXpert-related channels to the Portal Server and configure them:

1. Copy the properties file to some location and make sure that is accessible by Portal:

```
% cp PORTAL_ROOT/config/buyerInfo.properties location accesible to portal server/
```

2. Edit the entries in the buyerInfo.properties file, so that you point to the correct database, Directory Server (LDAP) and BuyerXpert settings.

3. Copy the headerNames.properties file to the same directory as your buyerInfo.properties:

```
% cp PORTAL_ROOT/config/headerNames.properties same location as buyerInfo.properties
```

4. Customize the headerNames.properties file if you want the field names in the channels to appear differently.

5. Copy the XML descriptors for the channels:

```
% cp PORTAL_ROOT/xml/iwtReqStatProfileProvider.xml
portal-server-installation-directory/SUNWips/sample/desktop/xml/

% cp PORTAL_ROOT/xml/iwtInboxProfileProvider.xml
portal-server-installation-directory/SUNWips/sample/desktop/xml/
```

6. Edit both the XML descriptors to reflect the location of the properties file. Open them in your preferred text editor and look for an attribute called “fileLocation”. Change the value for this attribute from /export to the location of the properties file, save and close the descriptors.**7. Import the XML descriptors using ipsadmin:**

```
% cd portal-server-installation-directory

% cd SUNWips/bin

% ./ipsadmin -import
portal-server-installation-directory/SUNWips/sample/desktop/xml/iwtReqStatProfileProvider.xml

% ./ipsadmin -import
portal-server-installation-directory/SUNWips/sample/desktop/xml/iwtInboxProfileProvider.xml
```

8. After importing each of the above mentioned descriptors, the message Operation completed successfully displays.**9. Copy the class files to the Portal:**

```
% cp -r PORTAL_ROOT/classes/com
portal-server-installation-directory/SUNWips/lib/

% mkdir -p portal-server-installation-directory/SUNWips/public_html/servlet

% cp PORTAL_ROOT/classes/*.class
portal-server-installation-directory/SUNWips/public_html/servlet/
```

10. Include the servlet directory in the classpath of the Web Server by editing the jvm12.conf file in the Web Server config directory:

```
% cd portal-server-installation-directory /netscape/server4/https-webserver/config
```

11. Edit the jvm12.conf file, locate the jvm.classpath variable and append:

```
portal-server-installation-directory/SUNWips/public_html/servlet
```

Add the channels to the available channels list by following these steps:

12. Access the Portal Server Admin console by entering:

```
http://machinename:port/console
```

13. Log in as root.
14. Click the Manage Domains link and select the domain that you created.
15. Expand the Applications link and select Desktop. The Available and Selected Providers list displays.
16. In the Channel Name field, type:


```
iwtReqStatProfileProvider
```
17. For the Class Name text box, type:


```
com.iplanet.portalserver.providers.buyerx.RegStatProfileProvider
```
18. Click Add and then click Submit, located at the bottom of the page, to update the Profile Server.
19. In the Channel Name text box, type:


```
iwtInboxProfileProvider
```
20. In the Class Name text box, type:


```
com.iplanet.portalserver.providers.buyerx.InboxProfileProvider
```
21. Click Add to add the channels to the available channels list.
22. Click Submit, located at the bottom of the page, to update the Profile Server.
23. Click Logout.

Copying the Required Libraries

1. Shut down the Portal Server.
2. Copy the oracle jdbc driver, jdbc jar and the ldapjdk jar from the BuyerXpert installation directory to the Portal Server lib directory:

```
% cp IAS_SERVER_ROOT/buyer/lib/classes12.jar
portal-server-installation-directory/SUNWips/lib/
% cp IAS_SERVER_ROOT/ias/classes/java/jdbc20.jar
portal-server-installation-directory/SUNWips/lib/
% cp IAS_SERVER_ROOT/ias/classes/java/ldapjdk.jar
portal-server-installation-directory/SUNWips/lib/
```

3. Expand the classes12.jar that you just copied:

```
% cd portal-server-installation-directory/SUNWips/lib/
```

```
% jar -xvf classes12.jar
```

4. Include these jar files in the CLASSPATH of the ipshttpd script:

```
% cd portal-server-installation-directory/SUNWips/bin
```

5. Edit the ipshttpd script, locate the IPS_CLASSES variable and add to the list of jar files:

```
lib/classes12.jar:lib/jdbc20.jar:lib/ldapjdk.jar
```

Configuring the Portal Server

1. Make sure that the Portal Server is shut down.
2. Edit the obj.conf of the Portal Server to add a redirect:

```
% cd portal-server-installation-directory/netscape/server4/https-webserver/config
```

3. Add the following line to the obj.conf, right below the *Object name=default*:

```
NameTrans fn="redirect" from="/NASApp/buyer/"
url-prefix="http://server name of buyer:port num of buyer/NASApp/buyer/"
```

Since the Portal installation runs on a different server, all the BuyerXpert related images cannot be seen when you perform a single login through Portal. Create a link in the Portal Server's docroot directory to the images to solve this.

Configuring the iPlanet Web Server

Because of security issues with Javascript, it is necessary to configure the iPlanet Web Server.

1. Copy the track.html, welcome.html and inbox.html templates to the docroot of the Web Server.

```
% cp PORTAL_ROOT/templates/track.html BUYER_WEB_SERVER_DOCROOT/
```

```
% cp PORTAL_ROOT/templates/welcome.html BUYER_WEB_SERVER_DOCROOT/
```

```
% cp PORTAL_ROOT/templates/inbox.html BUYER_WEB_SERVER_DOCROOT/
```

2. Make sure that the entries for bxInboxScreen, bxWelcomeScreen, bxTrackScreen in the buyerInfo.properties file reflect the correct URLs for the three files that you just copied.

Testing Channel Viewing

To test to see if you can view the channels:

1. Log in to the Portal as a user. If you are a new user, click New User to register:

`http://machine_name:port_number/login?domain=/domain_name`

2. Select the Content link and add the listed BuyerXpert Track Requisitions and the BuyerXpert Approval Inbox channels to the desktop. The channel information is displayed.

If there are requisitions in BuyerXpert that you created or if there are any in your inbox, they will be summarized in the appropriate channels.

Testing Single Login

Single login is enabled for every user by default, unless you entered no or false during the new user registration. To test the single login function:

1. Log in to the Portal and click Edit in the User Information channel in the top left corner of the page.
2. You will see a section called BuyerXpert Information containing all the relevant settings.
3. If the value for Enable Single-signon field either says no or false, then the single login has been disabled. Type Y or Yes in this field to enable it.

Single login allows you to log in once to Portal and have access to BuyerXpert data without the additional BuyerXpert login screen displaying.

Installing Reuters Multi-Currency Live Feed

With the Reuters (TM) multi-currency live feed, you can retrieve prices on multi-instrument and multi-field quote lists in a single request. You send a list of the instruments and the fields to the Reuters Investor portfolio server. The latest available prices for these instruments are returned in XML or HTML format. Optionally, you may specify a single base currency to convert all prices to that currency.

Up to twenty fields may be included in each request. The valid list of fields is included in the Reuters Investor Data Guides. By contract, you may not use any fields not included in the Data Guides.

Features of the multi-currency live feed include:

- Investor dataset is designed for private investors
- Lets you integrate Reuters investor data within your own web sites
- Data delivered from Reuters Geneva or New York web farms through the internet
- No Reuters hardware or software required
- Simple-to-use URL syntax for programmers
- “Ready-to-go” Reuters HTML templates for immediate use
- “As-you-want” XML for integrating in your own applets
- Authentication to protect you and Reuters
- Page-view pricing model

HTML Format

The HTML format is ready for immediate display in a browser. Using stylesheets, you can modify the Reuters default colors to match your web site's style.

XML Format

The XML format is for parsing using your server and reusing in new templates or applets. (To view the XML format in Netscape, select the right frame, click on mouse right button, and select View Frame Source.) You must respect Reuters online branding guidelines.

Before Installing

Your web site and server software that access Reuters Investors must have access to the public internet.

More information can be found at:

<http://www.reuters.com/onlinemedia>

Installation of Multi-Currency Live Feed

The file is located on Buyer CD `$BX_HOME/currconv` directory.

1. Contact Reuters to get the license.
2. Configure `CCLoad.Properties` file (sample below):

```
#####
# Properties file that sets variables to pull data from Reuters
#####
currConv.load.PullData.servername=webcache.sfbay.sun.com
(PROXY_HOSTNAME_NULL_IF_DIRECT_INTERNET_CONNECTION)

currConv.load.PullData.serverPort=8080

currConv.load.PullData.reutersHostname=ri2.rois.com

currConv.load.PullData.reutersPort=80

currConv.load.PullData.reutersSession=SESSION_ID

currConv.load.PullData.reutersFormat=XML

currConv.load.PullData.reutersRICs=JPYX FX (CURRENCY)

currConv.load.PullData.outDir=YOUR_OUT_DIR

currConv.load.CCLoad.CCFFile=YOUR_DIR/euro_fixed_rates.xml
```

3. Configure variables in `getData.csh` file (sample below):

```
#!/bin/csh
#####

#####
###
# This scripts pulls data from Reuters and populates the
currencyconversion table

# in billerXpert
#####

#####
#####

# sets JAVA_HOME, LD_LIBRARY_PATH, CLASSPATH
#####
```

```

source $BX_HOME/billxpert_env.csh (NEED MODIFY FOR BX4.1)
#####
# Please change the values accordingly
#####
setenv DATABASEPROPFIL $BX_HOME/currconv/database.properties
setenv REUTERS_PROP $BX_HOME/currconv/CCLoad.properties
# Pull data
$JAVA_HOME/bin/jre com.iplanet.ecomm.currconv.load.PullData
$REUTERS_PROP
# here get the OUTPUTDIR from the properties file.
setenv OUTPUTDIR `grep currConv.load.PullData.outDir
${REUTERS_PROP} | sed 's/.*=/'`
# load data
if ( -d $OUTPUTDIR/.Pulldata ) then
    ${JAVA_HOME}/bin/jre com.iplanet.ecomm.currconv.load.CCLoad
$OUTPUTDIR/.Pulldata
    $DATABASEPROPFIL reuter ${REUTERS_PROP}
else
    echo $OUTPUTDIR
    echo " Data Pull FAILED \!\!\! "
endif

```

4. Verify variable currConv.load.CCLoad.CCFFile, what is euro_fixed_rates.xml file (sample below):

```

<?xml version="1.0" standalone = 'no'?>
<CurrencyConversion>
<source>Reuters</source>
<convDate>2000.11.29 11:48:34 GMT+05:30</convDate>

<Convert>
<From>EUR</From>
<To>BEF</To>
<Factor>40.3399</Factor>

```

```
</Convert>
```

```
<Convert>  
<From>EUR</From>  
<To>DEM</To>  
<Factor>1.95583</Factor>  
</Convert>
```

```
<Convert>  
<From>EUR</From>  
<To>ESP</To>  
<Factor>166.386</Factor>  
</Convert>
```

```
<Convert>  
<From>EUR</From>  
<To>FRF</To>  
<Factor>6.55957</Factor>  
</Convert>
```

```
<Convert>  
<From>EUR</From>  
<To>IEP</To>  
<Factor>0.787564</Factor>  
</Convert>
```

```
<Convert>  
<From>EUR</From>  
<To>ITL</To>  
<Factor>1936.27</Factor>  
</Convert>
```

```
<Convert>  
<From>EUR</From>  
<To>LUF</To>  
<Factor>40.3399</Factor>  
</Convert>
```

```
<Convert>  
<From>EUR</From>  
<To>NLG</To>  
<Factor>2.20371</Factor>  
</Convert>
```

```
<Convert>  
<From>EUR</From>  
<To>ATS</To>  
<Factor>13.7603</Factor>  
</Convert>
```

```
<Convert>  
<From>EUR</From>  
<To>PTE</To>  
<Factor>200.482</Factor>  
</Convert>
```

```
<Convert>  
<From>EUR</From>  
<To>FIM</To>  
<Factor>5.94573</Factor>  
</Convert>
```

```
<Convert>  
<From>EUR</From>  
<To>GRD</To>  
<Factor>340.750</Factor>  
</Convert>  
</CurrencyConversion>
```

5. Run the script `getData.csh`.
6. Check the logs. The Error logs are kept in `/tmp` directory (for example, `CCLoadErr<date>_<time>.log`).

Shutting Down, Starting and Uninstalling BuyerXpert

This chapter provides instructions for shutting down, starting and uninstalling BuyerXpert.

The following sections are contained in this chapter:

- Shutting Down BuyerXpert
- Shutting Down Directory Server
- Shutting Down iPlanet Application Server
- Shutting Down iPlanet Web Server
- Starting iPlanet Web Server
- Starting iPlanet Application Server
- Starting Directory Server
- Starting BuyerXpert
- Uninstalling BuyerXpert

Shutting Down Procedures

Shutting Down BuyerXpert

```
% IAS-ROOT/ias/bin/KIVaes.sh stop
```

Shutting Down Directory Server

`% LDAP-ROOT/slaped-instance-name/stop-slaped`

Shutting Down iPlanet Application Server

`% IAS-ROOT/slaped-machine-name/stop-slaped`

`% IAS-ROOT/stop-admin`

Shutting Down iPlanet Web Server

`% IWS-ROOT/https-admserv/stop`

`% IWS-ROOT/https-machine-name.red.iplanet.com/stop`

Starting Procedures

Starting iPlanet Web Server

`% IWS-ROOT/https-admserv/start`

`% IWS-ROOT/https-machine-name.red.iplanet.com/start`

Starting iPlanet Application Server

`% IAS-ROOT/slaped-machine-name/start-slaped`

`% IAS-ROOT/start-admin`

Starting Directory Server

`% LDAP-ROOT/slaped-instance-name/start-slaped`

Starting BuyerXpert

```
% IAS-ROOT/ias/bin/KIVAes.sh start
```

Uninstalling BuyerXpert

1. Make sure iAS has stopped:

```
% KIVAes.sh stop
```

2. Use the uninstall program:

```
% IAS-ROOT/uninstall
```

3. At the prompt, select option 6.

Troubleshooting

This chapter describes operations you perform after you have installed BuyerXpert and offers troubleshooting tips you can try before you contact Technical Support.

I Can't Log In to Administrator.apm or Express.npm When Creating and Verifying PM Cluster

Try restarting iWS.

I Cannot Add to the Cart with Sample Data

Make sure the initXXX.ora (where XXX is the ORACLE_SID) file has open_cursors set to a value greater than 100.

When Trying to Restart iWS Instance from Web Server Admin, the Following Error Displayed:

```
[https-hostname]: start failed (2: unknown early startup error)
```

```
[https-hostname]: failure: watchdog could not connect to  
notification port ( Connection refused )
```

Remove the file named wdnotify under https-web-server/logs.

I Get a Login Error When Trying to Log in Using the Sample Data

Try removing the LDAP server that was created for membership and recreate a new one. Then, run the following two scripts:

1. Create LDAP schema:

```
IAS_HOME/shared/bin/ldapmodify -h hostname -p LDAP_port_number -c -a  
-D irectory_user -w directory_user_password -f  
IAS_HOME/buyer/sample_data/directory_ldif/buyer/iplanet/schema.ldif
```

For example:

```
/export/IAS60/shared/bin/ldapmodify -h colonial -p 20000 -c -a -D  
"cn=Directory Manager" -w adminadmin -f  
(/export/IAS60/sample_data/directory_ldif/buyer/iplanet/schema.ldif)
```

2. Import LDAP data:

```
IAS_HOME/shared/bin/ldapmodify -h hostname -p LDAP_port_number -c -a  
-D directory_user -w directory_user_password -f  
IAS_HOME/buyer/sample_data/directory_ldif/buyer/iplanet/BuyerXpertS  
ample.ldif
```

where:

IAS_HOME is the location where IAS is installed

hostname is the machine name

LDAP_port_number the port number when creating the LDAP instance

directory user is the name you used to the directory server. For the case of sample data, the directory user is cn=Directory Manager

directory user password the password for the directory user

For example:

```
/export/IAS60/shared/bin/ldapmodify -h colonial -p 20000 -c -a -D  
"cn=Directory Manager" -w adminadmin -f  
(/export/IAS60/sample_data/directory_ldif/buyer/iplanet/BuyerXpertSa  
mple.ldif)
```

I Cannot See the Sample Catalog After Installation

- Make sure you have InterMedia Text installed in Oracle.
- Be sure that you have enabled the catalog using the Catalog Manager.

If neither of the above works, you need to re-populate the database by running the `create_schema.sh` and `import_data.sh` scripts as follows:

1. Verify that the iPlanet Application Server is running.
2. Run the `create_schema.sh` script.

This script creates the user accounts and all the tables/indexes in the user accounts, then loads the seed data for the whole application, including sample catalog.

```
IAS_HOME/ias/bin/KIVAes.sh stop
```

```
IAS_HOME/buyer/sample_data/impexp_file/create_schema.sh -r  
IAS_HOME -u user_name/password -s system user/password -d ORACLE_SID -o  
ORACLE_HOME -t DATA_TABLE_SPACE -i INDEX_TABLE_SPACE
```

where:

IAS_HOME is the location where IAS is installed

user_name is the user to be created in oracle

password is the user password created in Oracle

Example

```
/export/IAS60/buyer/sample_data/impexp_files/create_shcema.sh -r  
/export/IAS60 -u bx/bx -s system/manager -d BXM3 -o  
/export/oracle816 -t TS01 -i TS02
```

3. Run the `import_data.sh` script.

This script imports the sample policy book and all the importable sample data for the application. The data includes:

- Policy book
- Unit Sample data
- Sample Price Lists
- Sample Adjustment templates
- Shipment Method and Freight Term sample data

- Sample Policy instances
- Office Furniture catalog for Staples, Inc.

IAS_HOME/ias/bin/KIVAes.sh start

IAS_HOME/buyer/sample_data/impexp_files/import_data.sh -s -r
IAS_HOME -u *URL* -n *login name* -p *password* -o *organization_name*

where:

IAS_HOME is the location where the iPlanet Application Server is installed

URL is where BuyerXpert is running

login name is the user login name of the Admin interface

password is the user password

organization_name is the user organization name

Example

```
/export/IAS60/buyer/sample_data/impexp_files/import_data.sh -s -r
/export/IAS60 -u http://colonial.red.iplanet.com:8080 -n admin -p
admin -o mercury.com
```

Workflow deployment failed; descriptor failed an internal sanity check.

This failure of workflow deployment is associated with the Process Manager. If it occurs during deployment, you need to remove the `bx40_mercu_data` table from the cluster (for example, Process Manager) Oracle user, and import the workflow again.

```
SQL> select table_name from all_tables;
```

```
TABLE_NAME
```

```
-----
```

```
DUAL
```

```
SYSTEM_PRIVILEGE_MAP
```

```
STMT_AUDIT_OPTION_MAP
```

```
AUDIT_ACTIONS
```

```
PSTUBTBL
```

```
AURORA$IIOF$SYSTEM$PROPERTIES
```

```
MD$DICTVER
OGIS_SPATIAL_REFERENCE_SYSTEMS
CS_SRS
HELP
```

```
TABLE_NAME
-----
```

```
BX40_KLMNL_DATA
BX40_MERCU_DATA
DYNAMIC_GROUP
HISTORY
KLMNL_SP2_DATA
KLMNL_SP3
PROCESS_INSTANCE
WF_BLOBS
WF_ID_RANGE
WORK_ITEM
```

```
21 rows selected.
```

```
SQL> drop table bx40_mercu_data;
```

```
Table dropped.
```

```
SQL> commit;
```


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