

Installation Guide

SellerXpert 4.1

August 2001

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CETTE DOCUMENTATION EST FOURNIE “EN L'ÉTAT”, ET TOUTES CONDITIONS EXPRESSES OU IMPLICITES, TOUTES REPRÉSENTATIONS ET TOUTES GARANTIES, Y COMPRIS TOUTE GARANTIE IMPLICITE D'APTITUDE À LA VENTE, OU À UN BUT PARTICULIER OU DE NON CONTREFAÇON SONT EXCLUES, EXCEPTÉ DANS LA MESURE OÙ DE TELLES EXCLUSIONS SERAIENT CONTRAIRES À LA LOI.

Contents

| | |
|---|-----------|
| About This Document | 7 |
| Audience | 7 |
| What's in This Document | 8 |
| Documentation Conventions | 8 |
| The Document Online | 9 |
| How to Use the Online Help | 9 |
| Related Documentation | 9 |
| Product Support | 10 |
| | |
| Chapter 1 Planning to Install SellerXpert | 11 |
| Assumptions About the Site Installer | 11 |
| Installation Checklist | 12 |
| Requirements | 12 |
| Hardware Requirements | 13 |
| System Requirements | 13 |
| Software Requirements | 14 |
| Completing the Installation Worksheet | 15 |
| Installation Roadmap | 16 |
| | |
| Chapter 2 Installing Oracle Database | 19 |
| Hardware Requirements | 19 |
| Installing Oracle | 20 |
| Create an Oracle Instance | 30 |
| | |
| Chapter 3 Installing iPlanet Servers Software | 51 |
| What You Should Know About the iPlanet Application Server | 51 |
| Application Server Components | 52 |
| Installing iPlanet Web Server (iWS) | 52 |
| Installing Actuate | 60 |
| Installing iPlanet Application Server (iAS) | 61 |

| | |
|---|------------|
| Reloading Configuration Files | 75 |
| Checking iAS Installation | 78 |
| Enabling the Database with iAS | 79 |
| Creating an iPlanet Directory Server (LDAP) Instance | 87 |
| | |
| Chapter 4 Installing SellerXpert | 91 |
| Preparing to Unload the Distribution Media | 91 |
| SellerXpert CD-ROM Contents | 92 |
| Verifying the Database and Server Installations | 92 |
| Information About Sample Data | 92 |
| Sample Data in Directory Server | 93 |
| Sample Data in Oracle | 93 |
| Installing SellerXpert Software | 93 |
| Configuring Actuate for SellerXpert | 104 |
| Creating Catalogs in Catalog Manager | 106 |
| Creating Membership Indexes | 116 |
| Set the Look-through Limit to Unlimited | 123 |
| Preparing the Seed Data Storage | 127 |
| Preparing the Directory Server Data Storage | 127 |
| Preparing the Oracle Data Storage | 129 |
| Loading the Application Seed Data | 130 |
| Configuring SellerXpert for Secure Transfer of Sensitive Data | 132 |
| Preparation | 132 |
| Configuring | 132 |
| | |
| Chapter 5 Installing Additional Software | 135 |
| Installing ECXpert | 135 |
| Deploying the Portal Channel | 135 |
| Deploying the Authentication Modules | 136 |
| Deploying the Channels | 137 |
| Adding the Channels to the Available Channels List | 139 |
| Configuring the Portal Server | 139 |
| Adding the Channels to the User Profile | 140 |
| Anonymous Logon to Portal and Enabling SellerXpert Channel to Anonymous Portal Users .. | 140 |
| Configuring Portal Server URLs for SellerXpert | 141 |
| Miscellaneous Tips | 141 |
| Installing Reuters™ Multi-Currency Live Feed | 142 |
| HTML Format | 142 |
| XML Format | 143 |
| Before Installing | 143 |
| Installation of Multi-Currency Live Feed | 143 |

| | |
|---|------------|
| Chapter 6 Shutting Down, Starting and Uninstalling SellerXpert | 149 |
| Shutting Down Procedures | 149 |
| Shutting Down SellerXpert | 149 |
| Shutting Down Directory Server | 150 |
| Shutting Down iPlanet Application Server | 150 |
| Shutting Down iPlanet Web Server | 150 |
| Starting Procedures | 150 |
| Starting iPlanet Web Server | 150 |
| Starting iPlanet Application Server | 150 |
| Starting Directory Server | 150 |
| Starting SellerXpert | 151 |
| Uninstalling SellerXpert | 151 |
| | |
| Glossary | 153 |
| | |
| Index | 161 |

About This Document

The *SellerXpert 4.1 Installation Guide* provides information on how to install SellerXpert 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 SellerXpert installer.

A SellerXpert 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
- 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 SellerXpert | Chapter 1, “Planning to Install SellerXpert” |
| 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 SellerXpert | Chapter 4, “Installing SellerXpert” |
| Instructions for installing ECXpert, iPlanet portal, and multi-currency live feed | Chapter 5, “Installing Additional Software” |
| Starting up, shutting down and uninstalling SellerXpert procedures | Chapter 6, “Shutting Down, Starting and Uninstalling SellerXpert” |
| SellerXpert terminology | “Glossary” |

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 this document 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 SellerXpert, you can click Help in any window to open a page that either explains the fields and components of that window or displays a listing of help topics.

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 SellerXpert documentation set includes:

- *Release Notes*—Contains important information on the current release of SellerXpert. Read this document before working with the new SellerXpert release.
- *Concepts*—Describes the over-all functionality of SellerXpert. Read this document if you are unfamiliar with SellerXpert.
- *Installation Guide*—Provides instructions for installing the SellerXpert product and its enabling software.
- *Administrator's Guide*—Provides reference information and instructions on administering a fully-installed SellerXpert system.
- Admin interface Help—Provides guidelines and instructions for using the graphical administrative interface to administer SellerXpert.
- User interface Help—Provides guidelines and instructions for performing the procurement tasks of SellerXpert.
- Catalog interface Help—Provides guidelines and instructions for managing catalogs.

The following documentation contains additional information relevant to using this SellerXpert 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 SellerXpert 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 SellerXpert

This chapter describes planning and tasks you must perform before you can install SellerXpert 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 SellerXpert.
- 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 SellerXpert 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 SellerXpert 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 SellerXpert 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) 2 GB RAM (recommended) | <code>prtconf grep memory</code> |
| Swap Space | 2x memory (minimum) 3x memory (recommended) | <code>swap -s</code> |
| Disk Space | 9 GB for installation | <code>df -k /directoryName</code> |

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

Software Requirements

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

Table 1-3 Software Requirements

| Software | Included (Embedded or Bundled) with the SellerXpert 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) |
| Netscape Communicator Version 4.7 or higher (or Microsoft Internet Explorer Version 5.0 or higher) | No No |
| Oracle Client 8.1.6 (if SellerXpert 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.

NOTE It is recommended that you install and use ECXpert 3.5 with SellerXpert.

Completing the Installation Worksheet

Record your specific settings in the installation worksheet before you install SellerXpert. While in some cases you can use default configuration values provided by the SellerXpert 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 SellerXpert 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 SellerXpert and iAS as the same user. Do not install SellerXpert and iAS as `root`.

Table 1-4 Installation Worksheet

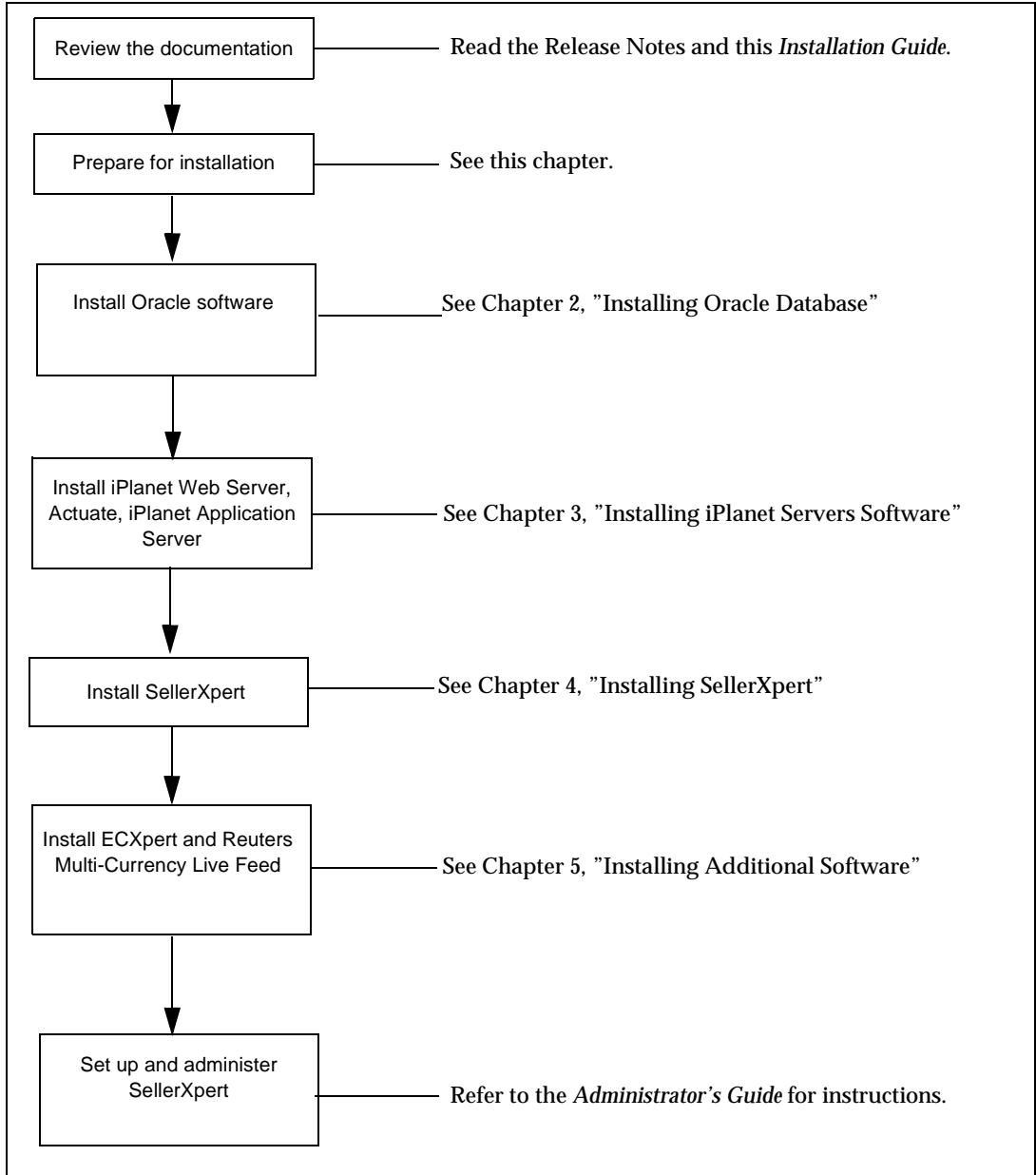
| Configuration Value | Example Given | Your Setting |
|-----------------------------------|---------------|--------------|
| Oracle user name | oracle8 | |
| Oracle SID/path | SXpert | |
| Oracle group | dba | |
| Oracle database name | SXpert | |
| Global database name | SX | |
| System user name | seller | |
| 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 | |

Table 1-4 Installation Worksheet (*Continued*)

| Configuration Value | Example Given | Your Setting |
|--|---------------|--------------|
| Netscape configuration directory server administrator ID | admin | |
| LDAP instance port | 20000 | |

Installation Roadmap

This roadmap lists the tasks you must complete in order to successfully install and configure SellerXpert. 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 SellerXpert.

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.

The following sections are contained in this chapter:

- Hardware Requirements
- Installing Oracle
- Create an Oracle Instance

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:

| | |
|--------------|-----------------|
| 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 SXpert
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 +
```

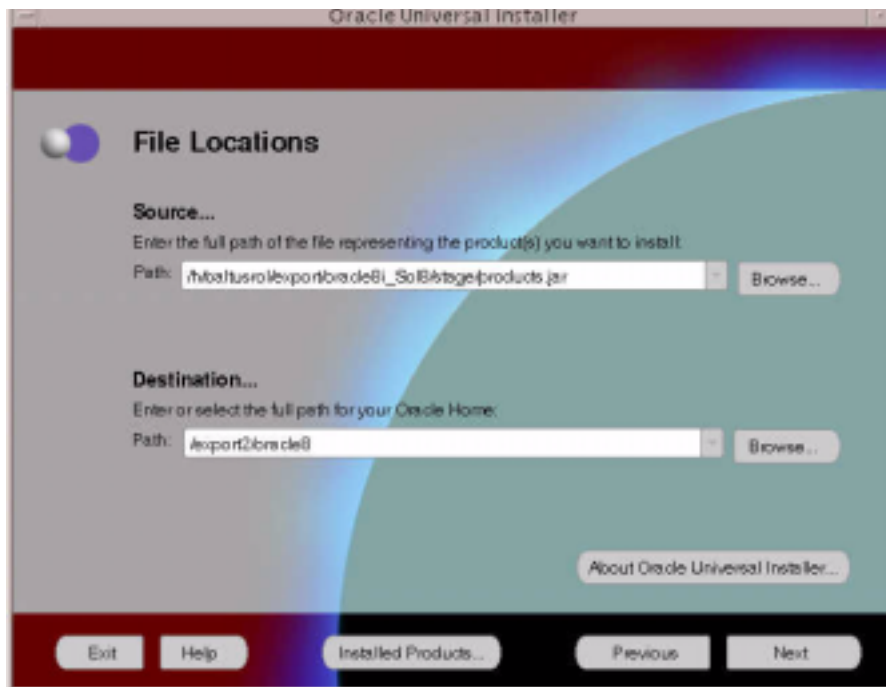
This will allow the database installation to display on your screen.

14. From the Oracle CD, type:

```
./runInstaller
```

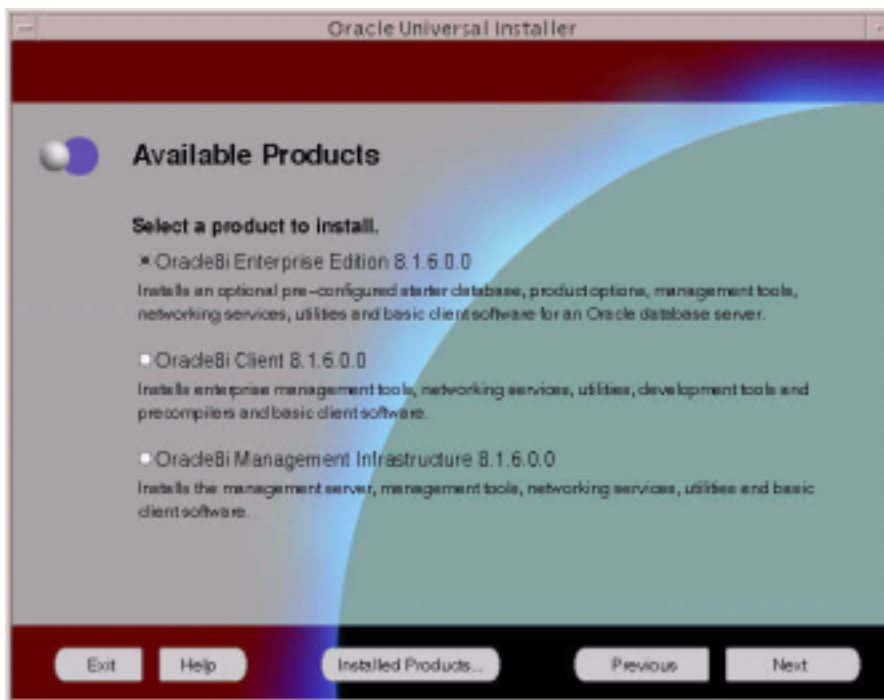
15. When the welcome screen displays, click Next.

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.

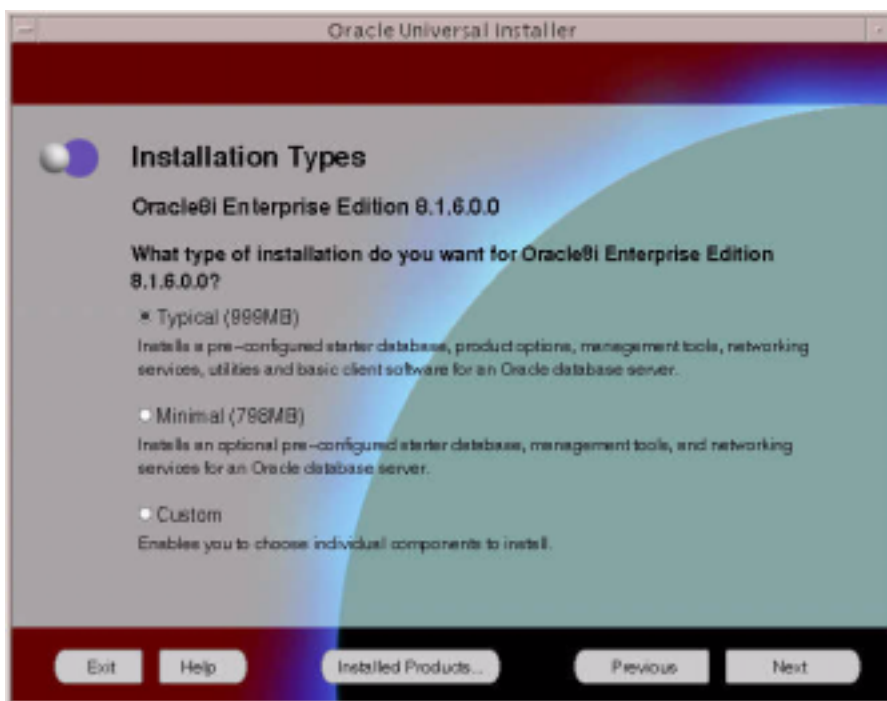


17. The Unix Group Name screen displays. Enter the name of the Unix group you created earlier for Oracle (dba). Click Next.

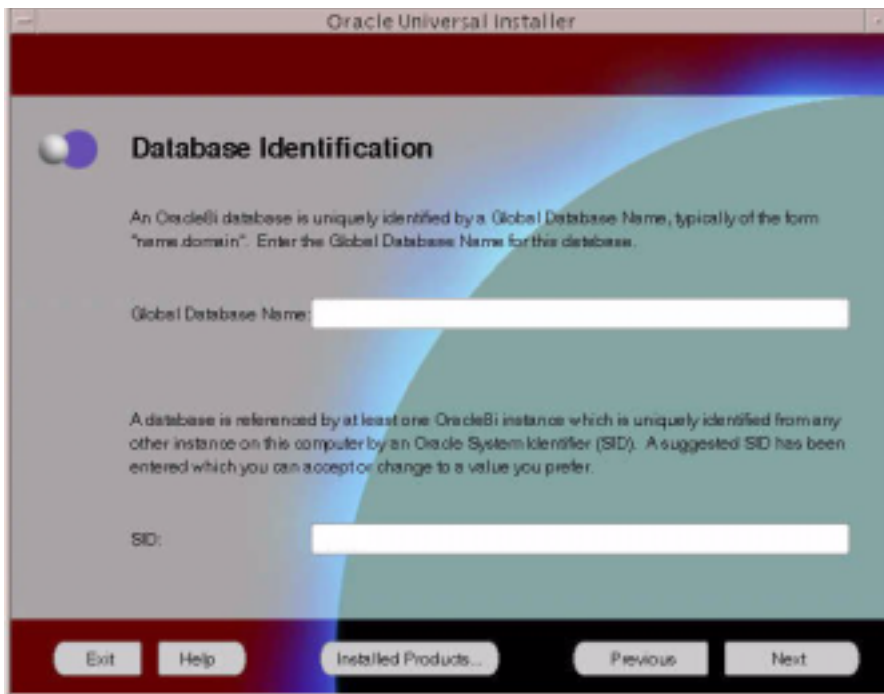
18. The Available Products screen displays. Choose Oracle8i Enterprise Edition 8.1.6.0.0 and click Next.



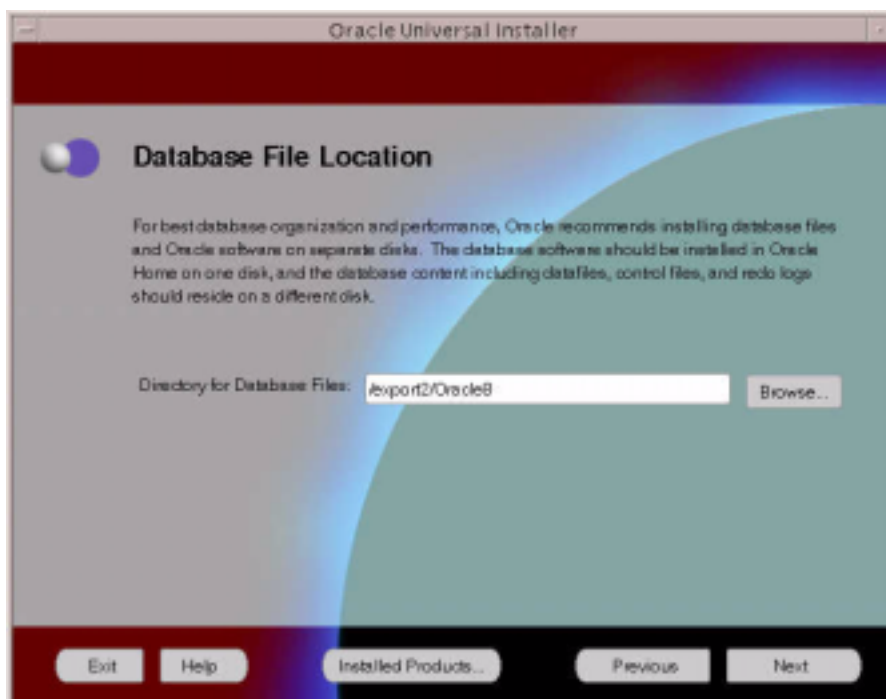
19. The Installation Types screen displays. Select the Typical install to get a basic set of Oracle software installed and click Next.



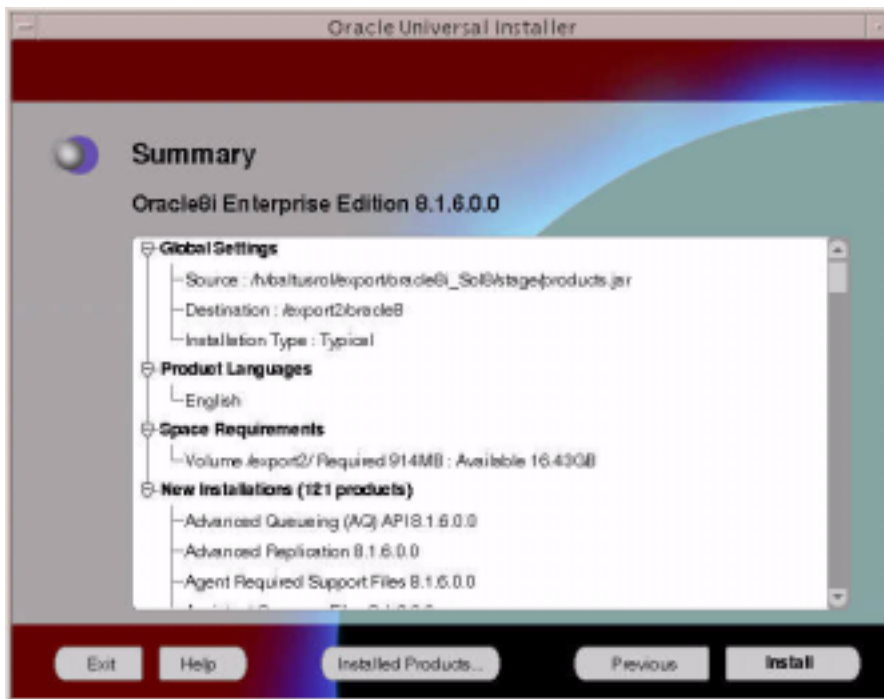
20. The Database Identification screen displays. Enter the ORACLE_SID you are creating for both the Global Database Name and SID and click Next.



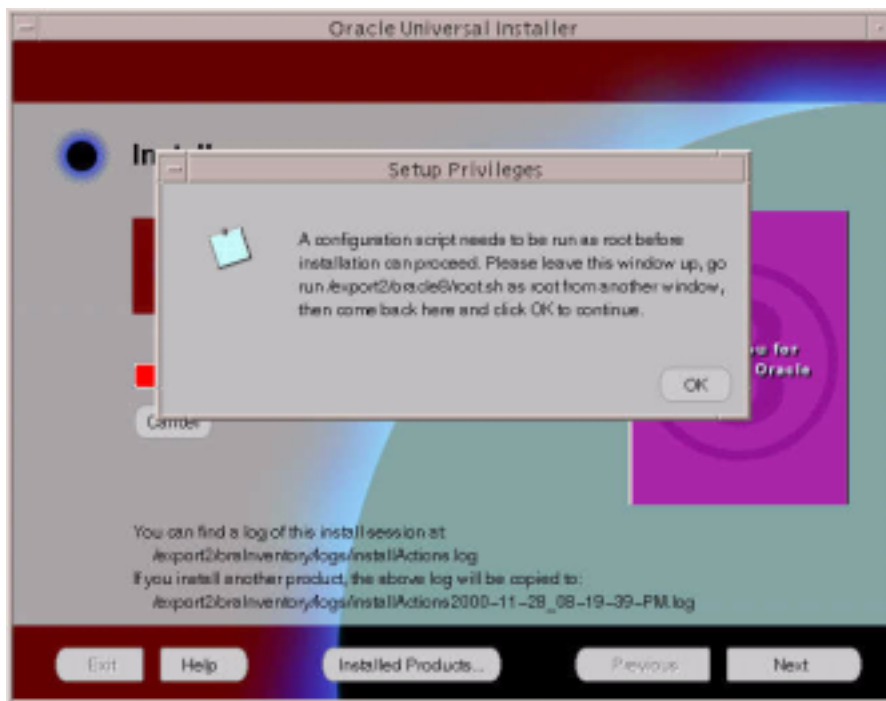
21. The Database File Location screen displays. Enter the directory you have created earlier to install Oracle and click Next.



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.

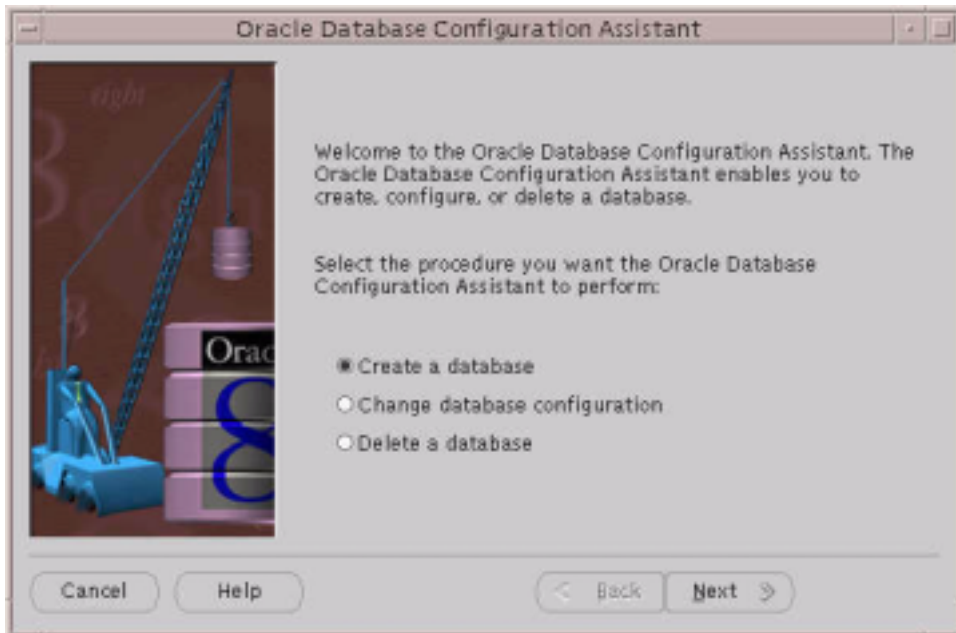


24. After executing the script, click OK, and then click Next.
25. When Oracle installation has completed, a screen displays the database information. Verify that information and click OK.
26. This is the end of Oracle Installation. Click Exit.
27. During the installation, a default database instance 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 SellerXpert'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.

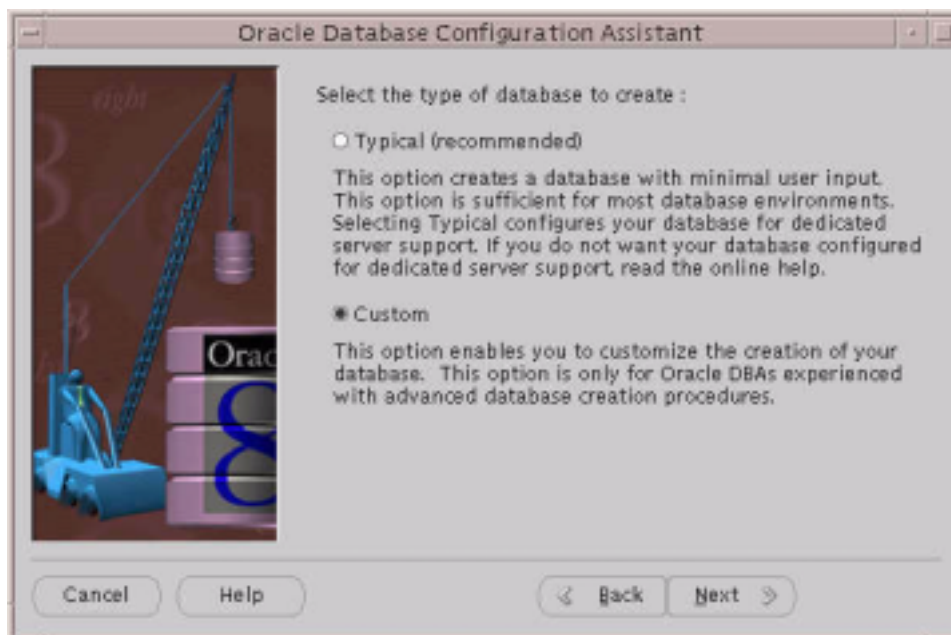
Create an Oracle Instance

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

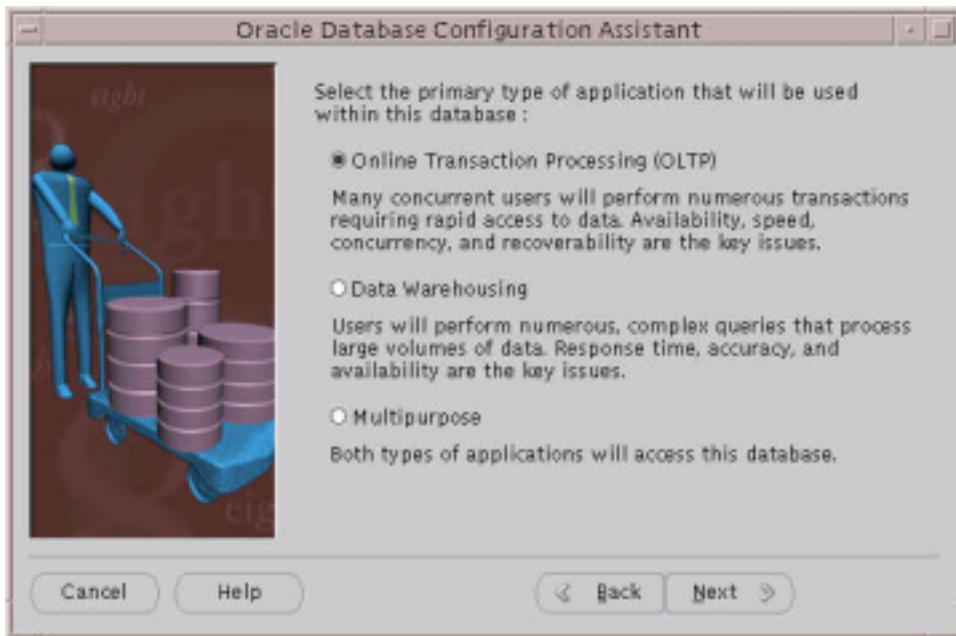
1. You now need to create an Oracle instance that is configured to SellerXpert's specification. Execute dbassist from <ORACLE_HOME>/bin directory and select create a database. Click Next.



2. To configure to SellerXpert'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.

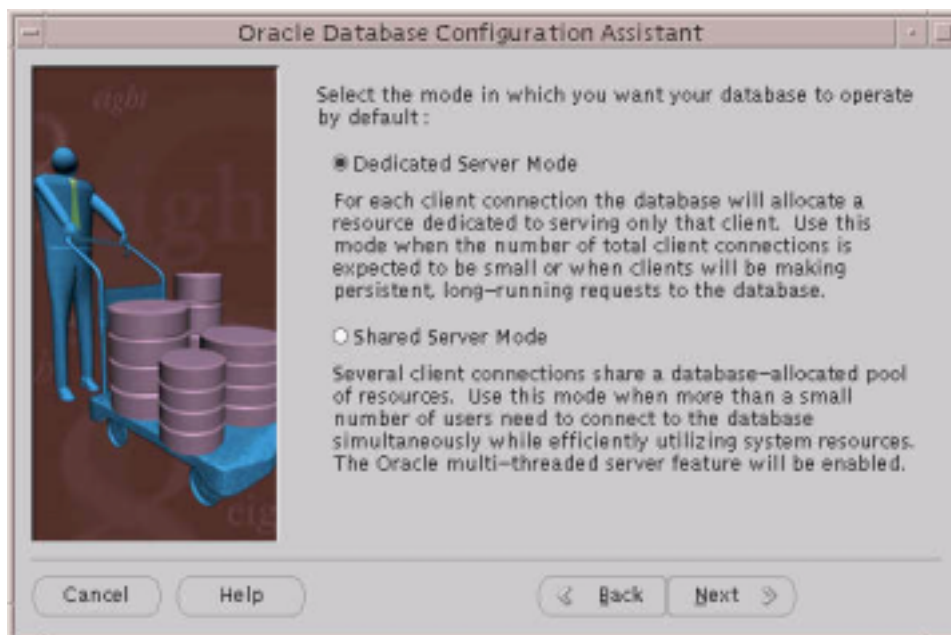


4. When the next screen displays, enter the approximate number of users to be concurrently (simultaneously) connected to the database at any given time. Oracle Database Configuration Assistant uses this value and the information you provided about your database environment on the previous screen to set 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 SellerXpert, you need at least 20 users. Click Next.

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



6. Click the following check boxes and click Next:

Oracle Time Series

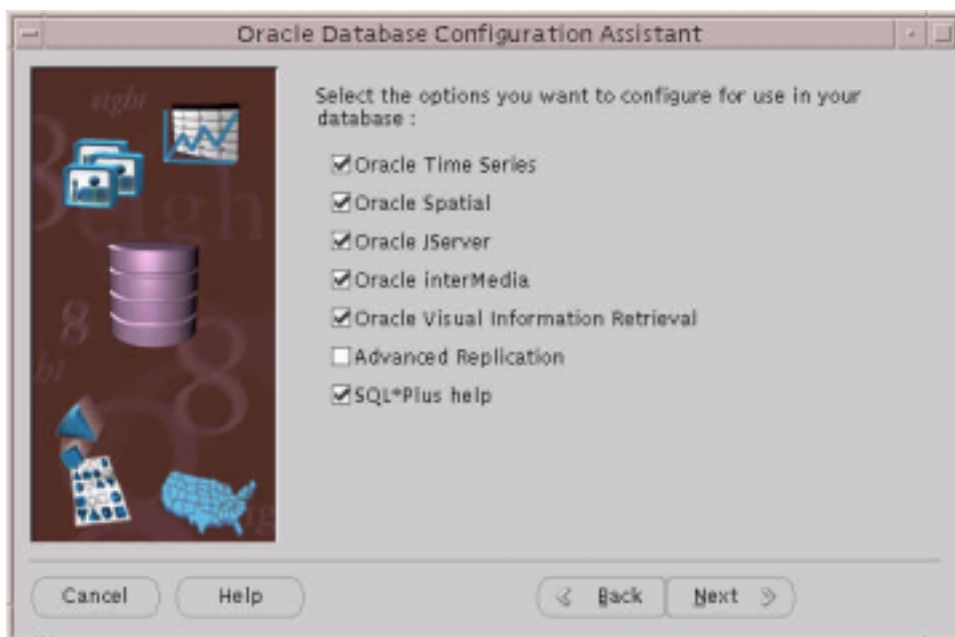
Oracle Spatial

Oracle JServer

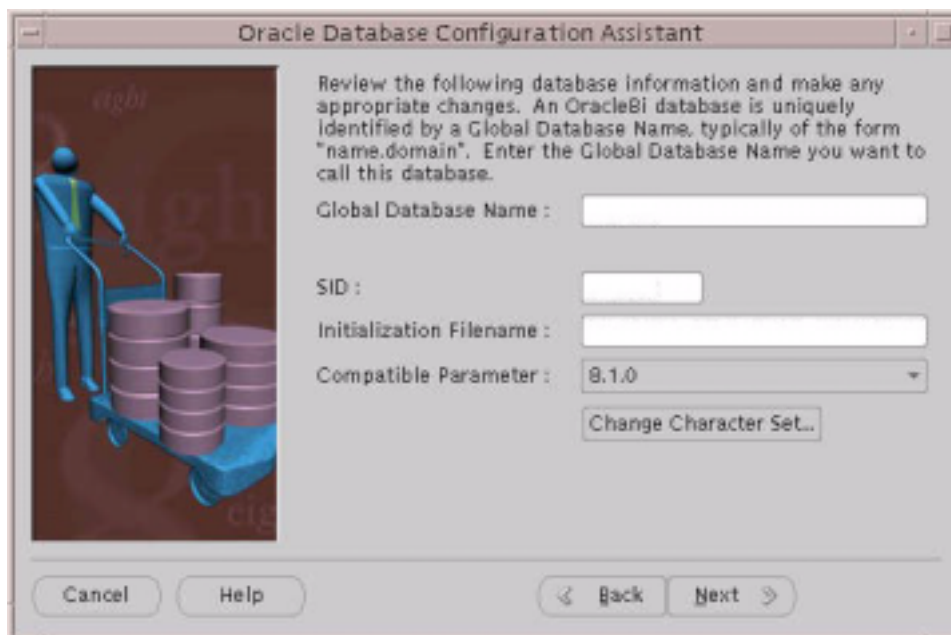
Oracle InterMedia

Oracle Visual Information Retrieval

SQL*Plus help

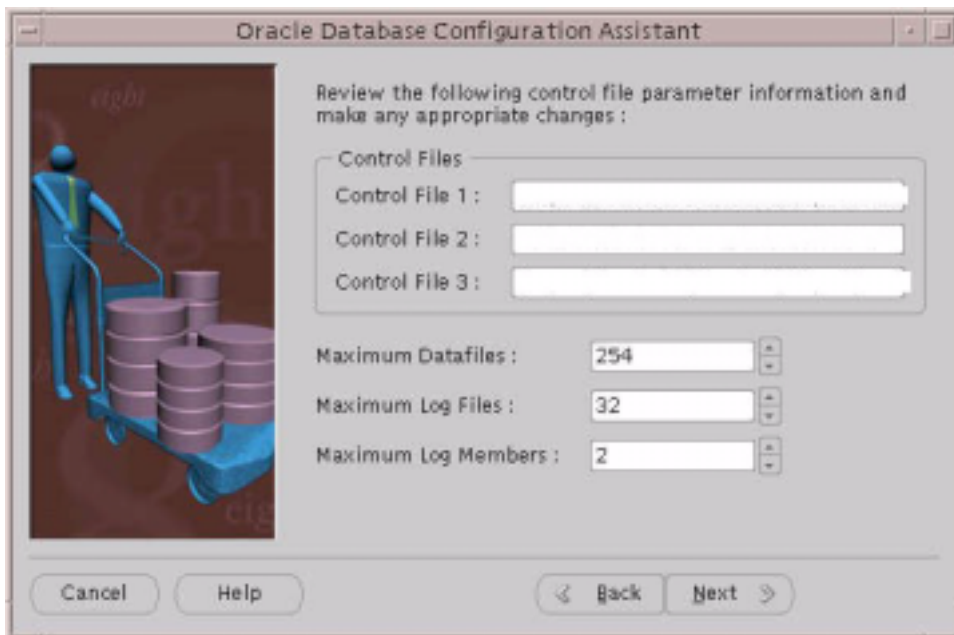


7. Enter the database name and SID. If your NLS_LANG is set to UTF-8, then the character set is UTF-8. If you like to change it, click Change Character Set... and make sure that the environment NLS_LANG is set to the character set that you selected. Click Next.



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

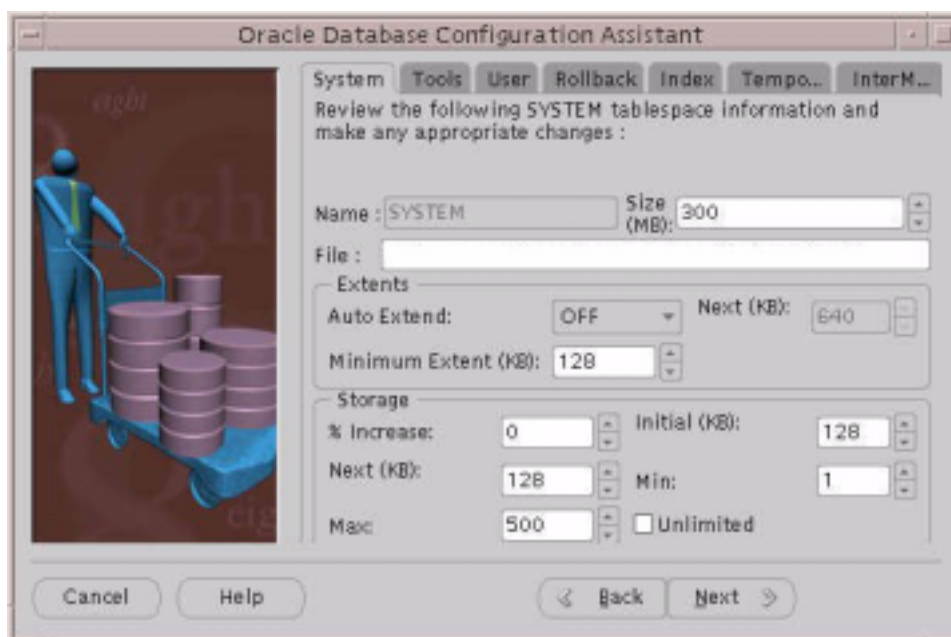
Initial (KB): 128

Next (KB): 128

Min: 1

Max: 500

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



10. 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

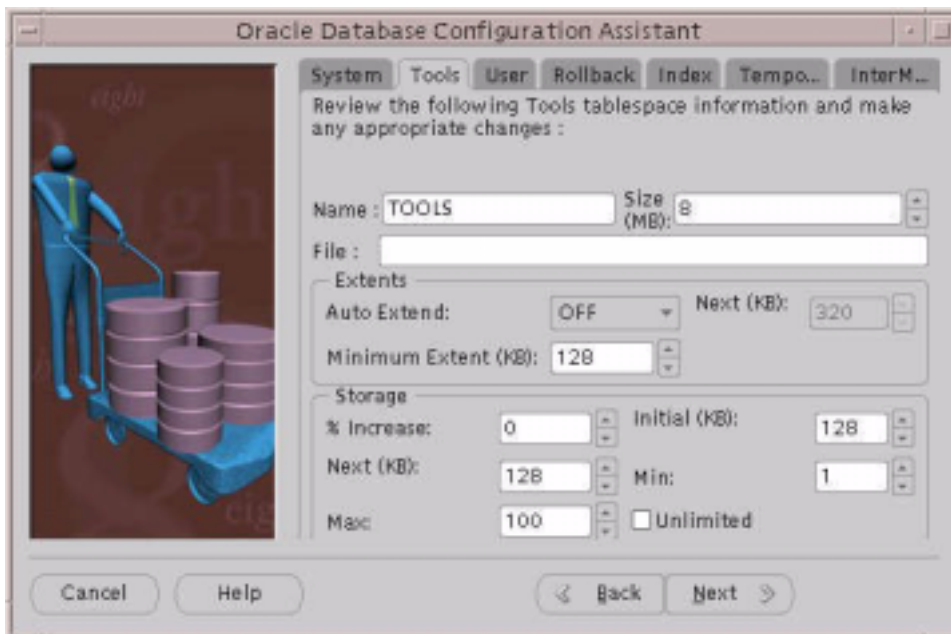
Initial (KB): 128

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

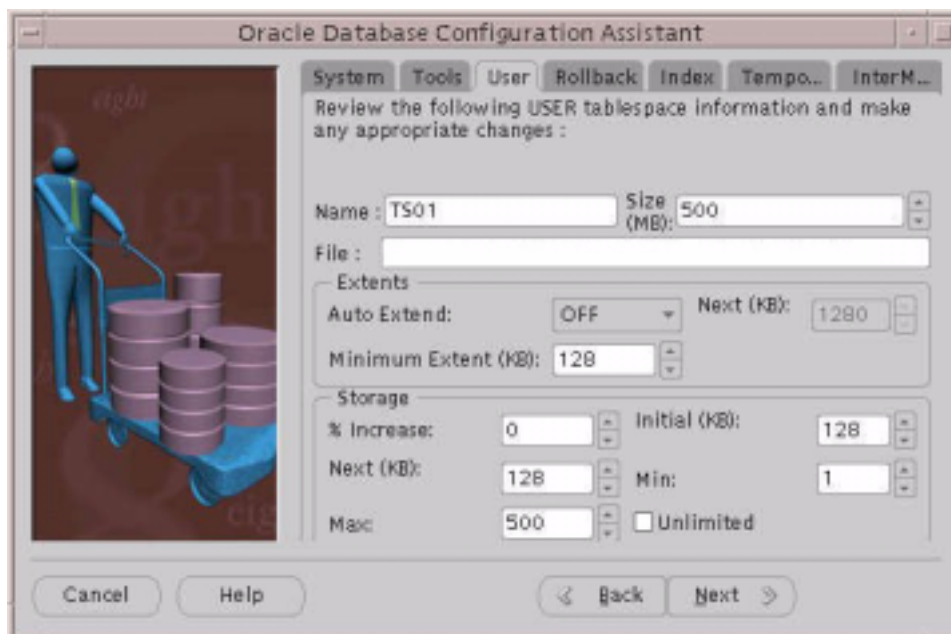
Initial (KB): 128

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

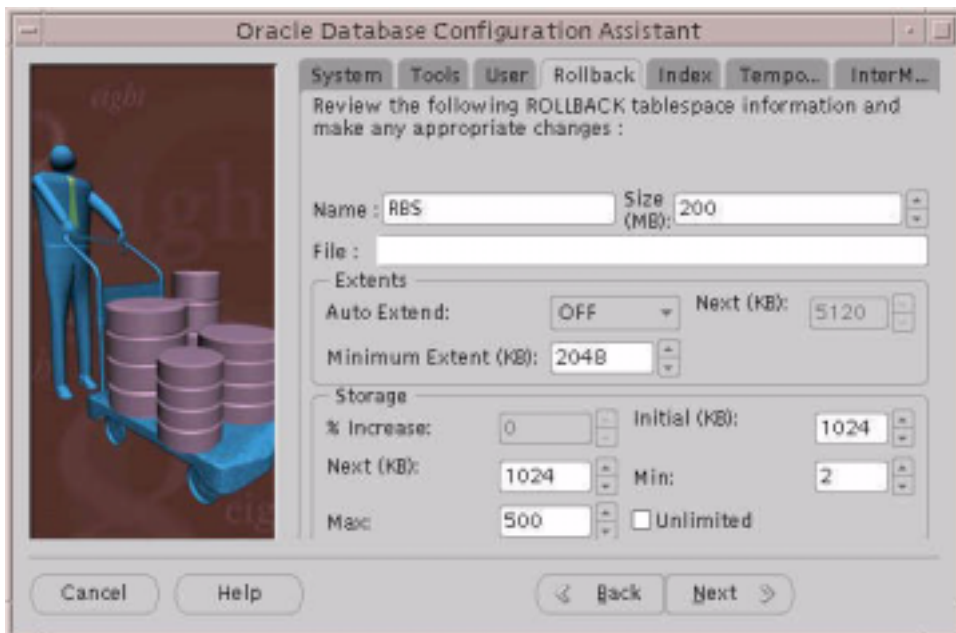
Initial (KB): 1024

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

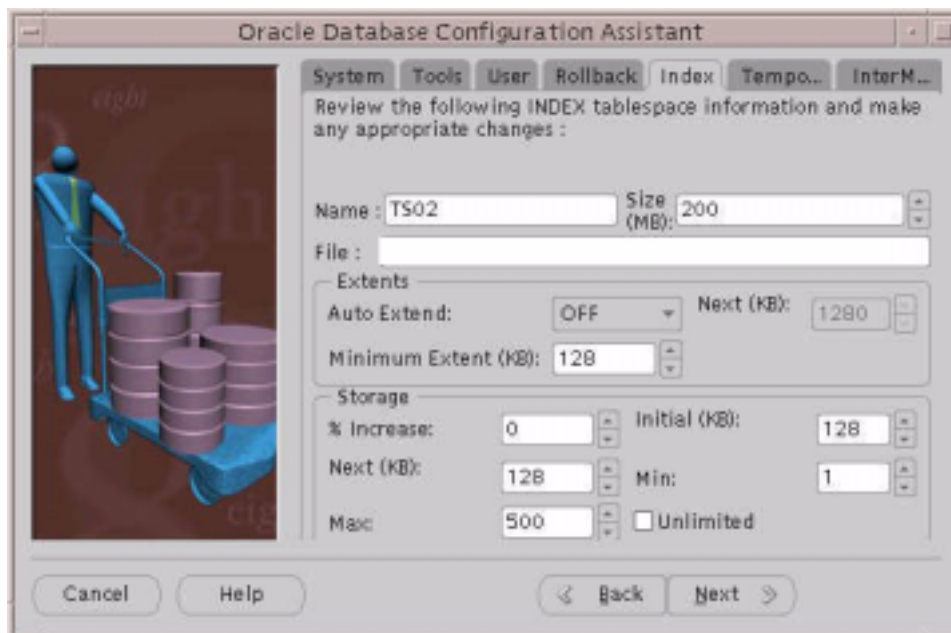
Initial (KB): 128

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

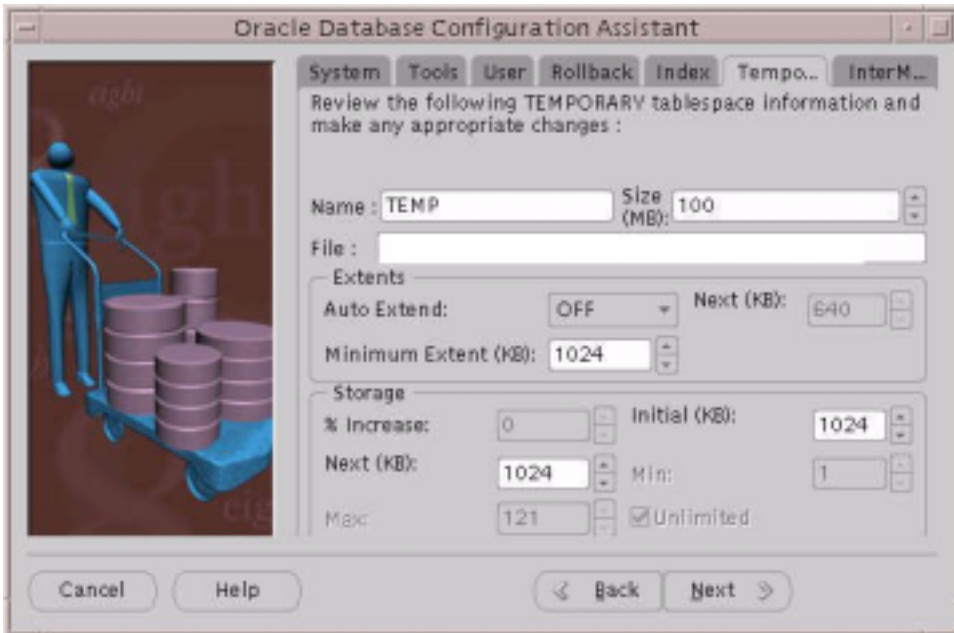
Auto Extend: OFF

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

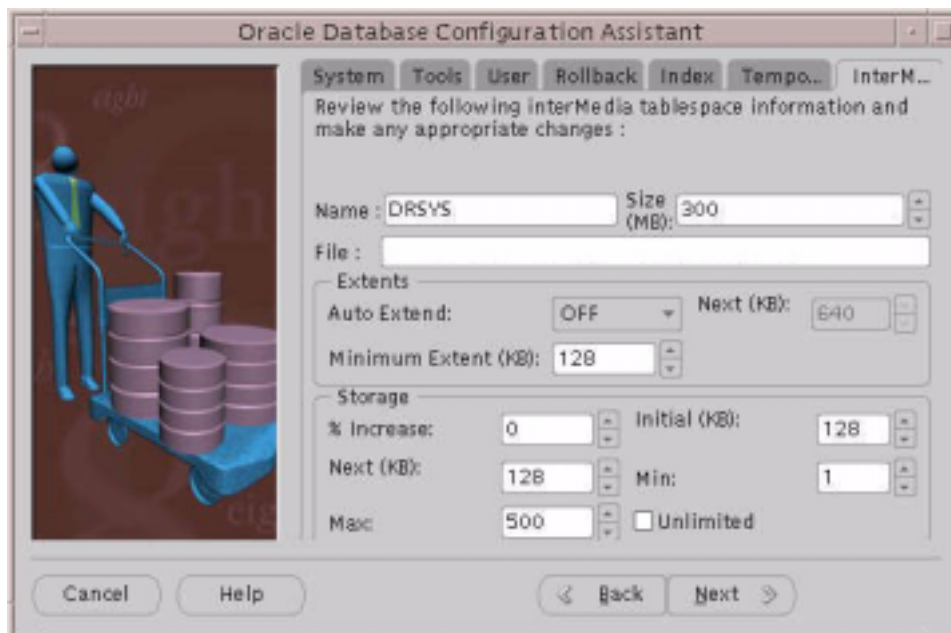
Initial (KB): 128

Next (KB): 128

Min: 1

Max: 500

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

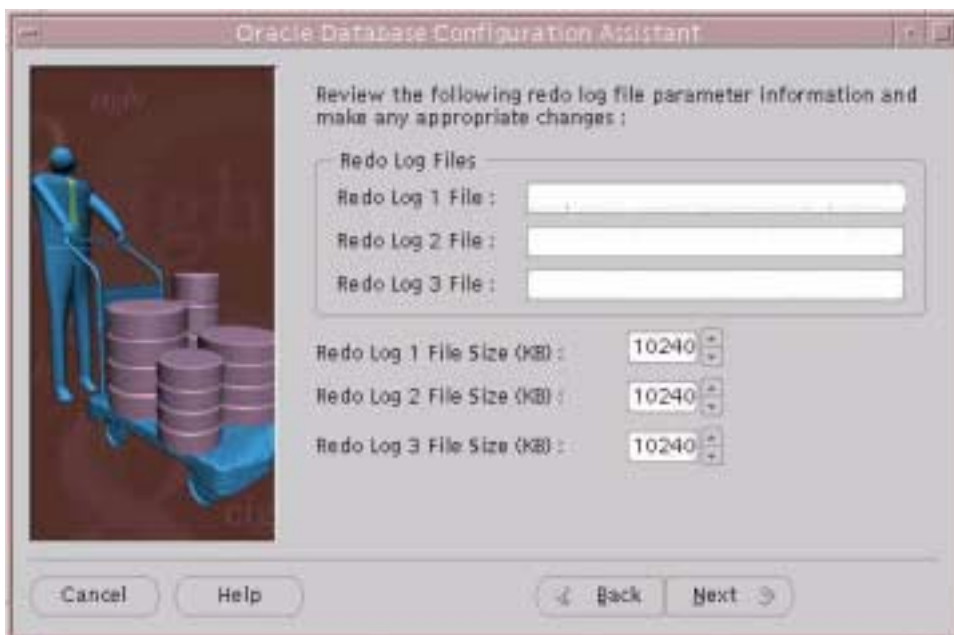


16. Enter the redo log file location and the file size. The recommended file sizes are:

Redo Log 1 File Size (KB): 10240

Redo Log 2 File Size (KB) 10240

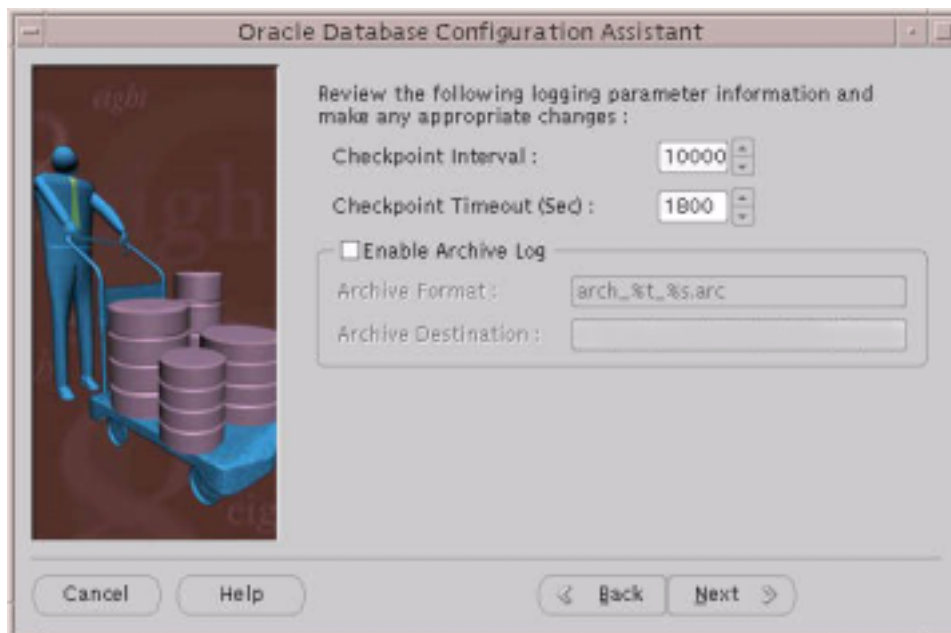
Redo Log 3 File Size (KB): 10240



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

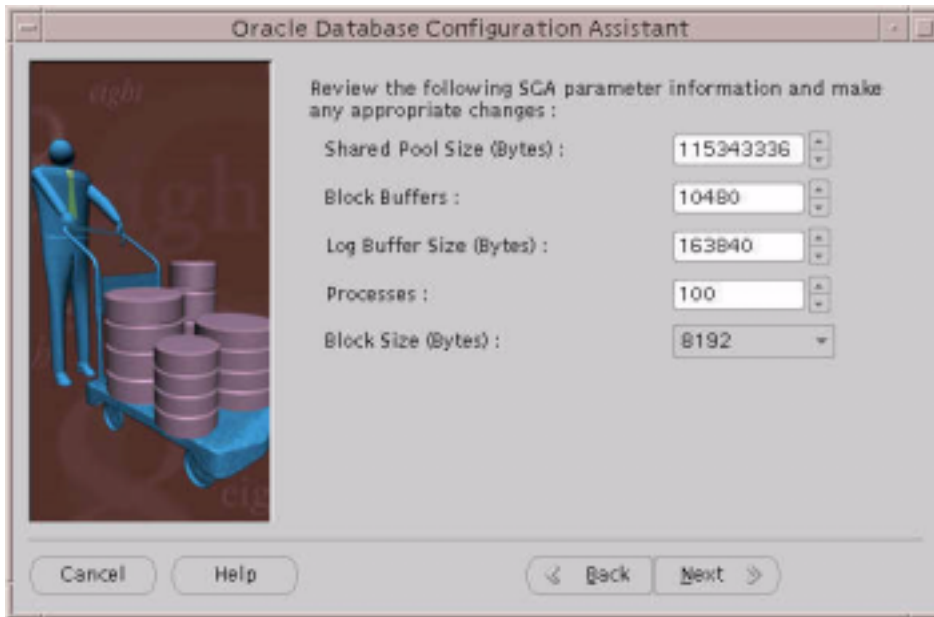
Processes: 100

Block Size (Bytes): 8192

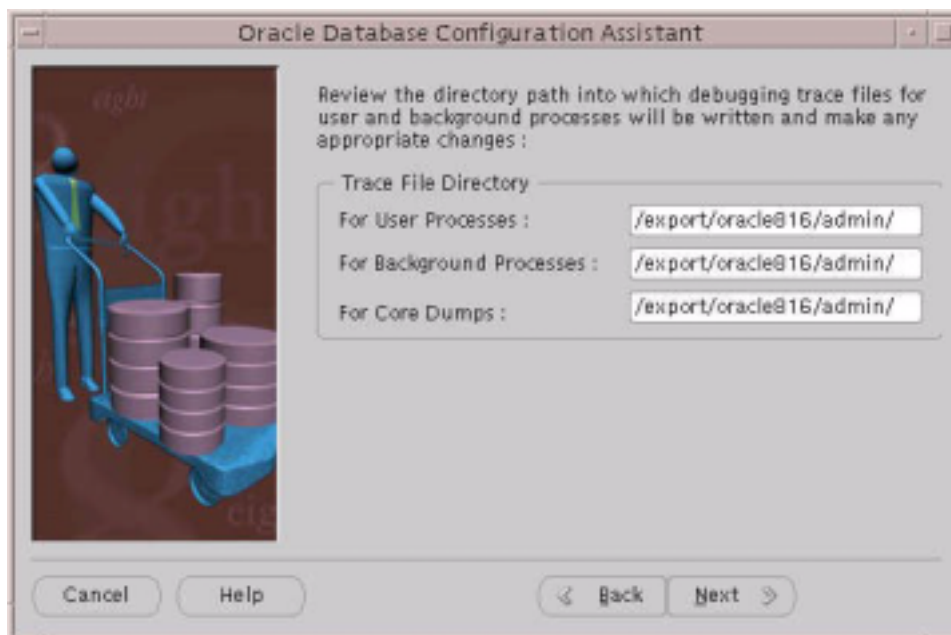
(block size is very important - make sure you have at least 8192 bytes)

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.

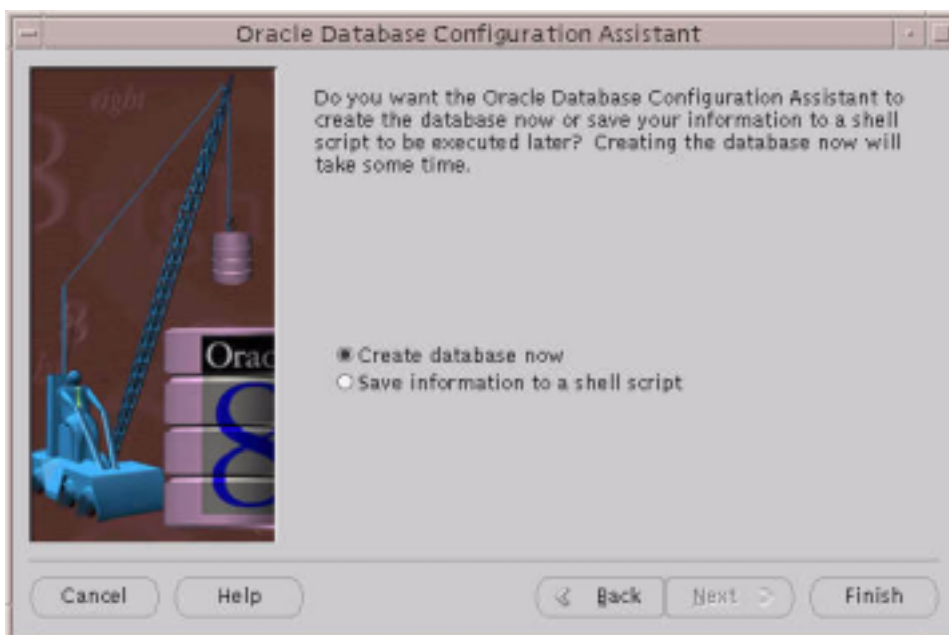
The default values that appear here for the SHARED_POOL_SIZE, DB_BLOCK_BUFFERS, DB_BLOCK_SIZE, and PROCESSES parameters are based on the number of concurrent users and database environment type (OLTP, DSS, or Hybrid) that you selected on previous screens.



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 SellerXpert.

NOTE This is information as it pertains to installing and operating SellerXpert 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)

When you follow these procedures to install the servers software, you will be able to install SellerXpert with sample data.

What You Should Know About the iPlanet Application Server

The iPlanet Application Server (iAS) is the primary engine of SellerXpert. 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.

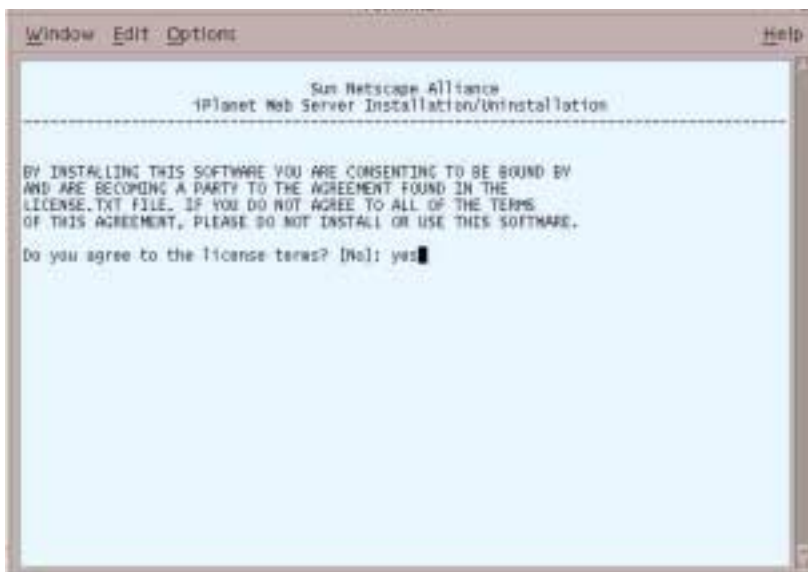
To install iWS:

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

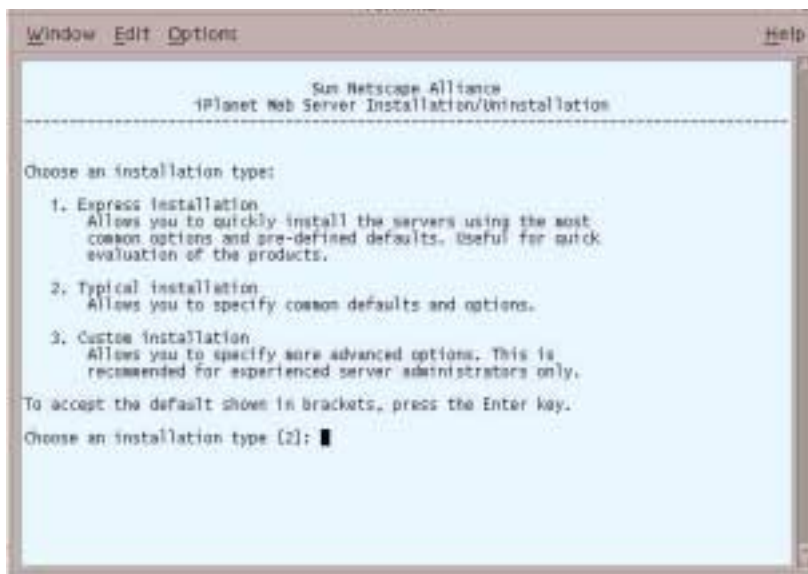
```
# gzcat IWS_tar_file.tar.gz|tar xvf -  
# ./setup
```

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

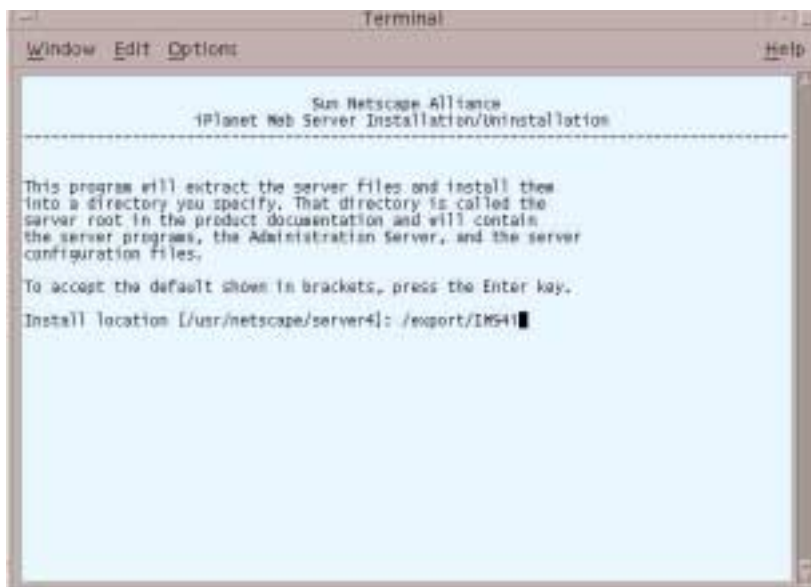
3. The Licensing Agreement screen displays. Type **yes** to continue.



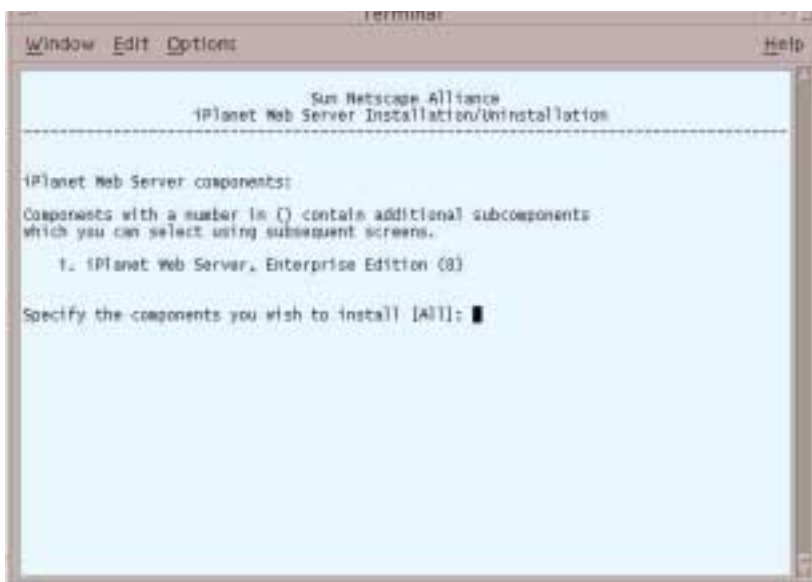
4. The Installation Type screen displays. Press **Enter** to accept a typical install.



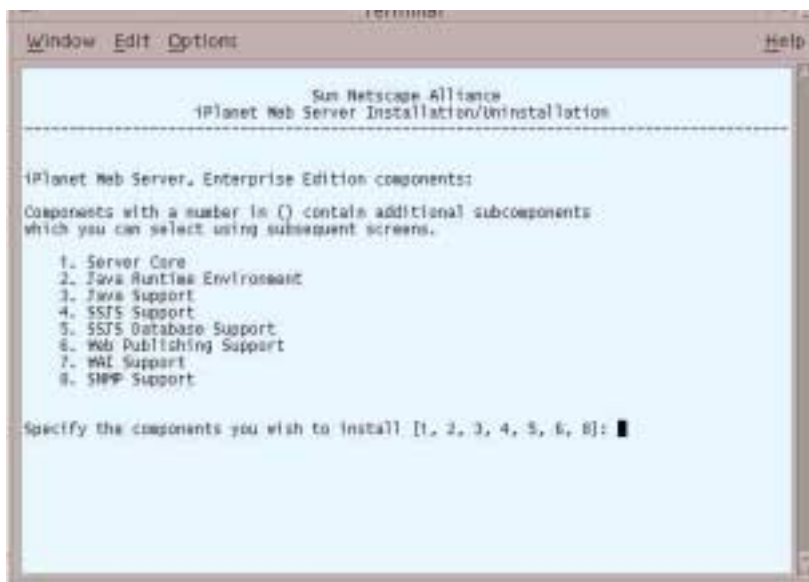
5. The Extracting Server Files screen displays. Type the location where you want to install iWS. The installer will create this directory.



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.



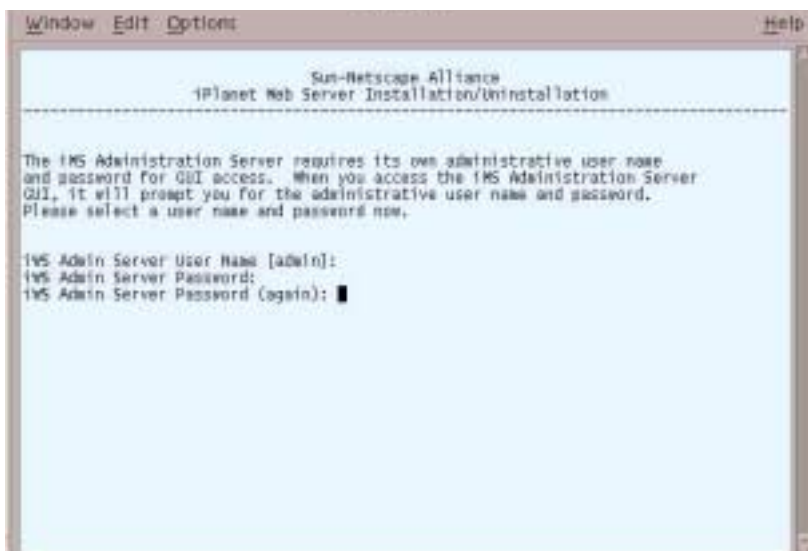
9. The Choosing a Unix User and Group screens display. The default should be chosen only if you want iWS to use the displayed Unix user and group to run iWS. Press Enter to accept the default or enter a Unix user and group.



10. The iWS Administration Server User Name screen displays. Press Enter to accept the default, or enter a new iWS username.



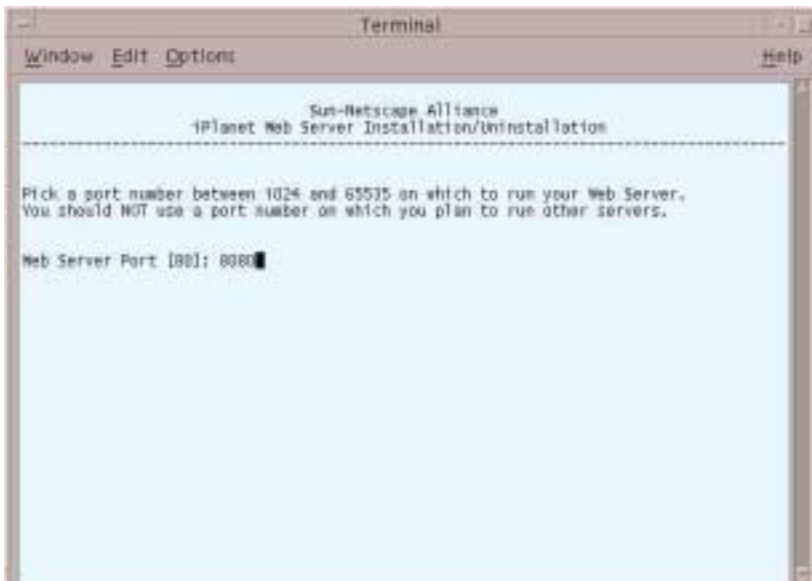
11. Create a password and enter it twice. This password will be used to access the administration of iWS.



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

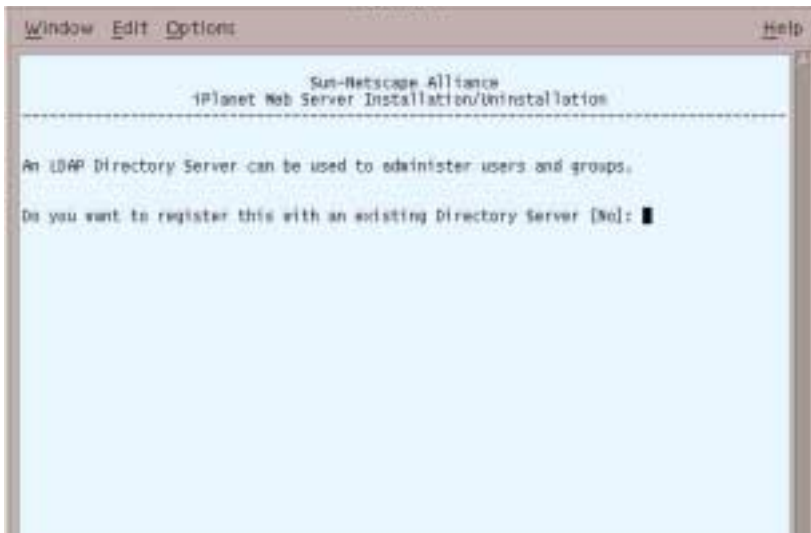


13. At the next screen, enter your iWS port number. The default shown is 8080.

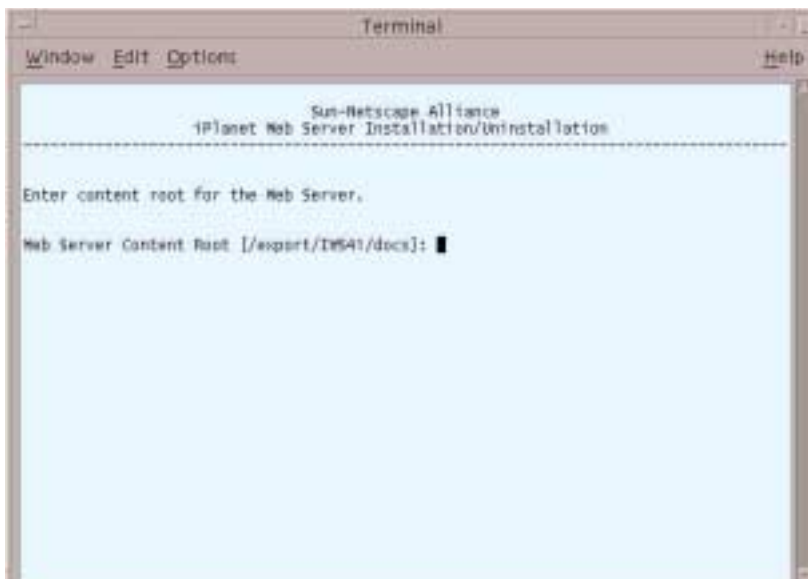


14. The LDAP Directory Server screen displays. If other iPlanet products have been installed on this network, you can unify the administration of the separate servers by typing **y** and entering the necessary information.

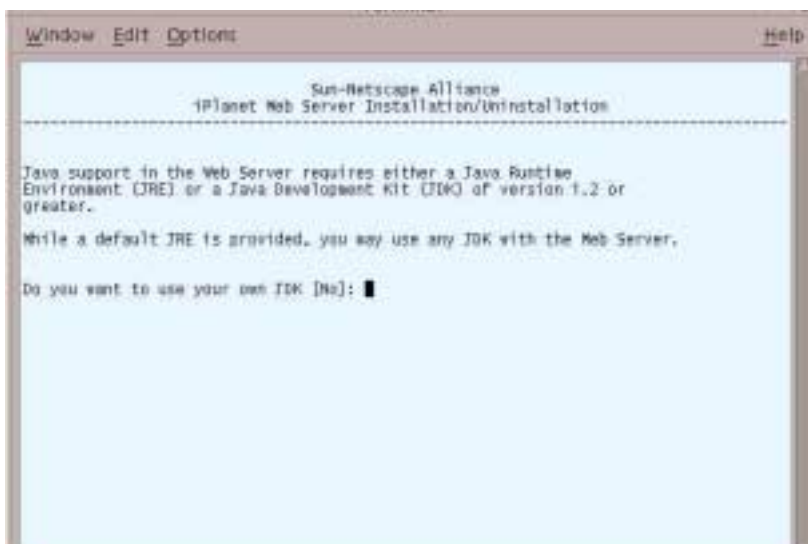
Press Enter if you do not want to register this directory server.



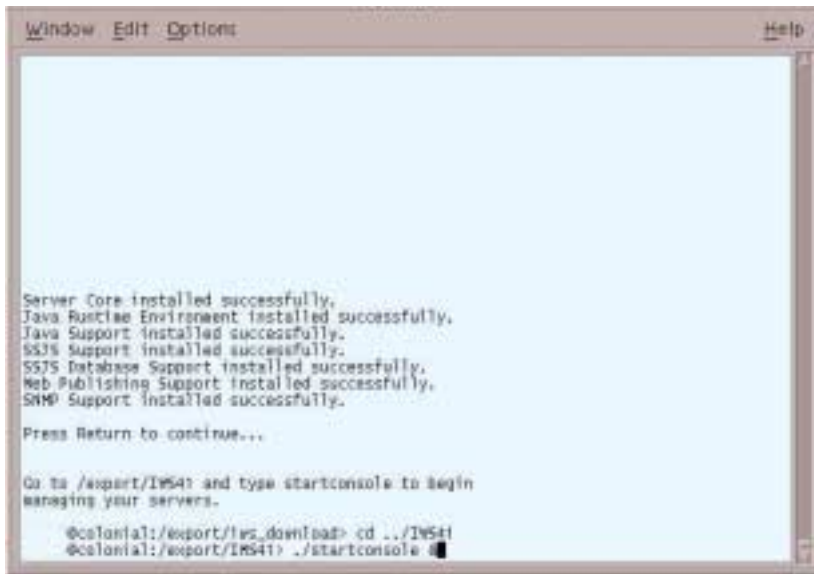
15. At the next screen, press Enter to accept the default, which is the location of the documents for iWS.



16. The Java Support screen displays. SellerXpert 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 `y` 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/iWS4 and type startconsole to begin
managing your servers.

@colonial:/export/ifs_downloads> cd ../iWS4
@colonial:/export/iWS4> ./startconsole █
```

18. Press Enter to continue.

The iWS is now running.

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 SellerXpert 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 SellerXpert installation. Otherwise, you must manually convert Actuate to run with SellerXpert.

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 plan to use to install SellerXpert.

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

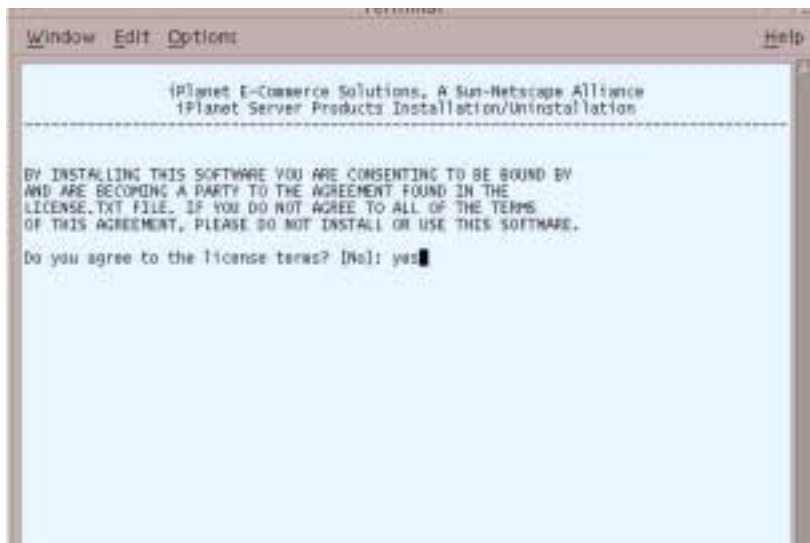
<http://docs.iplanet.com/docs/manuals/index.html>

To install iAS:

1. Unzip and set up the iAS file:

```
# unzip ias60sp2-solaris.tar.gz
# cd installer
# ./setup
```

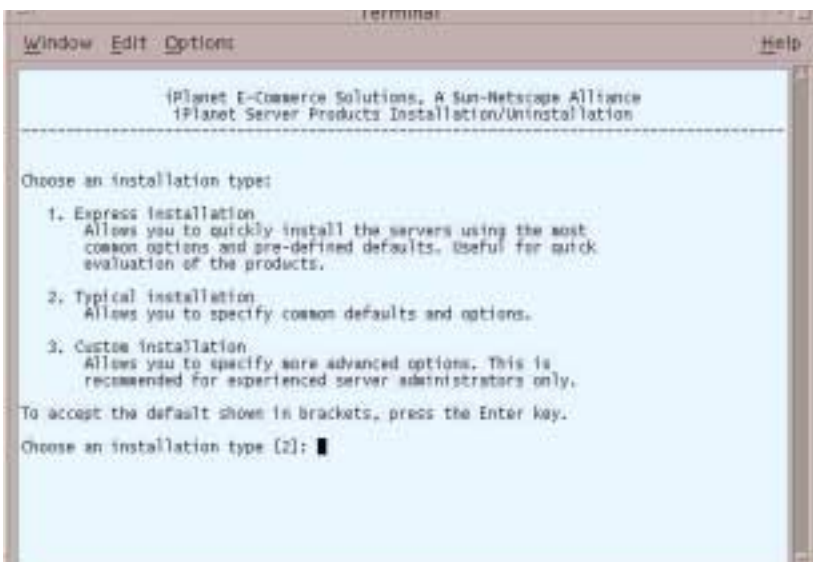
2. The Welcome screen displays. Press Enter to continue.
3. The Licensing Agreement screen displays. Type **yes**.



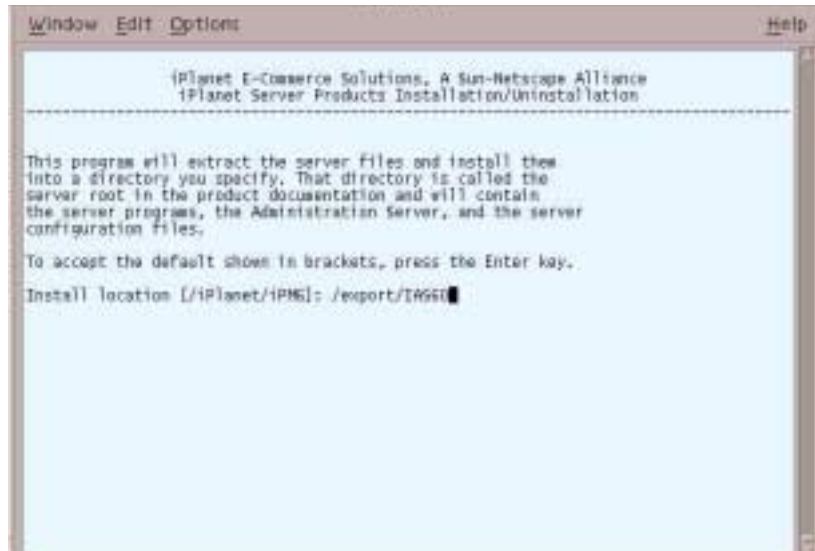
4. The Install Items screen displays. Press Enter to accept iPlanet servers.



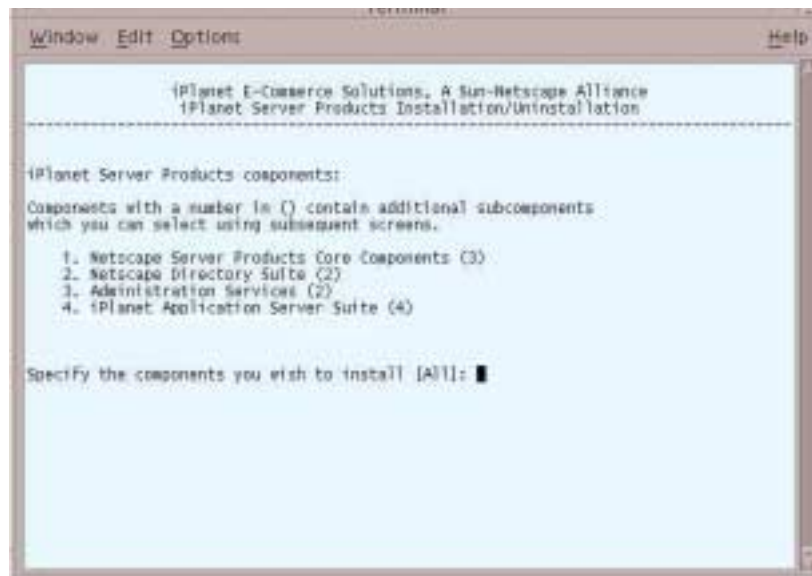
5. The Installation Type screen displays. Press Enter to accept a typical installation.



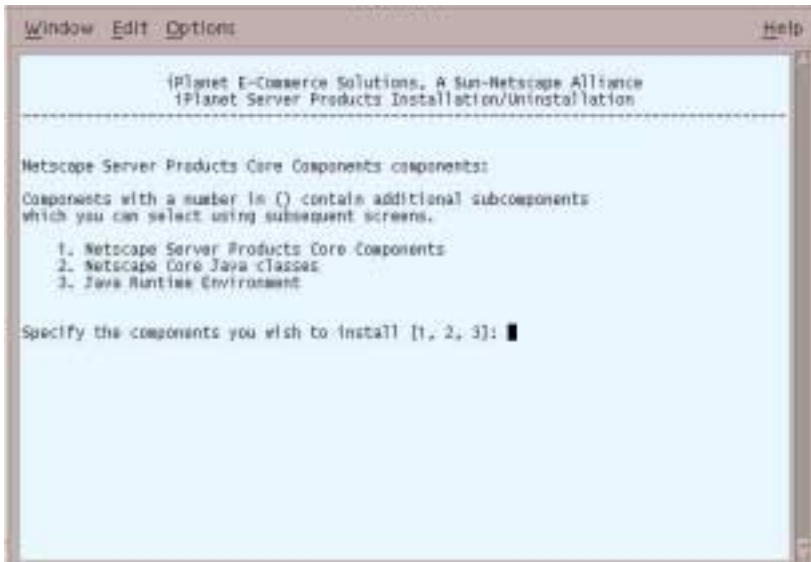
6. The Extract Server Files screen displays. Type `/export/IAS60` or the location you want to install iAS.



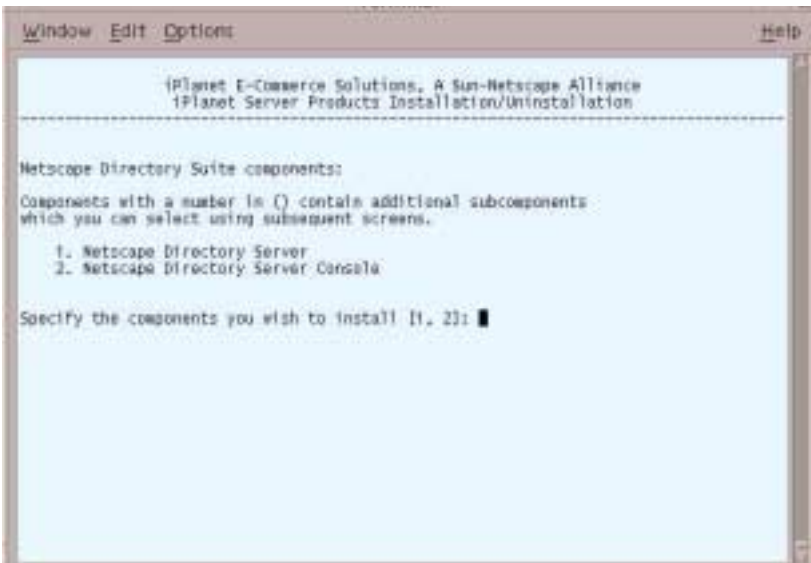
7. The Server Products screen displays. Since SellerXpert will need all the components listed, press Enter.



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



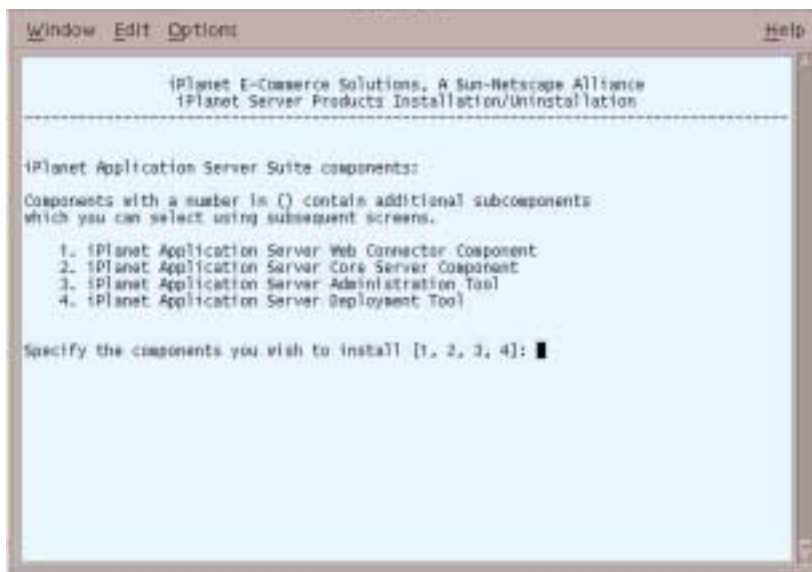
9. The Directory Suite Components screen displays. Press Enter to specify all the components listed.



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 Domain Name screen displays. Enter the domain name where you are installing the server software. See section , Step 8.



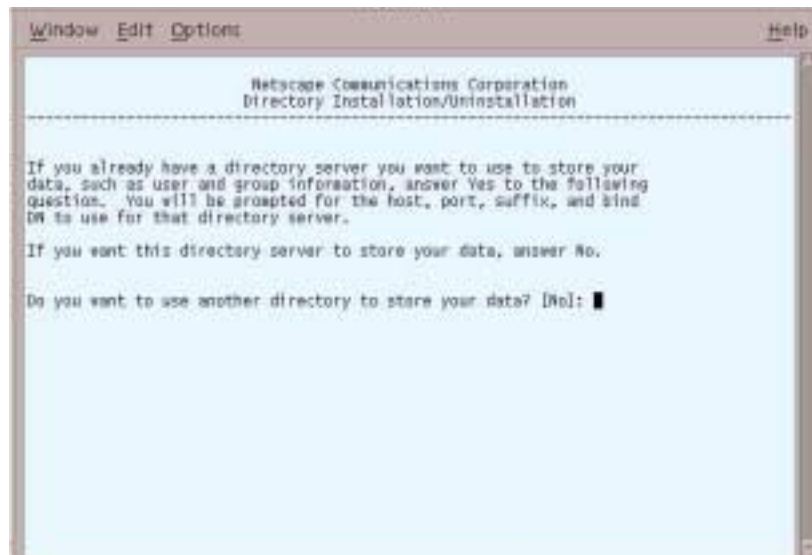
13. The Unix User and Group screen displays. Enter the system user and group name that was created in the section, , Step 9.



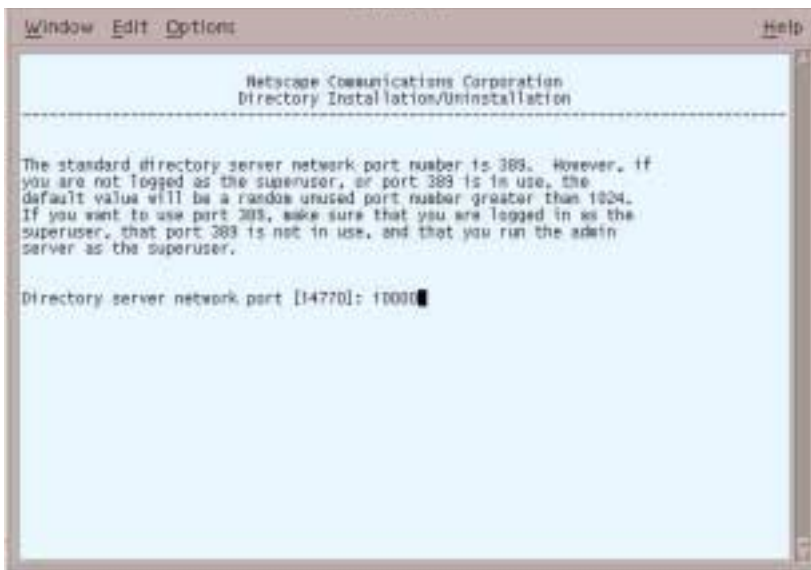
14. The Configuring Server screen displays. Type **yes** if you want to register this software or press **Enter** if you do not.



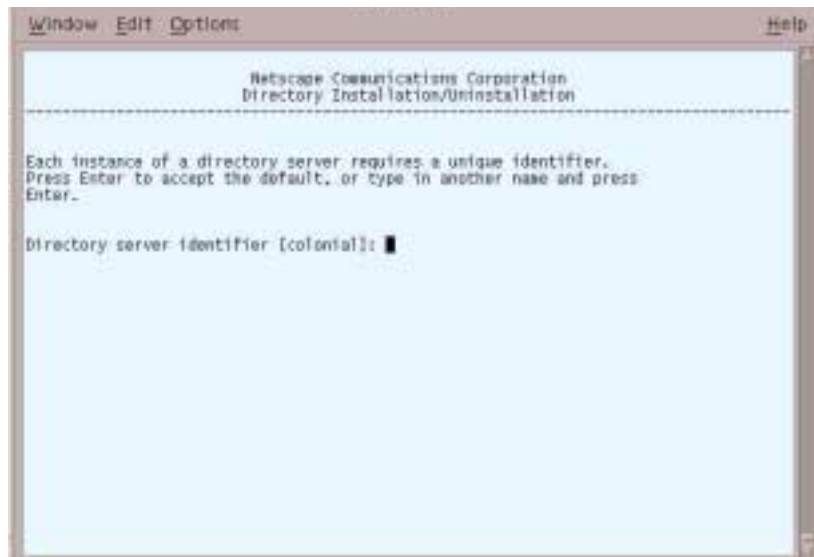
15. The Store Directory Server screen displays. Press **Enter** to continue.



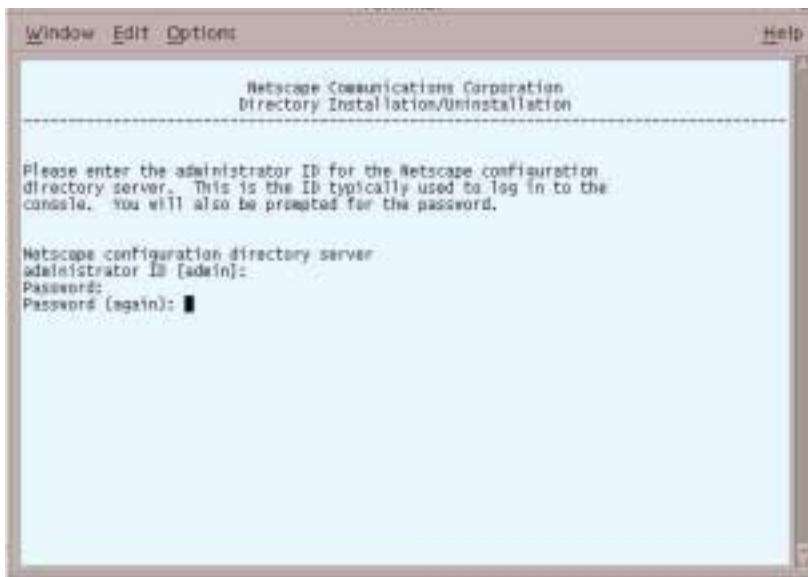
16. The Directory Server Network Port screen displays. Type 10000 or other port number.



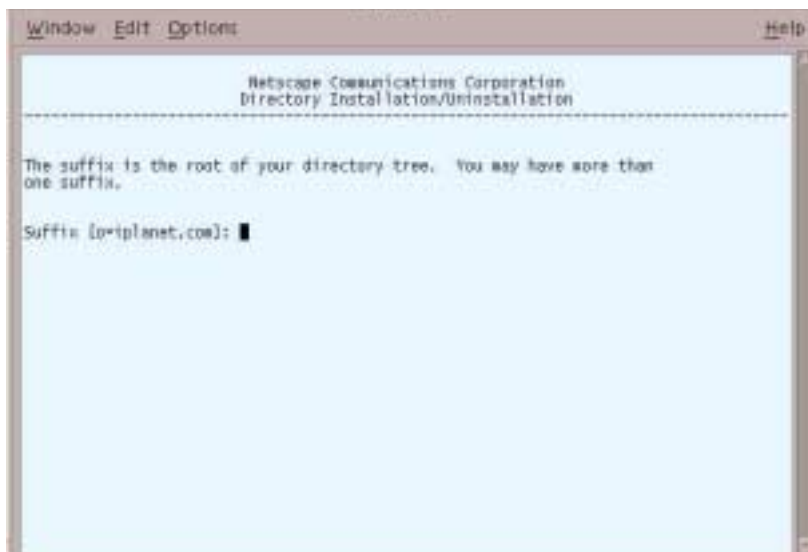
17. The Directory Server Identifier screen displays. Press Enter to accept the default.



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



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



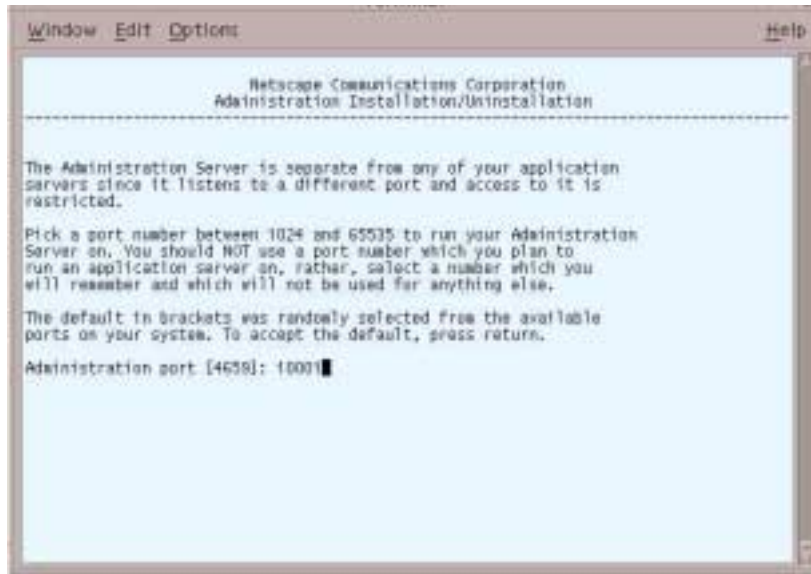
20. The Directory Manager Distinguished Name (DN) screen displays. Press Enter to accept the default Directory Manager DN, then enter your password and the password again.



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



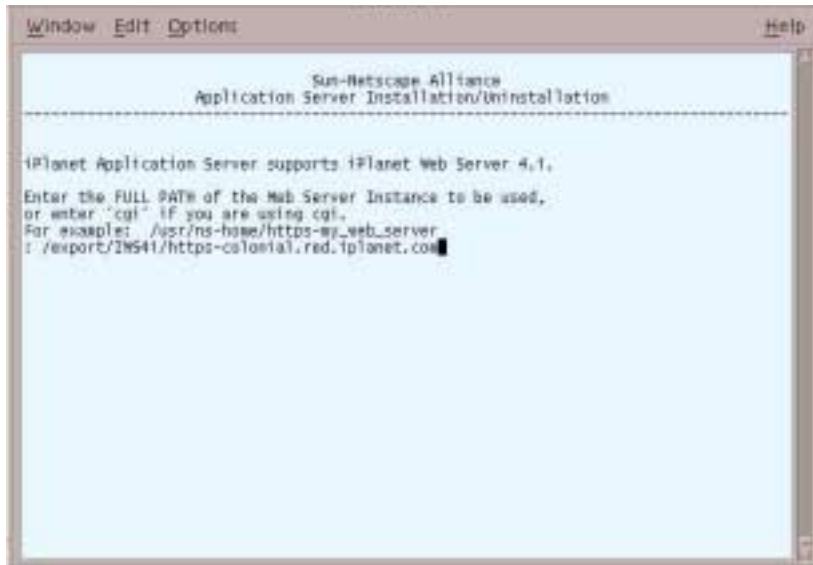
22. The Administration Server Port screen displays. Type 10001 or your port number.



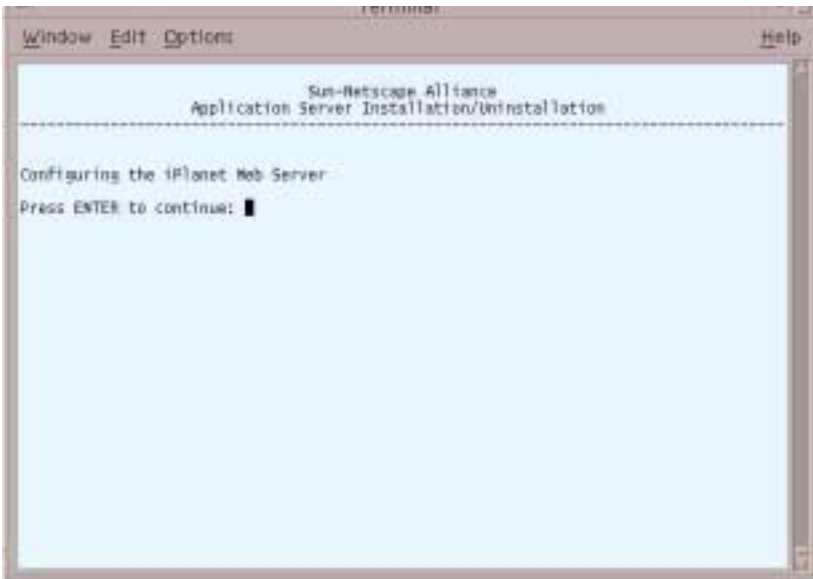
23. The Administration Server screen displays. Press Enter to accept the default.



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



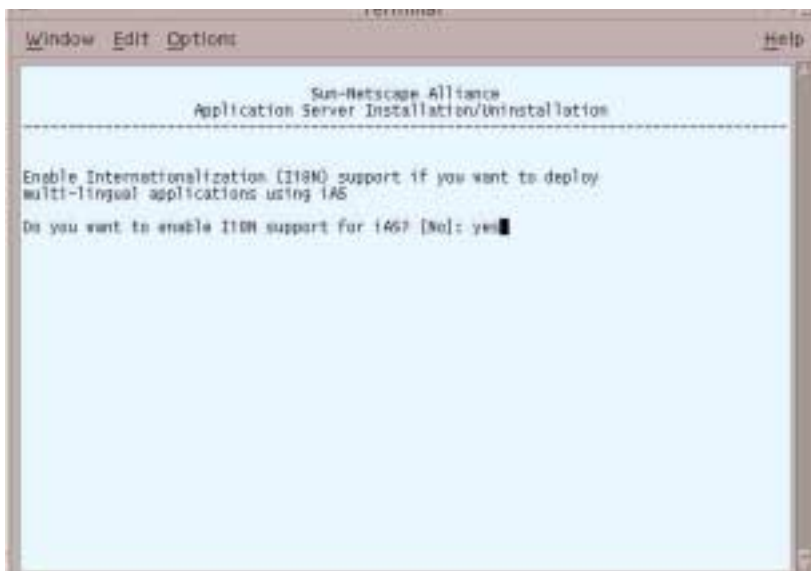
25. The next screen displays with this message: Configuring the iPlanet Web Server. Press Enter to continue.



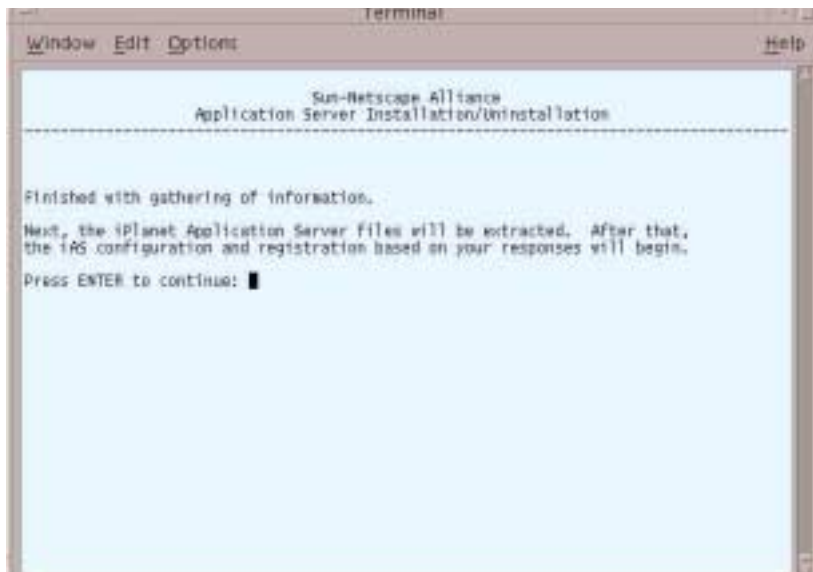
26. The Administration Server Username and Password screen displays. Enter your administration server username, your password, and the password again.



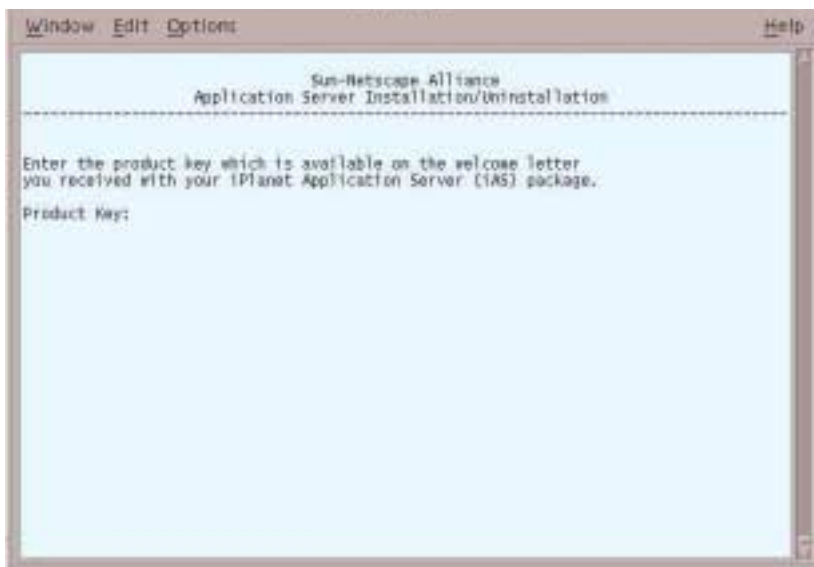
27. The Enable Internationalization screen displays. Type **yes** to enable international support for iAS.



28. When this screen displays, press Enter to continue.



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

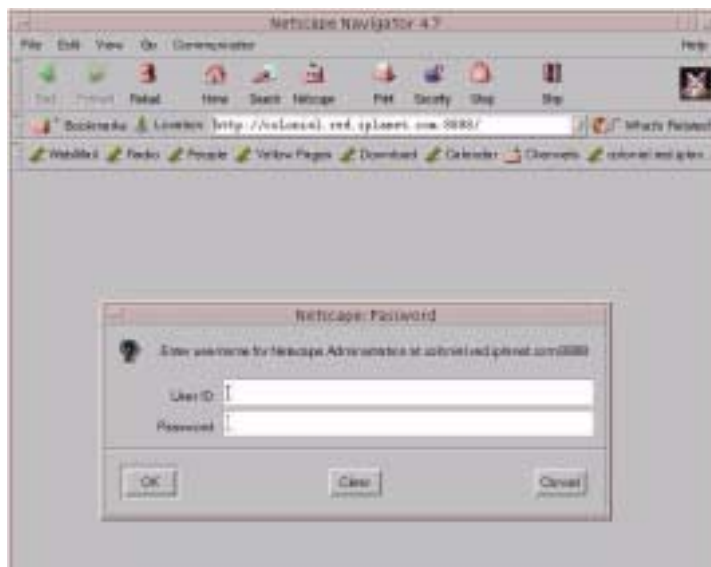


This installation will take several minutes.

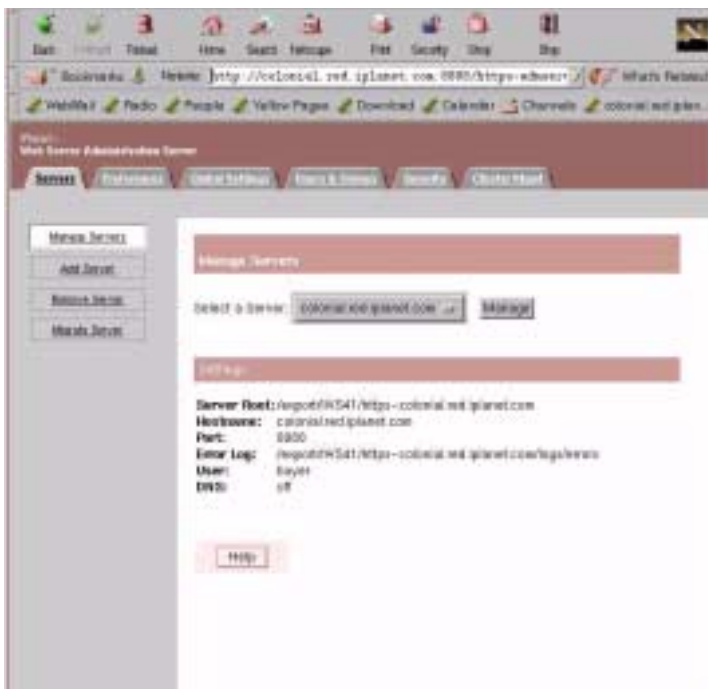
Reloading Configuration Files

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

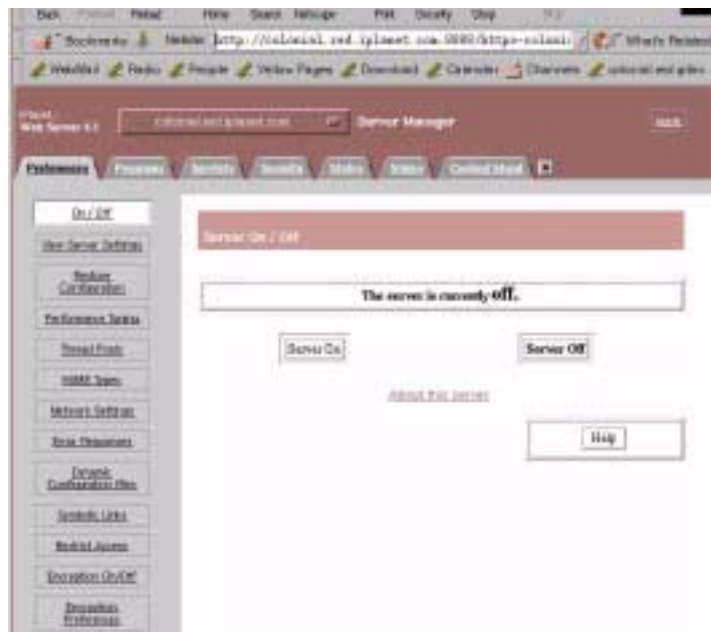
1. Run `startconsole` from *IWS_ROOT*.
2. The browser is launched and the login screen displays. Enter the username and password you created in Step 11.



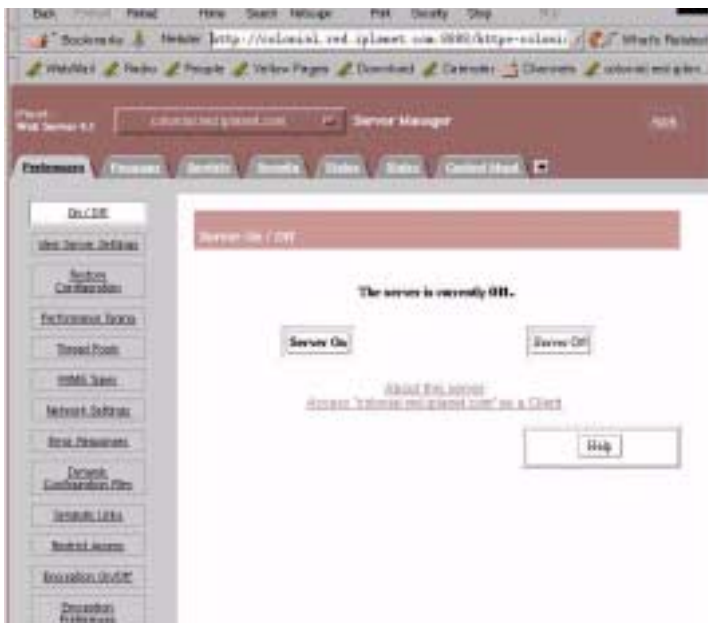
3. The Manage Server screen displays. Click the server name (located next to Select a Server) and then click Manage.



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.

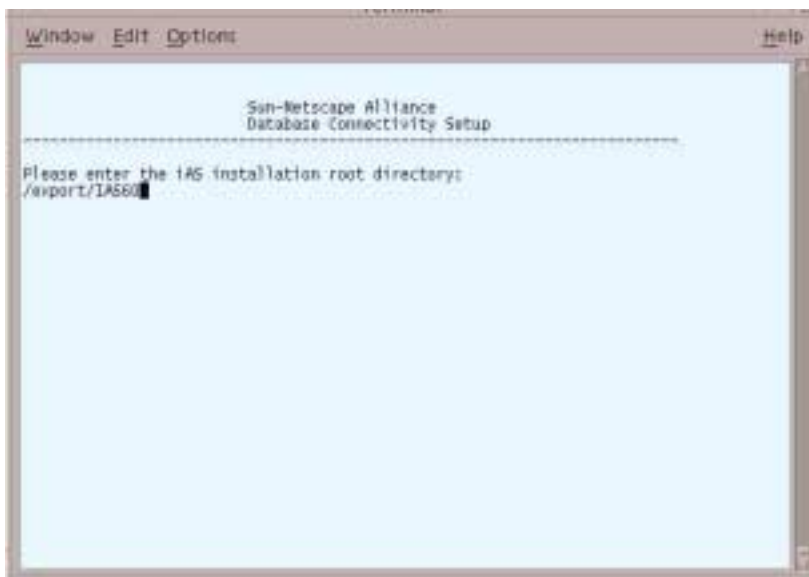
Enabling the Database with iAS

1. Set up the database session script:

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

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

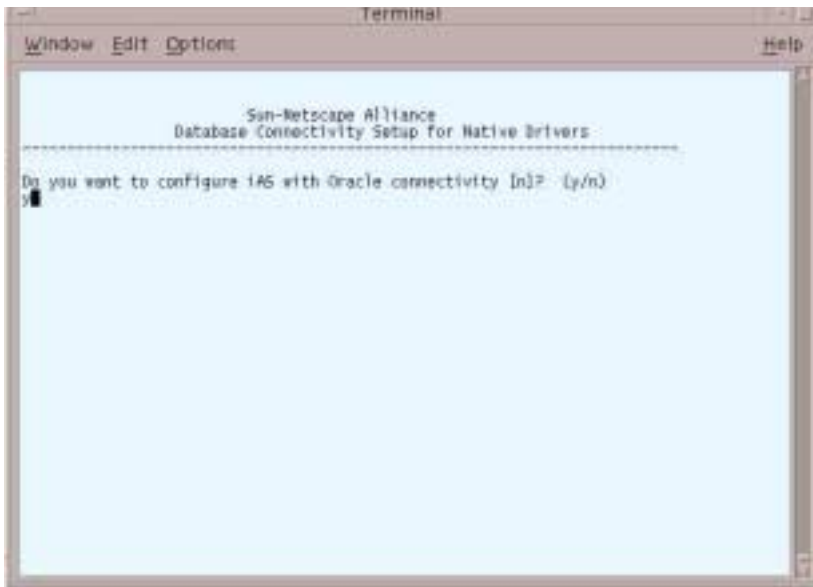
2. The Database Connectivity Setup prompt displays. Enter the location where iAS is installed (shown as /export/IAS60 in the example).



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



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



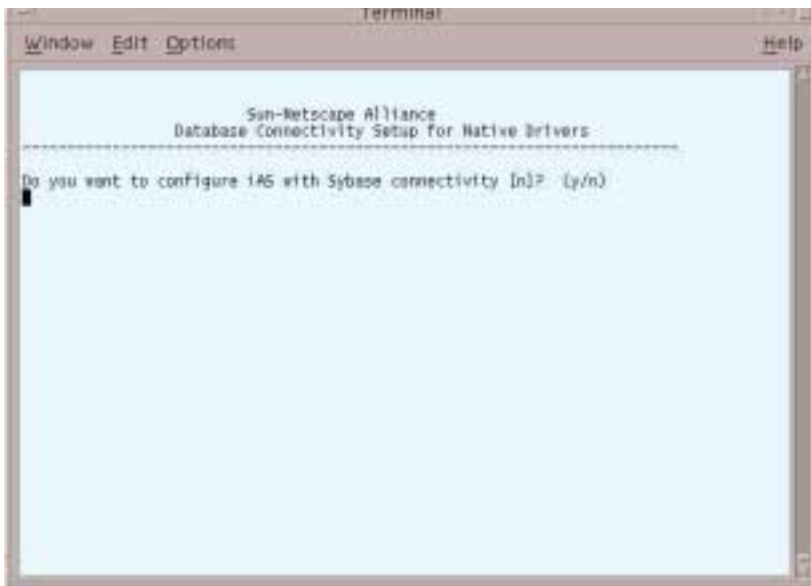
5. The Oracle prompt displays. Enter your Oracle home directory.



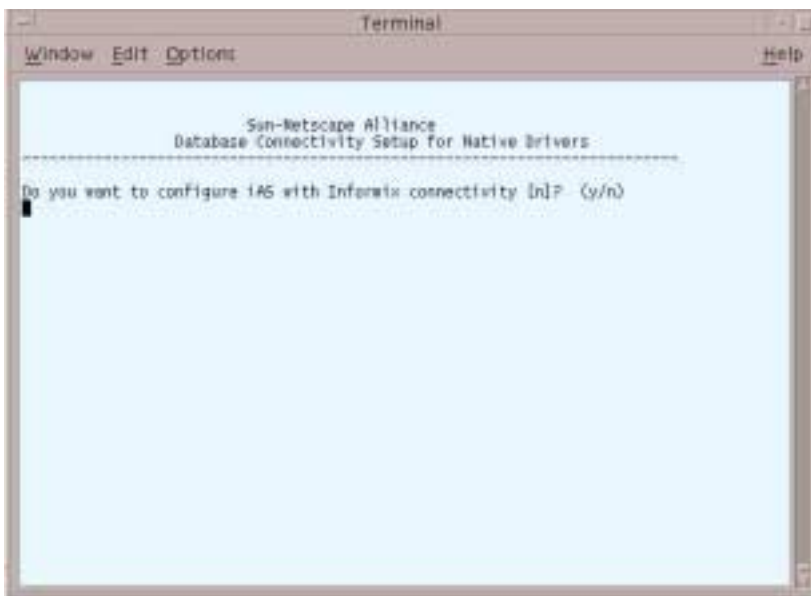
6. The next Oracle prompt displays. Enter your Oracle SID that you wish to connect to.



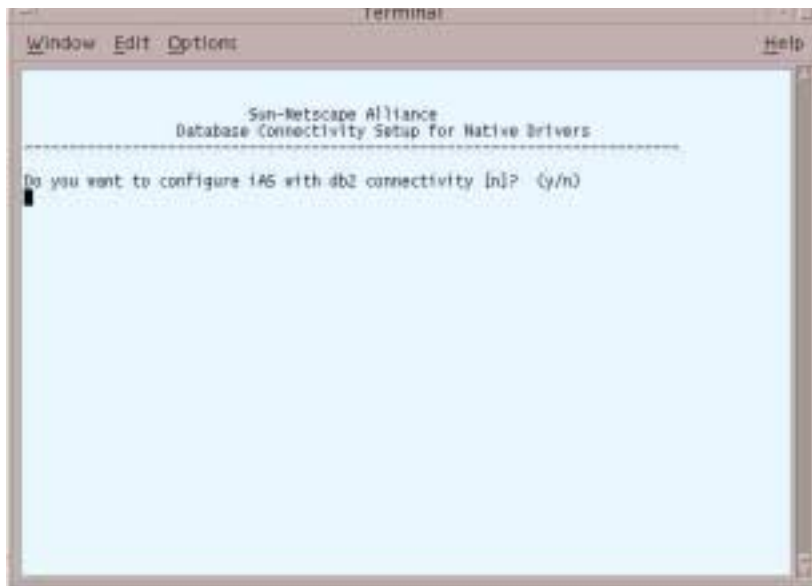
7. The Sybase prompt displays. Press Enter to continue.



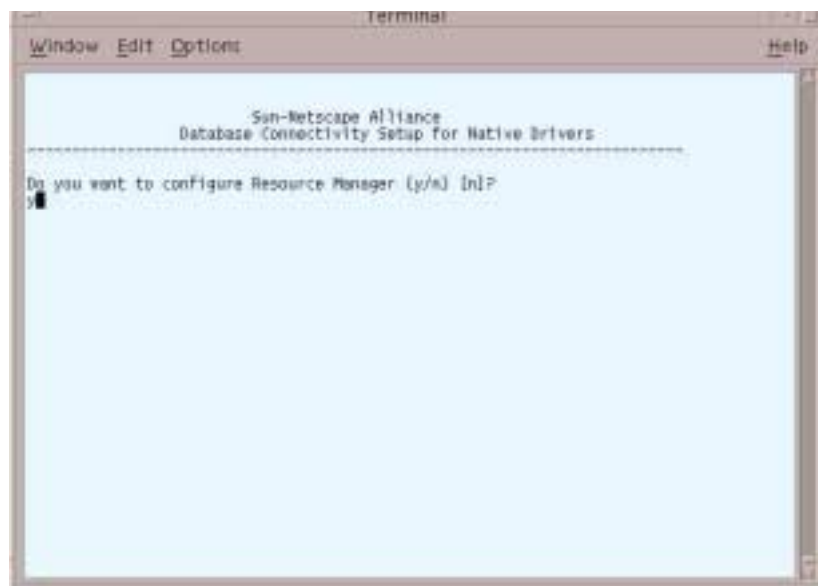
8. The Informix prompt displays. Press Enter to continue.



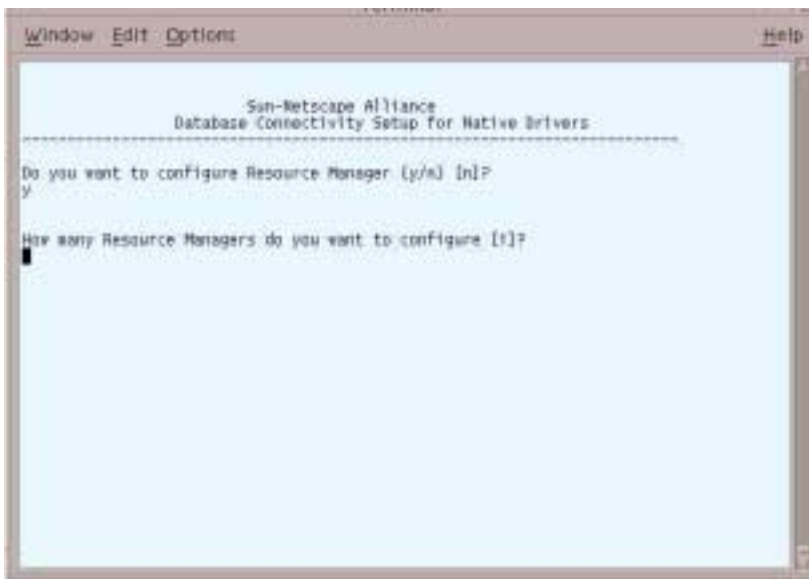
9. The db2 prompt displays. Press Enter to continue.



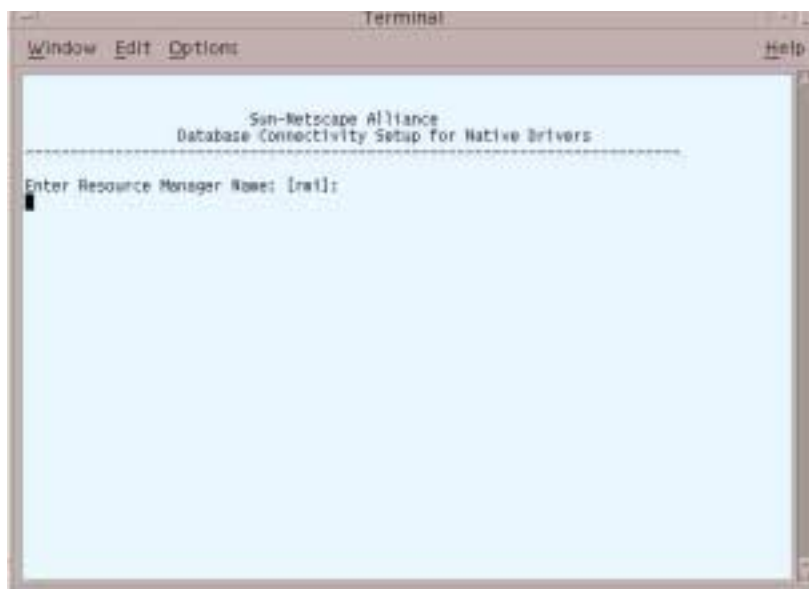
10. The next prompt displays. Type `y` to configure the Resource Manager.



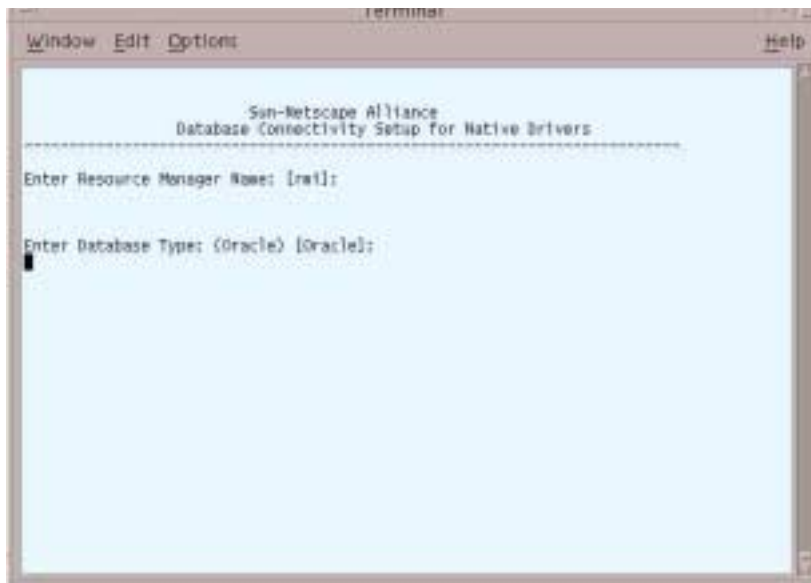
11. The next prompt displays. Press Enter to accept the default.



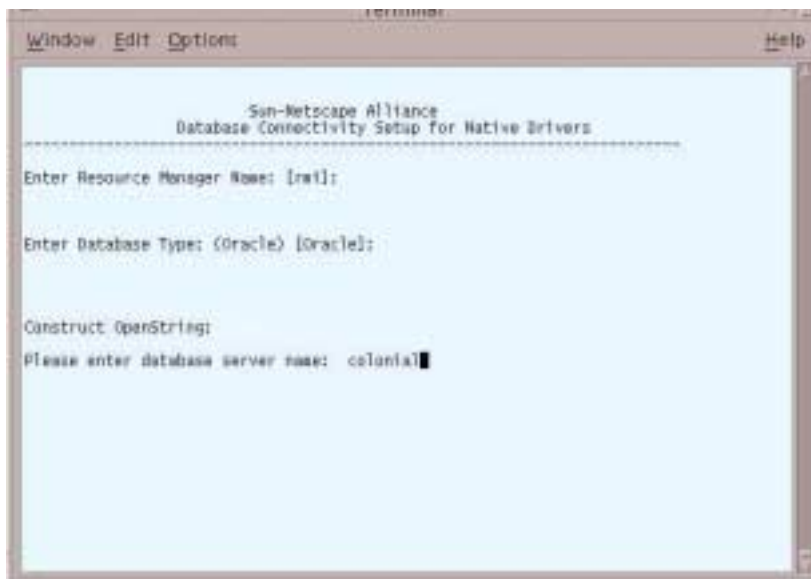
12. The next prompt displays. Press Enter to accept the default.



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

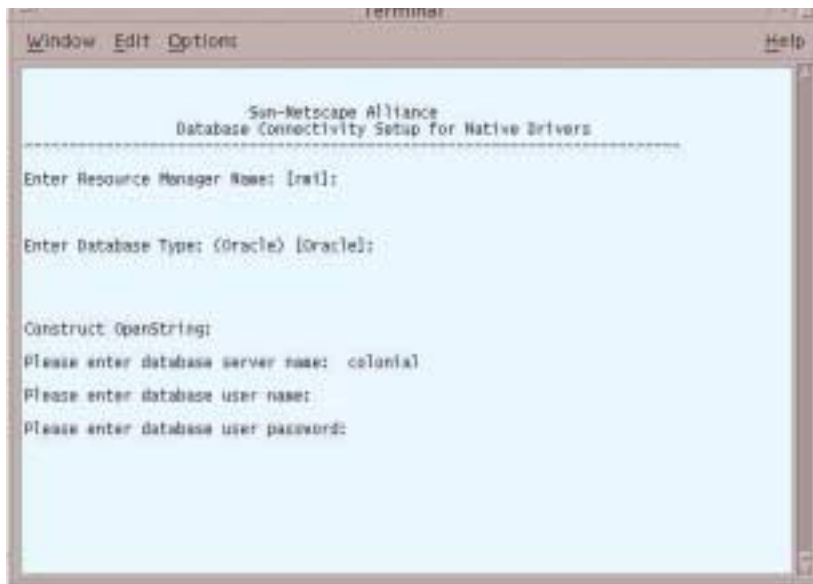


14. The next prompt displays. Enter the database server name (the machine where Oracle is installed).

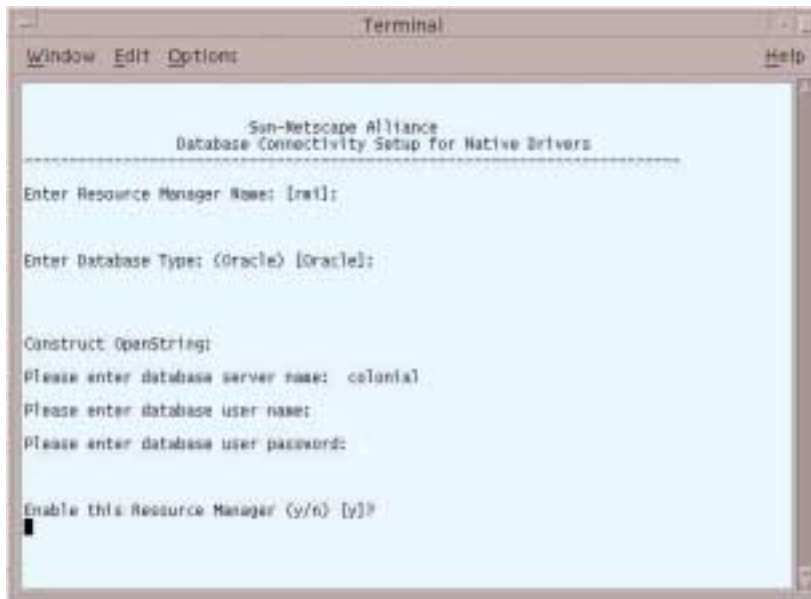


15. The next prompt displays. Enter the database user name and password.

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

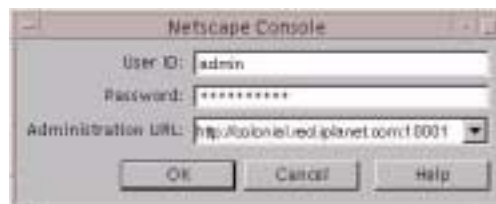


16. The next prompt displays. Press Enter to enable the Resource Manager.

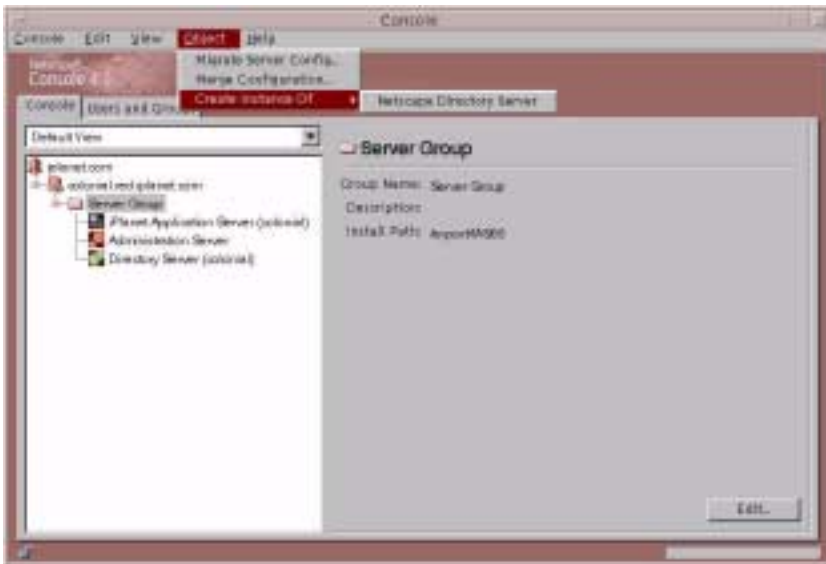


Creating an iPlanet Directory Server (LDAP) Instance

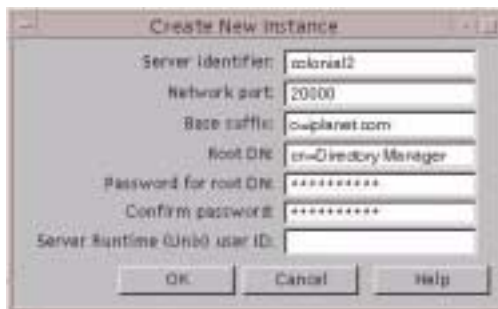
1. Start console using this command:
`% IAS-ROOT/startConsole`
2. When this screen displays, enter your password and click OK. This is the password you specified in Step 18 of the iAS installation.



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.

Installing SellerXpert

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

- Preparing to Unload the Distribution Media
- Verifying the Database and Server Installations
- Installing SellerXpert Software
- Preparing the Seed Data Storage
- Configuring SellerXpert for Secure Transfer of Sensitive Data

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 SellerXpert software behind the firewall.

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

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

SellerXpert CD-ROM Contents

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

```
sellerxpert.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, SP7
- iPlanet Application Server (iAS) 6.0, SP2 (to do this, execute `IAS/bin/KIVAses.sh start`).

Information About Sample Data

During the installation of SellerXpert, an option to load sample data is available. This sample data is designed to demonstrate various features of SellerXpert. 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 SellerXpert 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 SellerXpert to look at a suffix other than `o=iplanet.com` as the search root. To use the sample data, you will have to configure SellerXpert 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 SellerXpert installation.

Installing SellerXpert Software

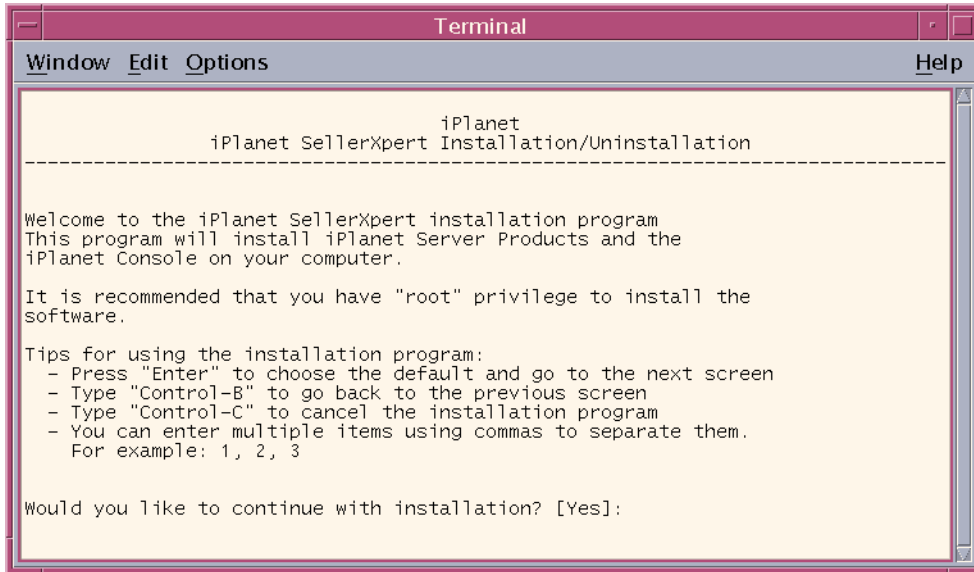
NOTE When you install SellerXpert, you must use the same Unix user and group that you used to install iAS.

To install the SellerXpert software from the CD:

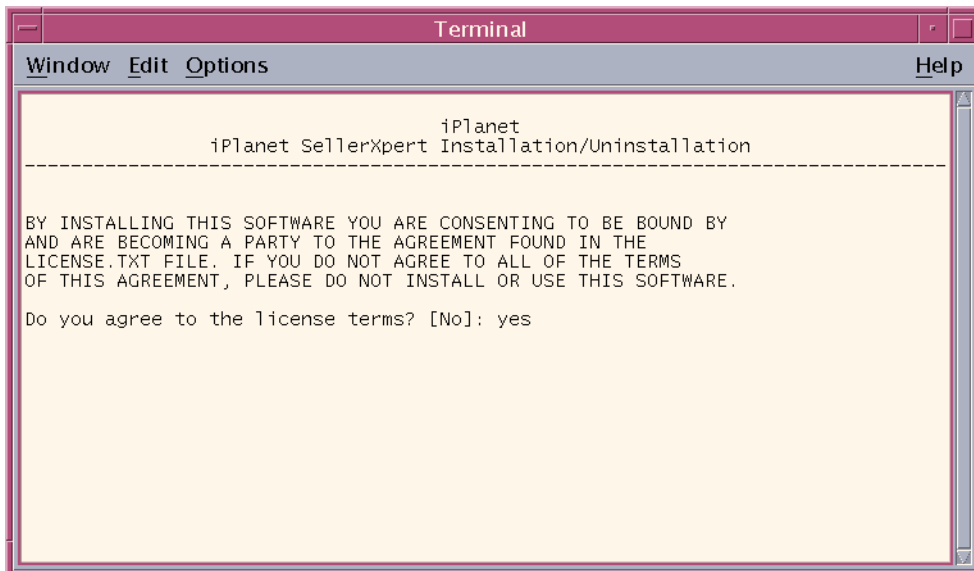
1. Change to the SellerXpert directory and run the setup script:

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

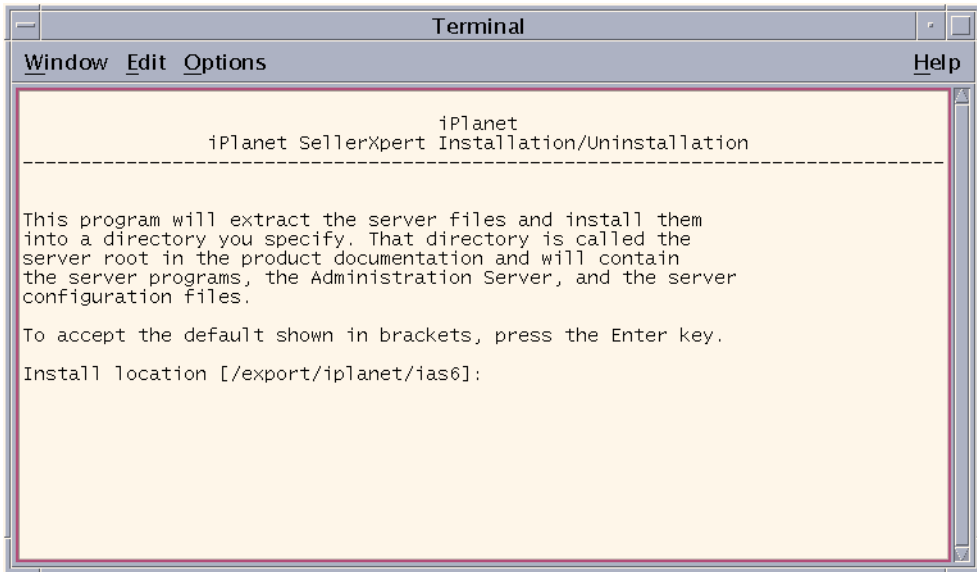
2. The Welcome screen displays. Read the instructions and press Enter to continue.



3. At the next screen, enter **yes** to agree to the license terms and continue.



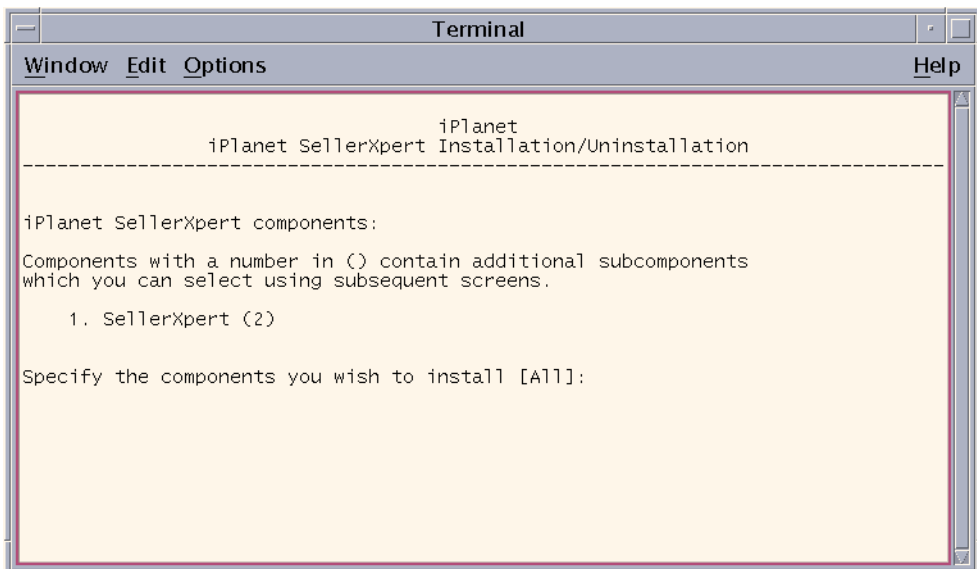
4. The Installation Location screen displays. Type `/export/IAS60` (this is the location where iAS is installed).



```
Terminal
Window Edit Options Help
iPlanet
iPlanet SellerXpert Installation/Uninstallation
-----
This program will extract the server files and install them
into a directory you specify. That directory is called the
server root in the product documentation and will contain
the server programs, the Administration Server, and the server
configuration files.

To accept the default shown in brackets, press the Enter key.
Install location [/export/iplanet/ias6]:
```

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

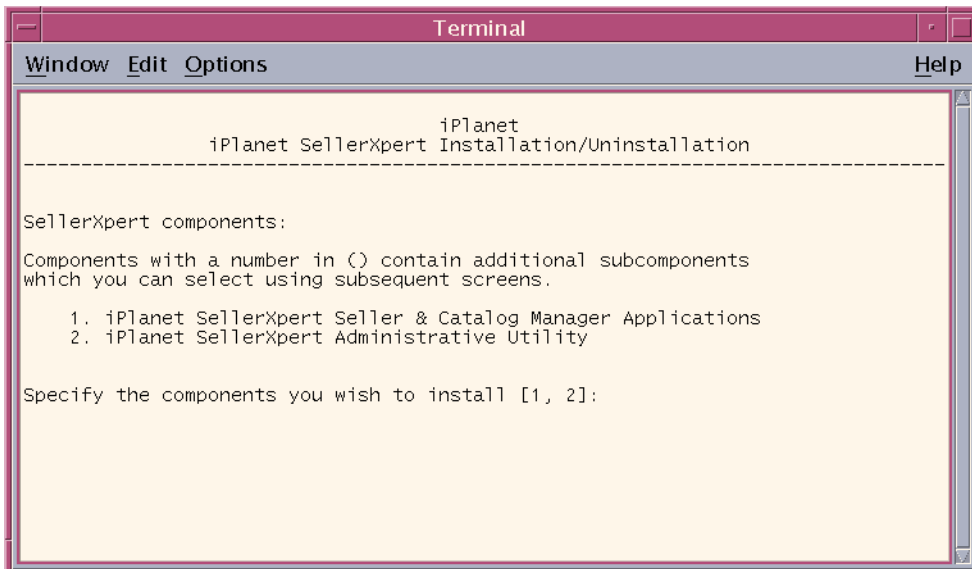


```
Terminal
Window Edit Options Help
iPlanet
iPlanet SellerXpert Installation/Uninstallation
-----
iPlanet SellerXpert components:
Components with a number in ( ) contain additional subcomponents
which you can select using subsequent screens.

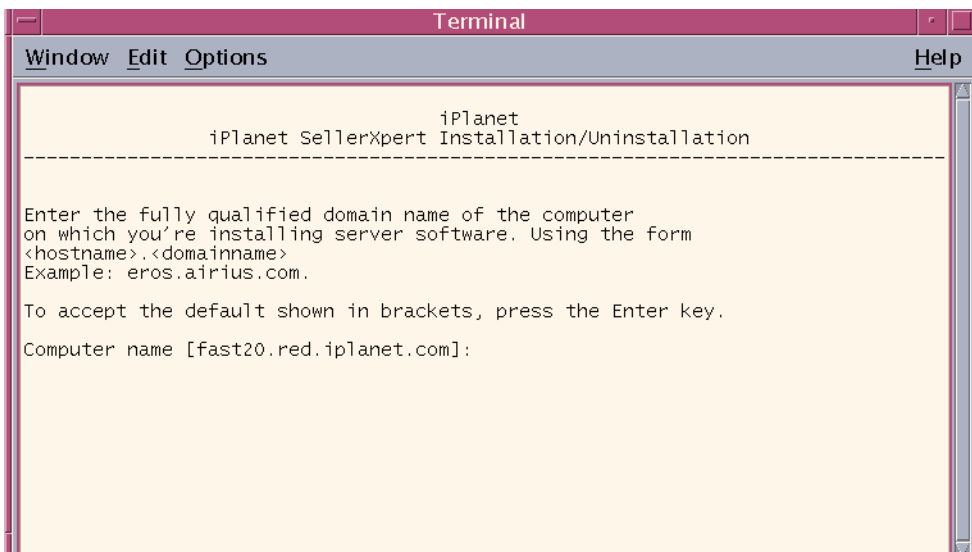
1. SellerXpert (2)

Specify the components you wish to install [A1]:
```

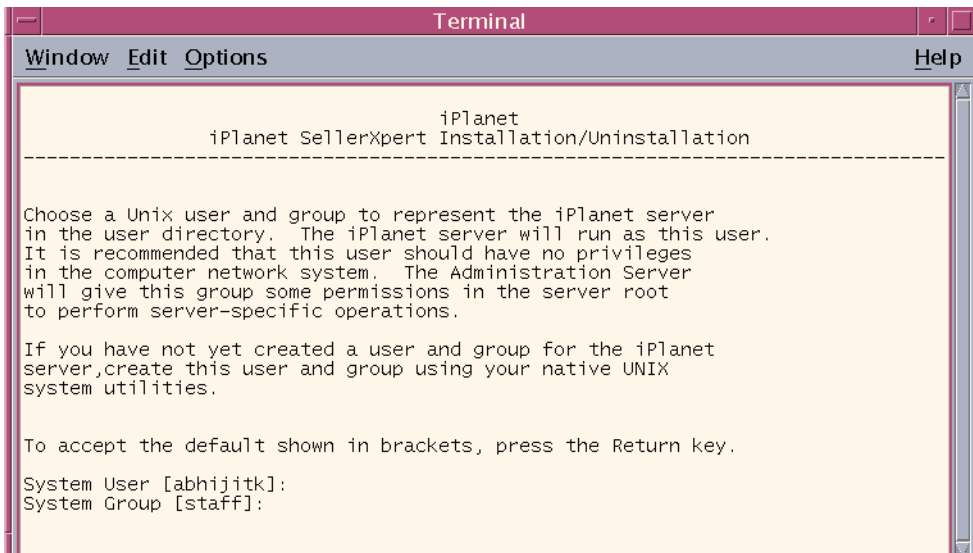
6. The Additional SellerXpert Components screen displays. The default is all components listed are installed. If you wish to install different components on another machine, select the component(s) that you need and press Enter. It is recommended to install all the components first.



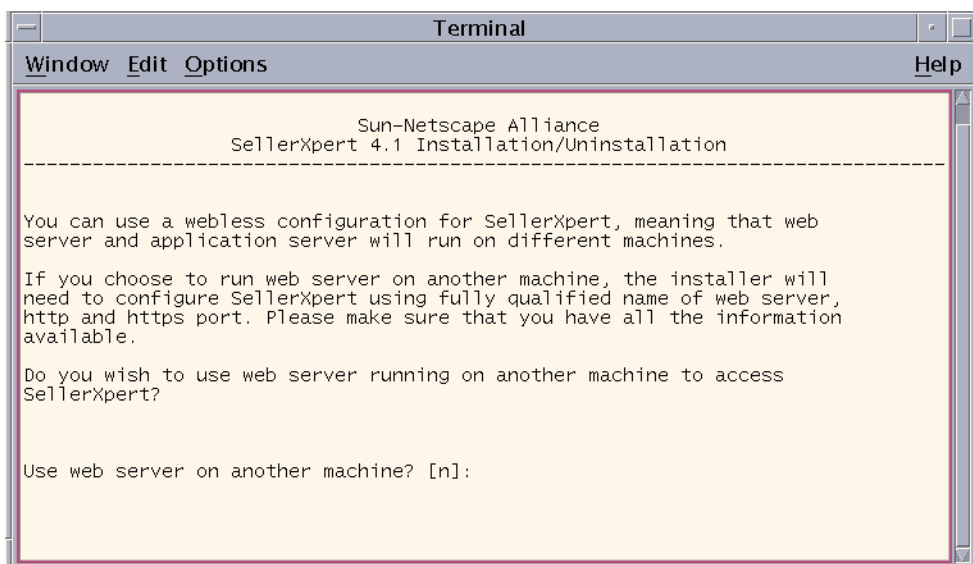
7. When the next screen displays, read the instructions and press Enter to continue.



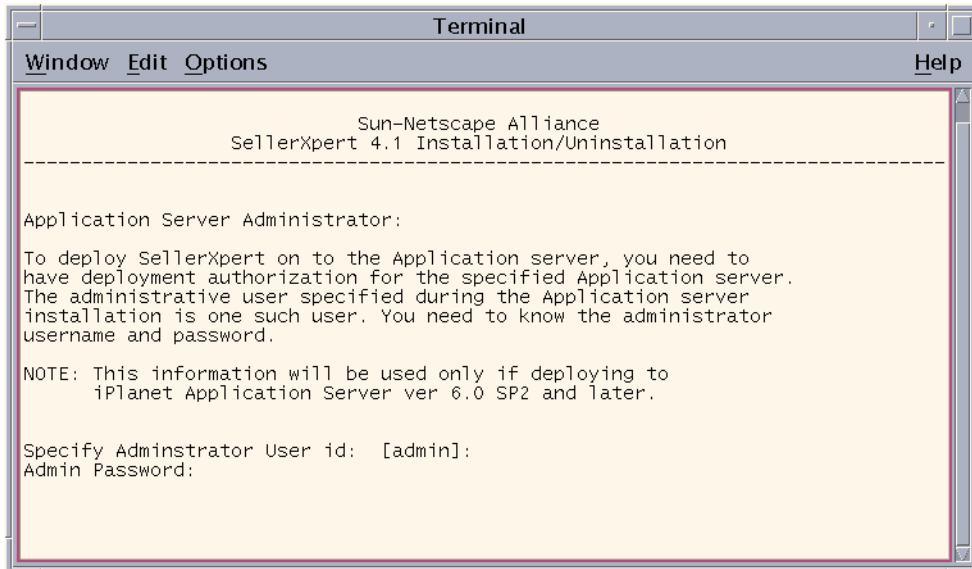
8. The Choosing a Unix User and Group screen displays. This is the same Unix user and group you created in Chapter 3, Installing iPlanet Web Server (iWS), Step 9. Press Enter to continue.



9. SellerXpert needs to be configured with the iWS name and port. If you do not want to use iWS installed on the same machine as iAS, type **y**.



10. 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 27).



11. 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.

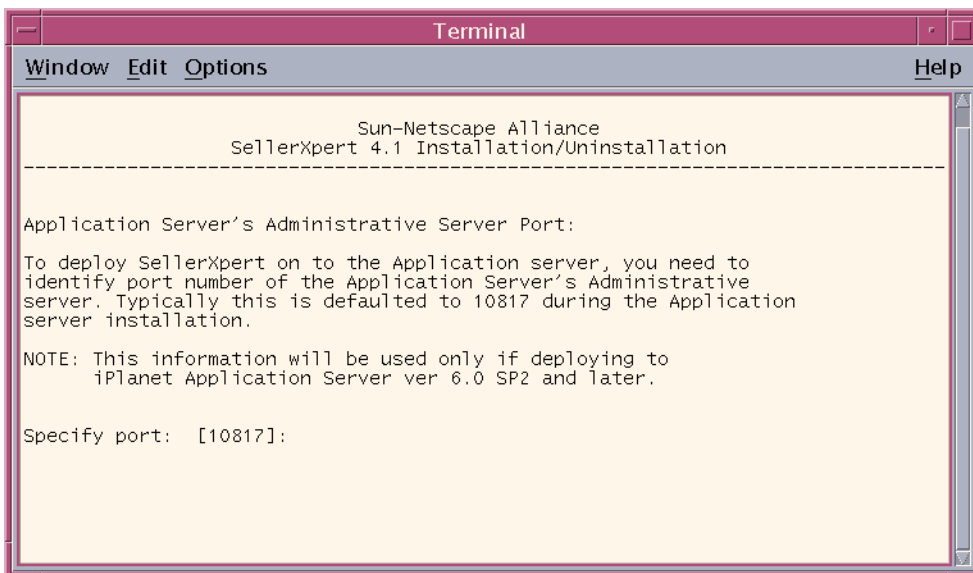
NOTE To check the port number, execute:

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

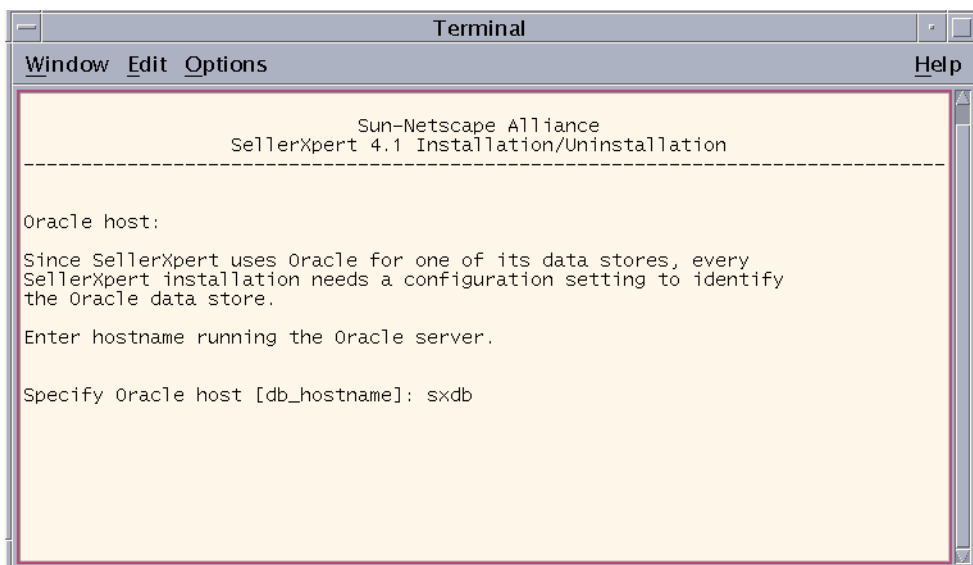
When the screen displays, expand the tree:

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

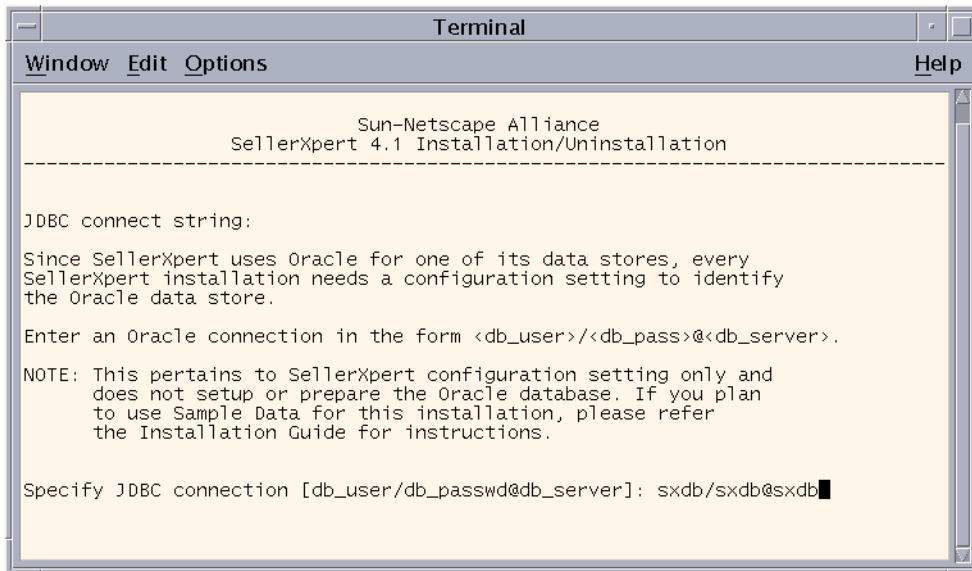
The default port number displays.



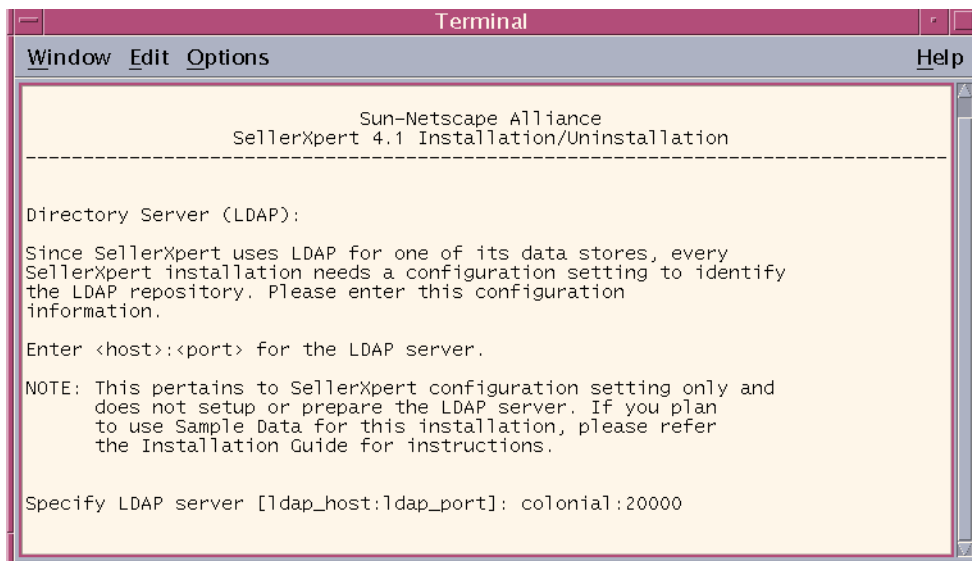
12. The Oracle Database Host screen displays. Enter the machine name where Oracle is installed.



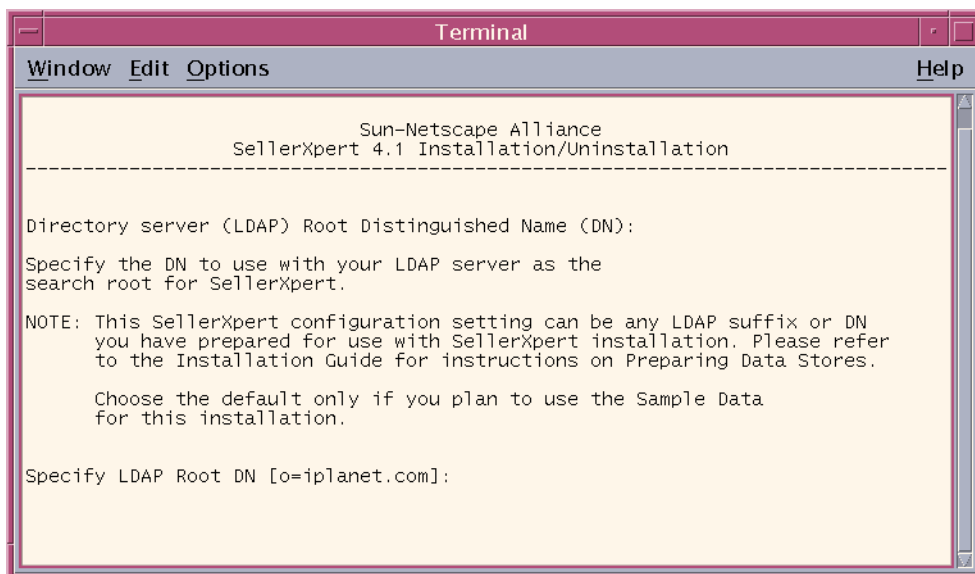
- The Oracle Connection (JDBC) screen displays. The JDBC connection is the user name and password in the format *username/password@ORACLE_SID*. The installer will create this Oracle user.



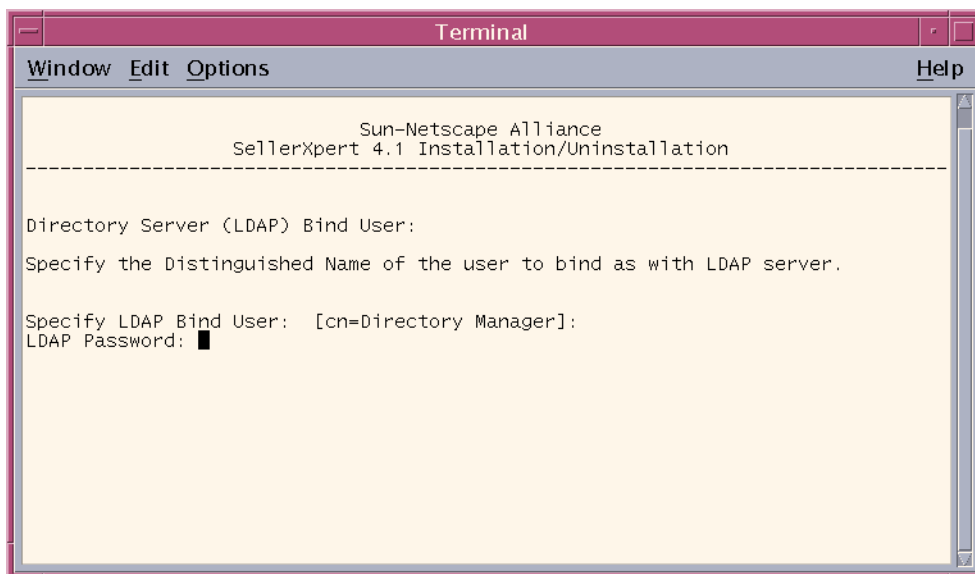
- At the next screen, read the instructions and enter the Directory Server (LDAP) name.



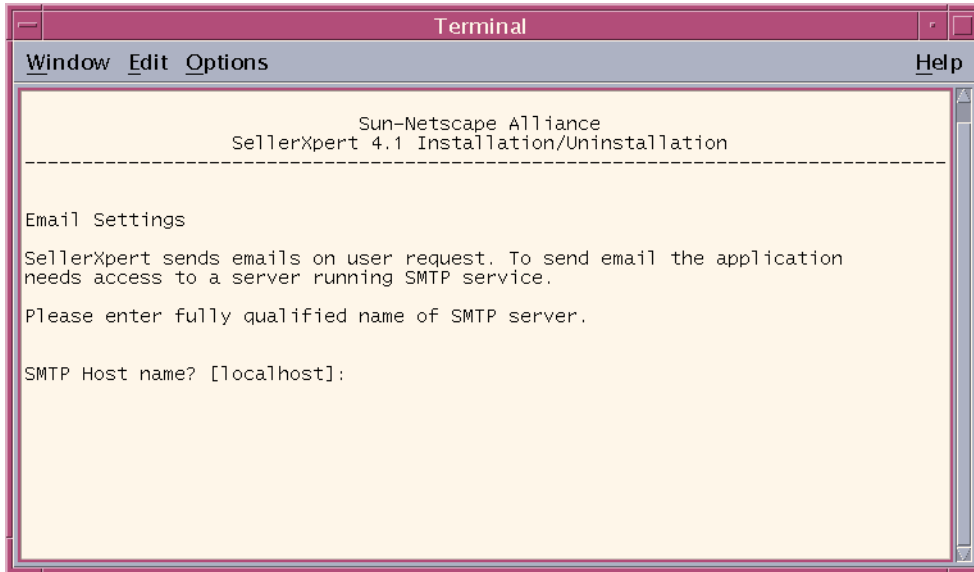
15. At the next screen, read the instructions and press Enter to continue.



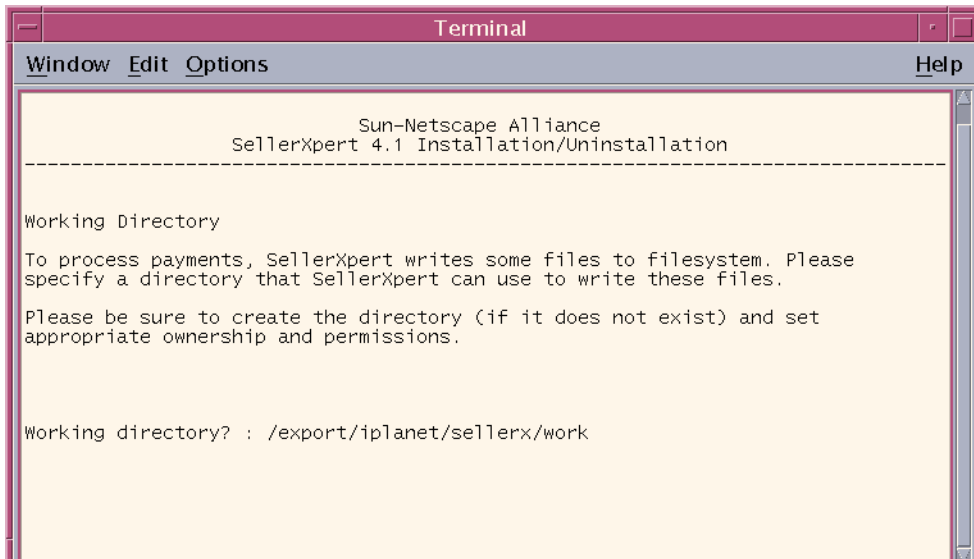
16. At this screen, enter the Directory Server user and password.



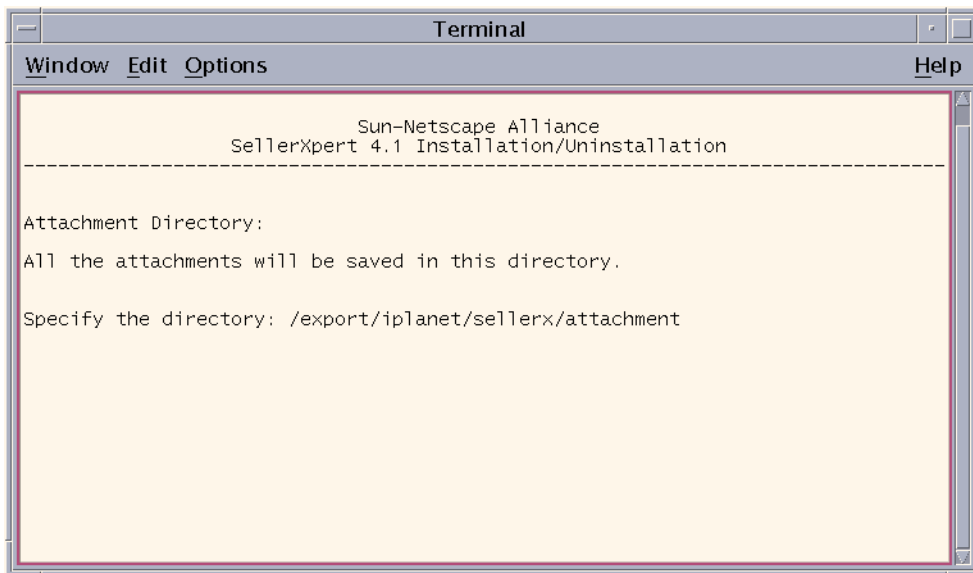
17. When the Email Settings screen displays, enter the SMTP host name.



18. When the next screen displays, enter the working directory where SellerXpert will write files.



19. 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.

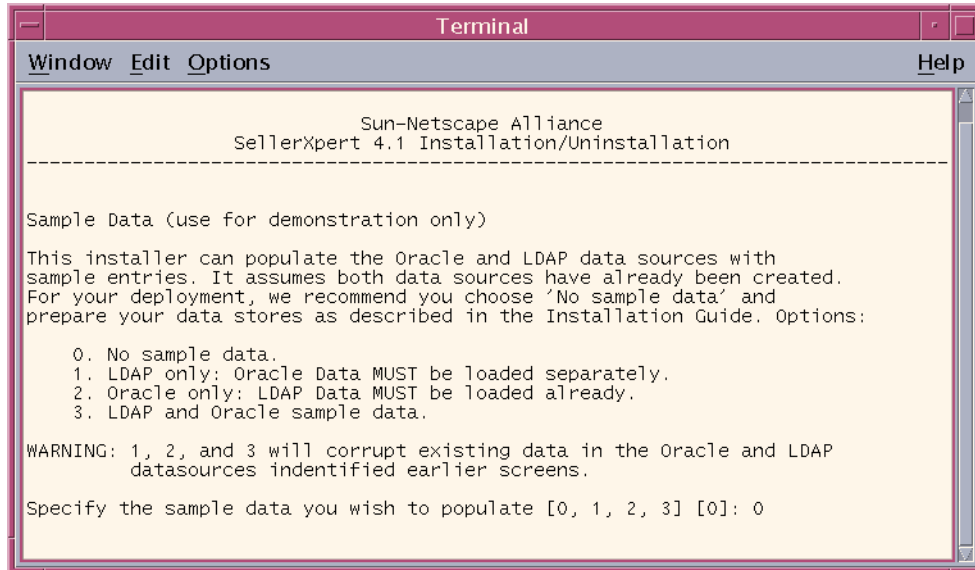


20. When the Sample Data screen displays, choose your option for installing sample data. Type `3` to include sample data.

NOTE For SellerXpert 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.

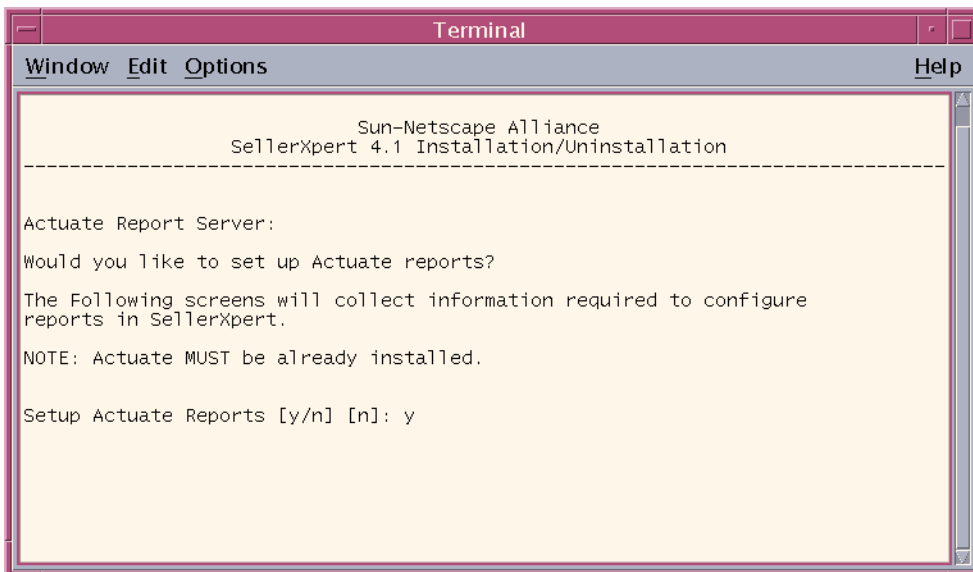
For information on sample data, refer to the section, Information About Sample Data, located at the beginning of this chapter.

NOTE The SellerXpert 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 SellerXpert

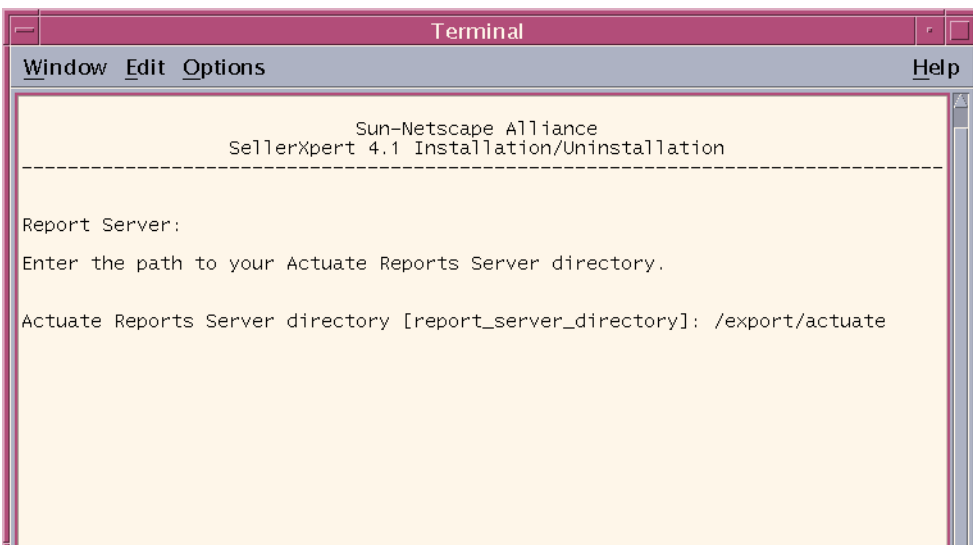
- 21.** The Setup Actuate Reports screen displays. Type **n** if you do not wish to configure Actuate with SellerXpert at this time. Type **y** if you do and the next two screens will display.



```
Terminal
Window Edit Options Help
Sun-Netscape Alliance
SellerXpert 4.1 Installation/Uninstallation
-----
Actuate Report Server:
Would you like to set up Actuate reports?
The Following screens will collect information required to configure
reports in SellerXpert.
NOTE: Actuate MUST be already installed.
Setup Actuate Reports [y/n] [n]: y
```

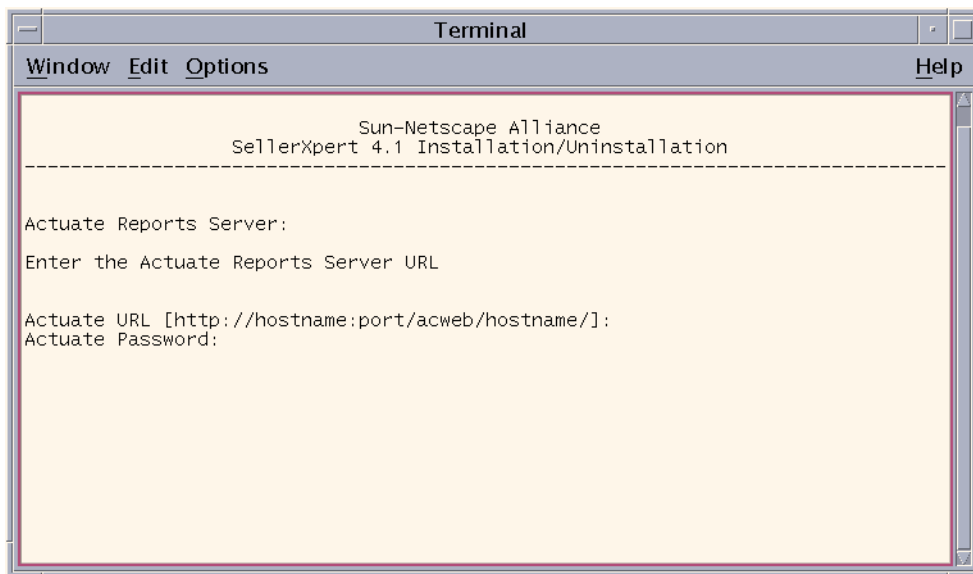
NOTE You must have already installed Actuate prior to installing SellerXpert.

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



```
Terminal
Window Edit Options Help
Sun-Netscape Alliance
SellerXpert 4.1 Installation/Uninstallation
-----
Report Server:
Enter the path to your Actuate Reports Server directory.
Actuate Reports Server directory [report_server_directory]: /export/actuate
```

23. At the next screen, enter the Actuate Server URL and the Actuate administrator password.



Allow approximately 30 minutes for SellerXpert to complete the installation.

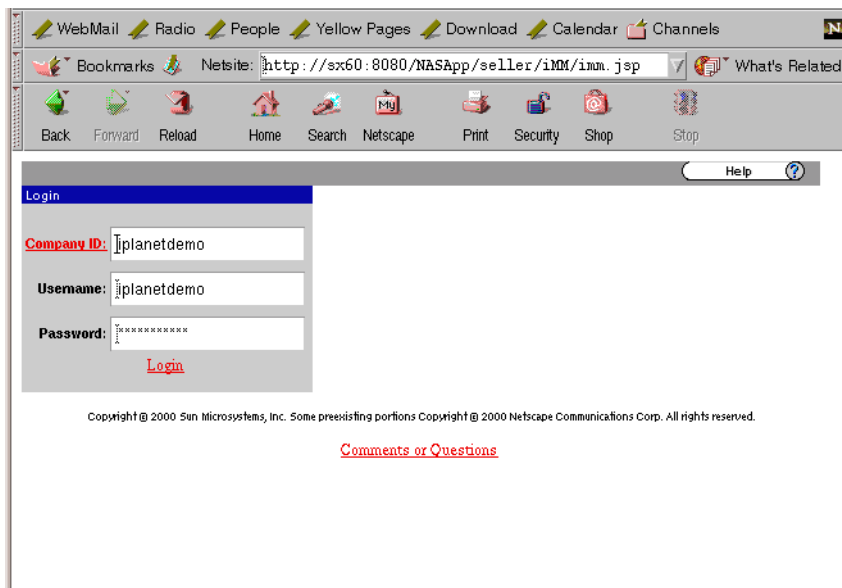
Creating Catalogs in Catalog Manager

To create catalogs in Catalog Manager:

1. Go to the URL:

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

2. The login screen displays.



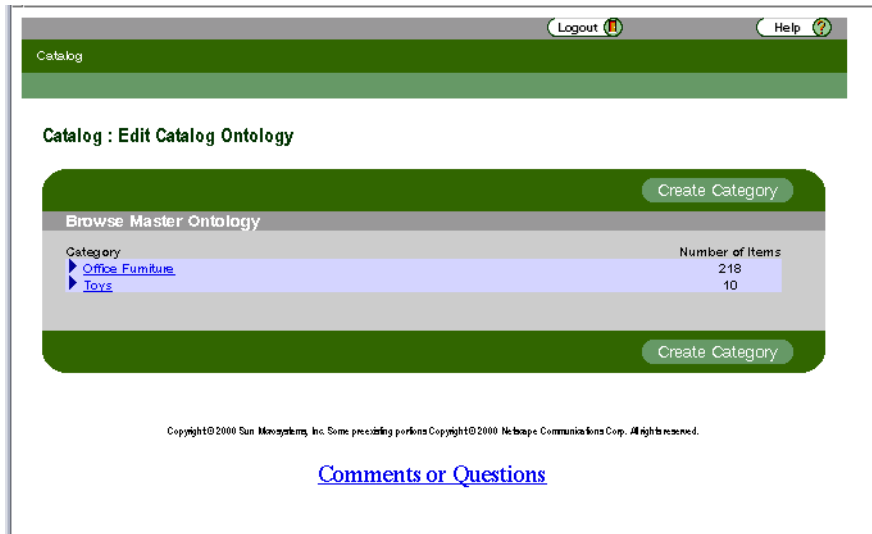
3. To enter the sample catalog data, type the following information in the fields shown:

Company ID: **iplanetdemo**

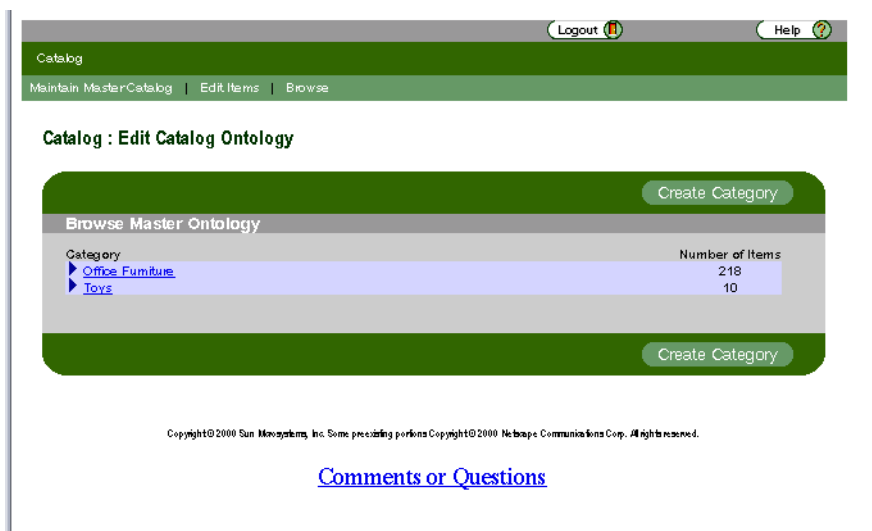
Username: **iplanetdemo**

Password: **iplanetdemo**

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



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



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

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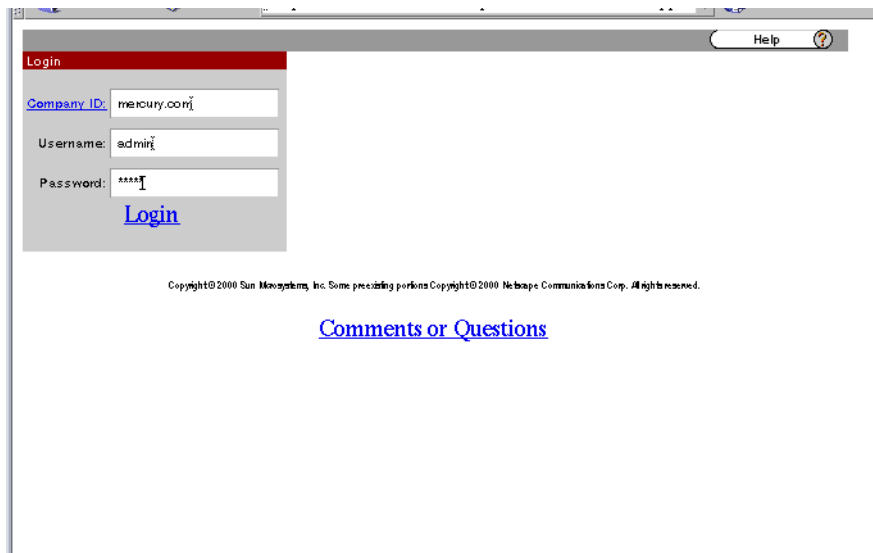
[Comments or Questions](#)

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

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[Comments or Questions](#)

9. The login screen displays.



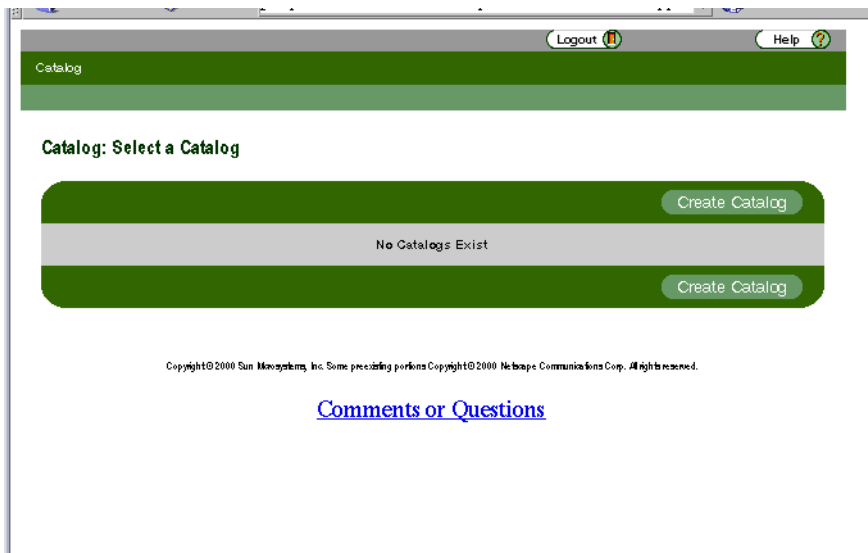
10. Type the following information in the fields shown:

Company ID: **mercury.com**

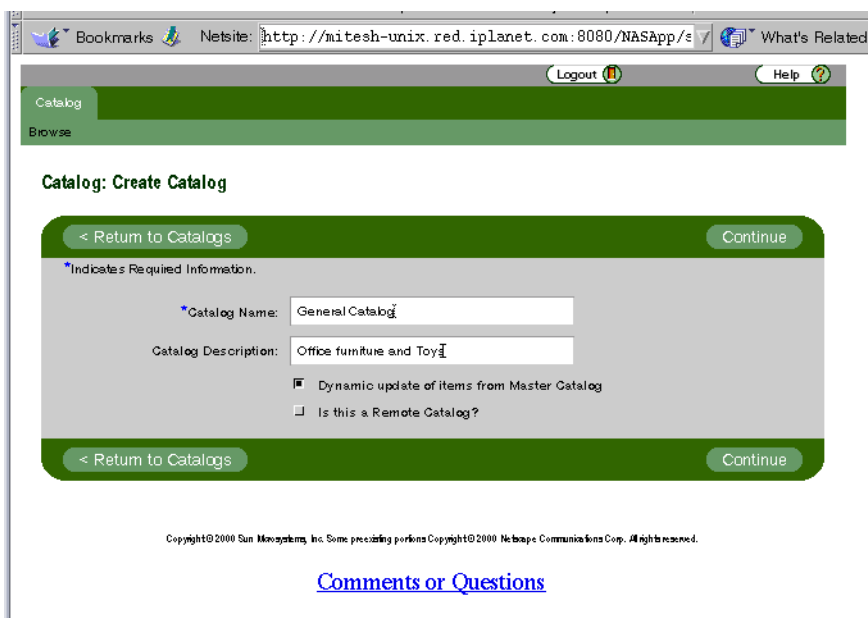
Username: **admin**

Password: **admin**

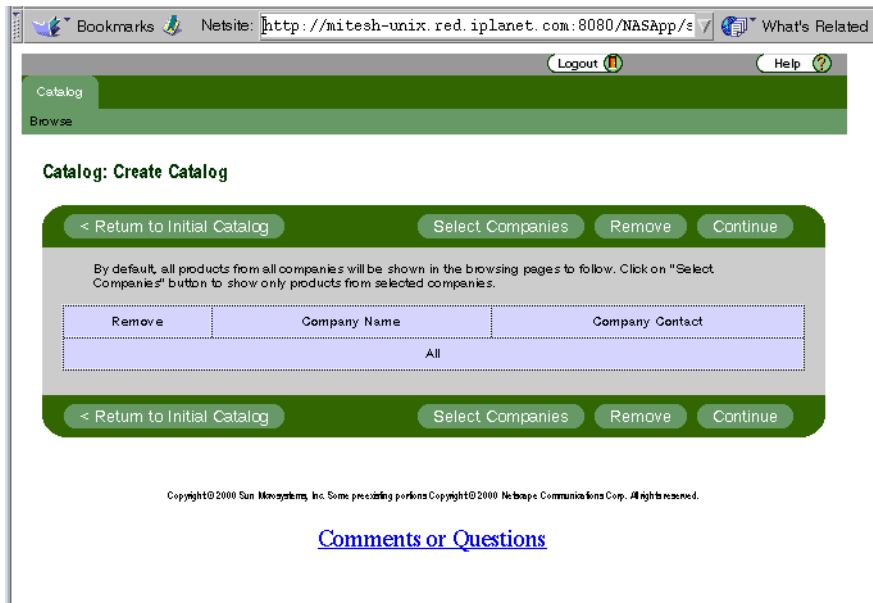
11. When the Create Catalog screen displays, click Create Catalog.



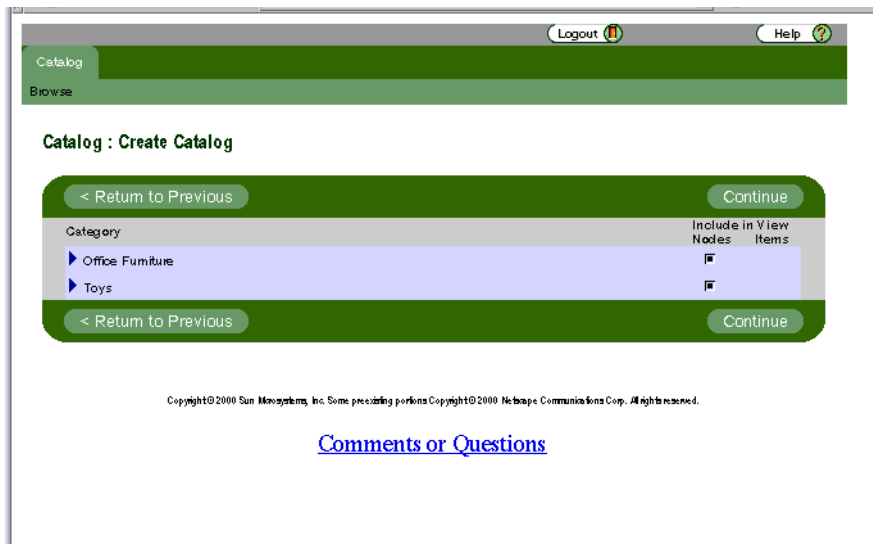
12. When this screen displays, enter the catalog name and description in the appropriate fields, then click Continue.



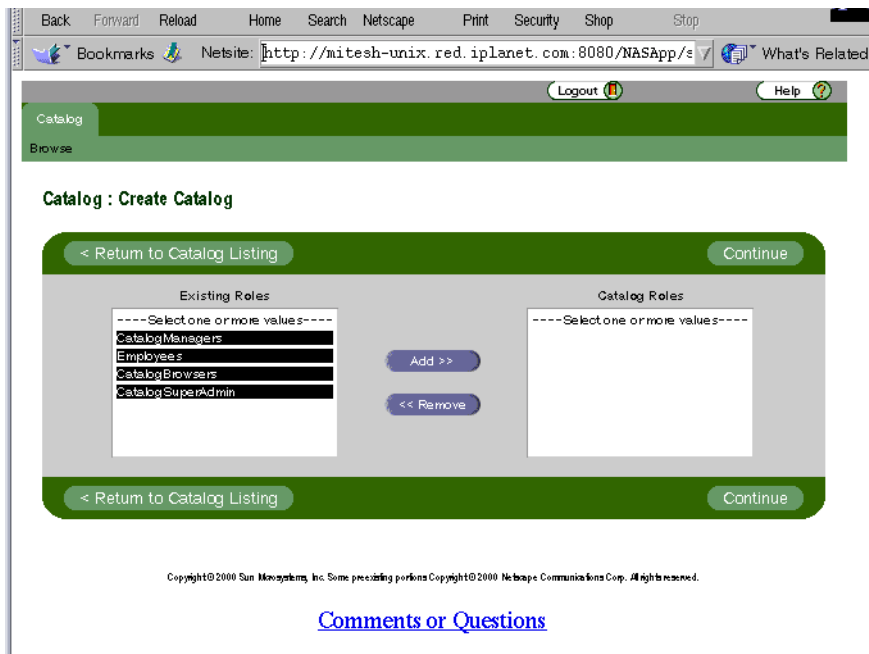
13. At this screen, click Continue.



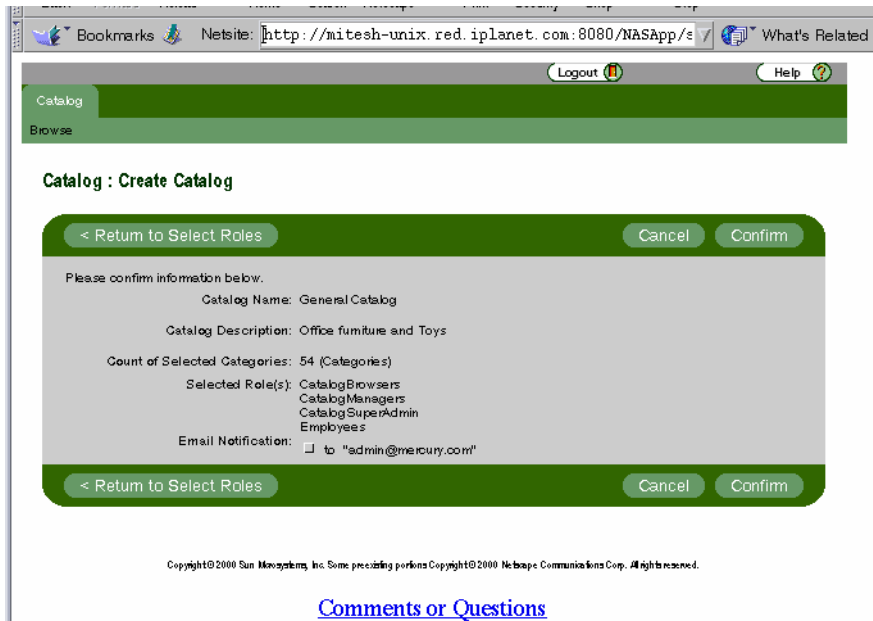
14. When this screen displays, click the two boxes under Include in Nodes, then click Continue.



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



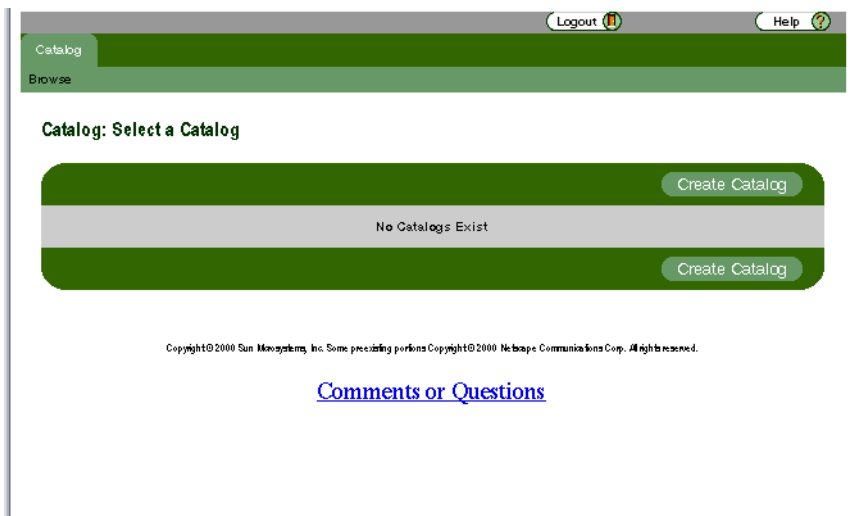
16. When this screen displays, click Confirm.



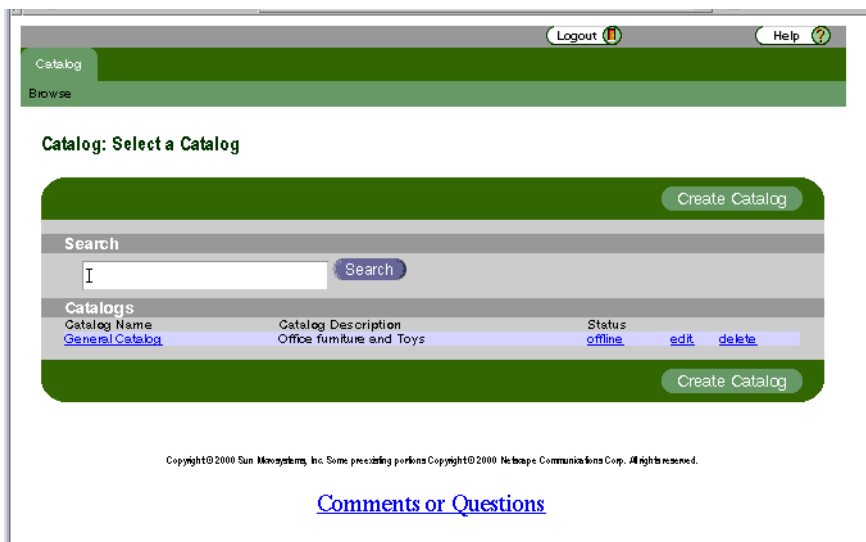
17. This message displays. Click OK.



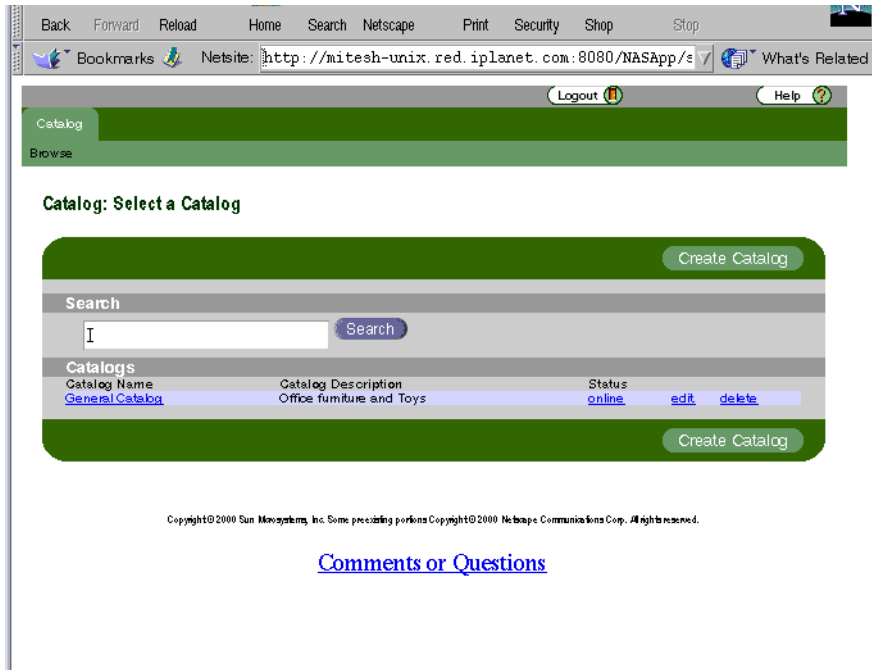
18. This screen displays when the system is finished creating the catalogs. Wait for the catalogs to be created (approximately 3 minutes), then click Browse.



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



20. When this screen displays, you will notice that the status has changed to online. The General Catalog is now available.



21. Click logout, located on the upper right side, to log out.

NOTE To create a catalog for a B2C organization, you must perform these catalog creation steps again, starting with Step 9.

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:

- iplanetecguid
- iplanetecparentorgguid
- uid
- sn
- cn

ou

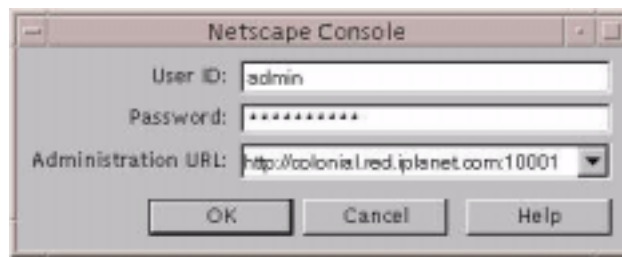
o

displayname

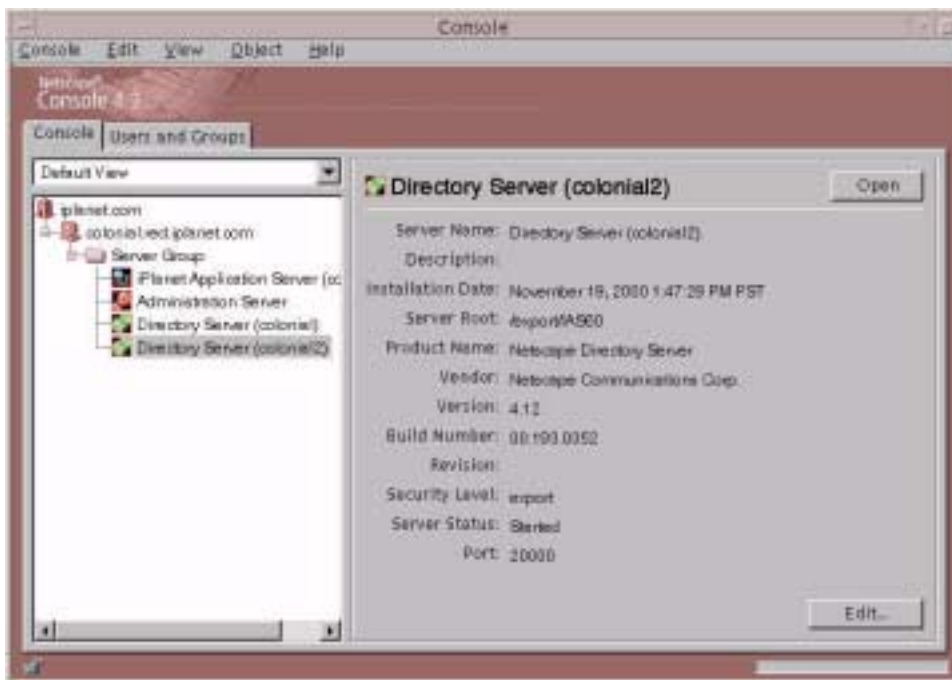
1. To create indexes, you need to execute startconsole from the IAS home directory.

```
% ./startconsole
```

2. The console screen displays.



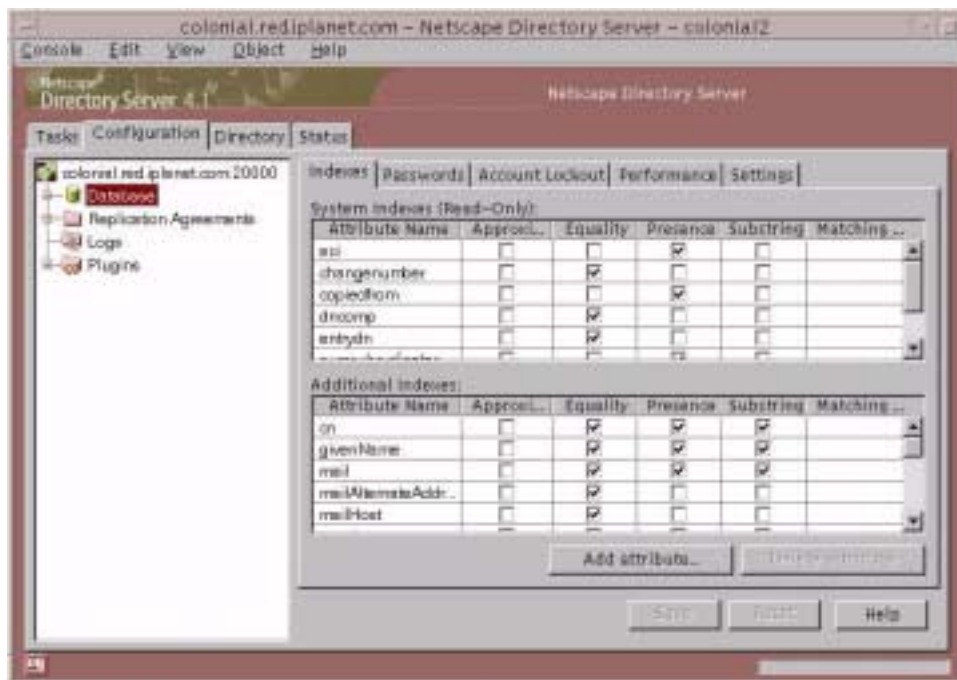
3. Enter the administrator password you gave when you installed iAS. Click OK.
4. Double click on the Directory Server that you created under the Server Group.



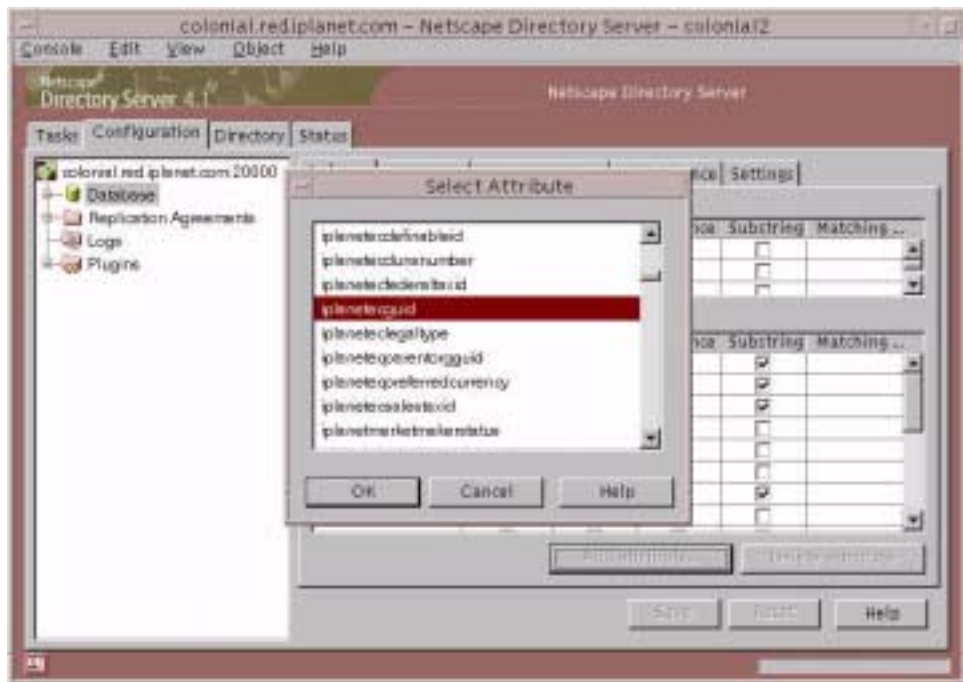
5. When this screen displays, select the Configuration tab.



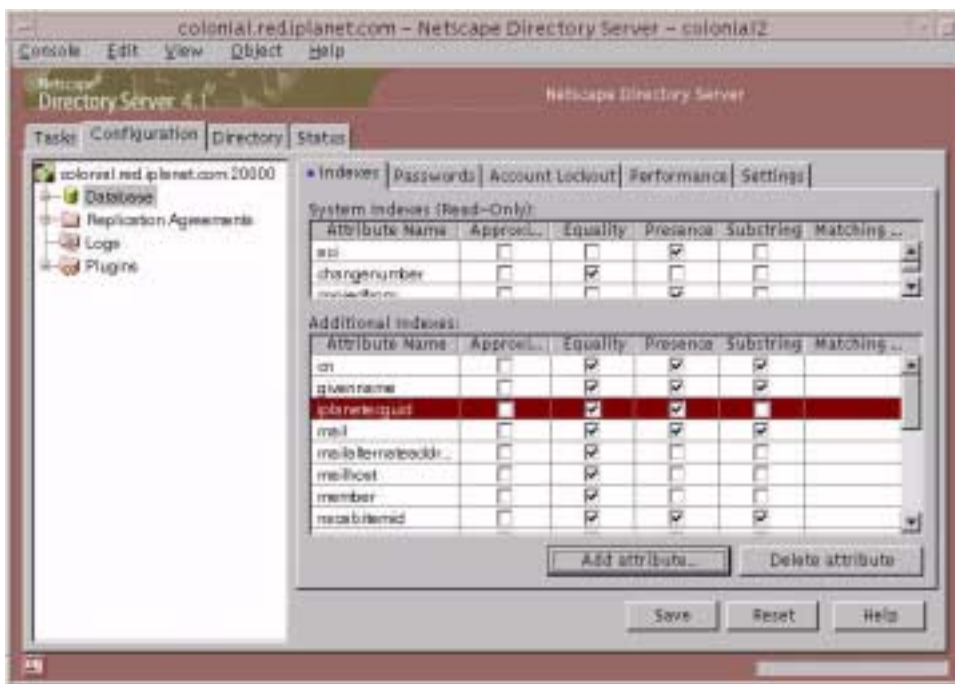
- When this screen displays, highlight Database, located on the left side. Click Add Attribute.



7. The Select Attribute window displays. Select the attribute.



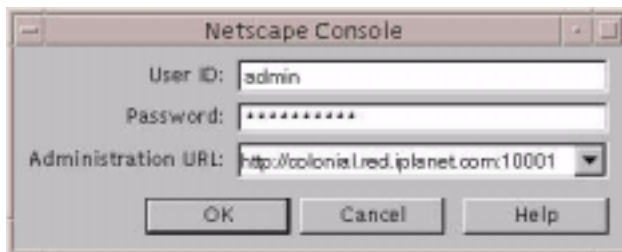
8. Select iplanetecguid and click OK.



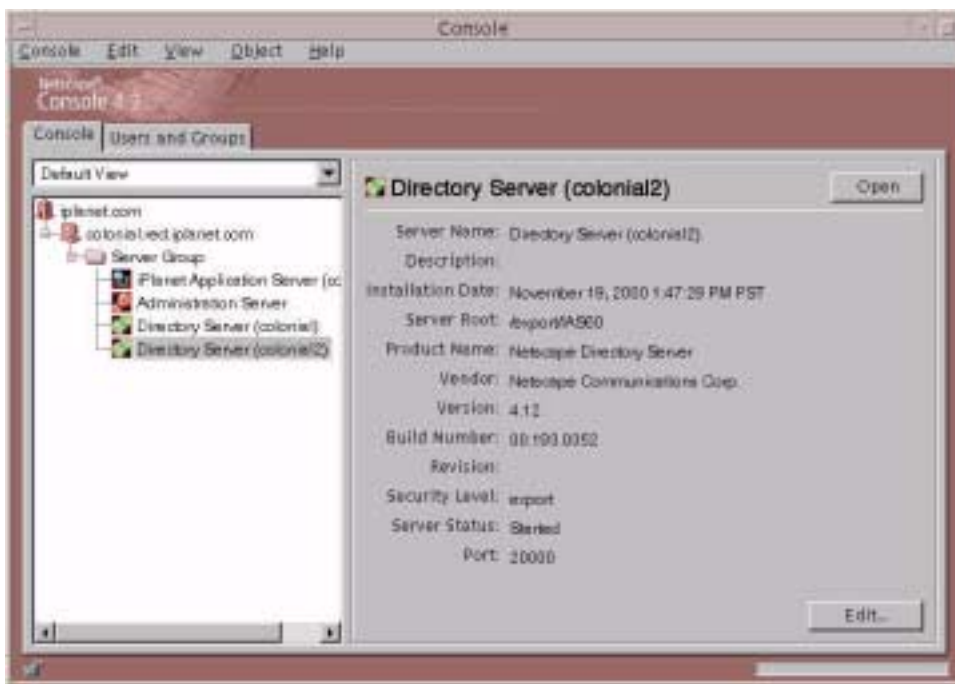
9. You will see that `iplanetguid` is now under the Additional Indexes with attribute Equality and Presence checked.
10. Perform this steps on all the attributes listed at the beginning of this procedure.
11. When you are finished, click Save and restart the server.

Set the Look-through Limit to Unlimited

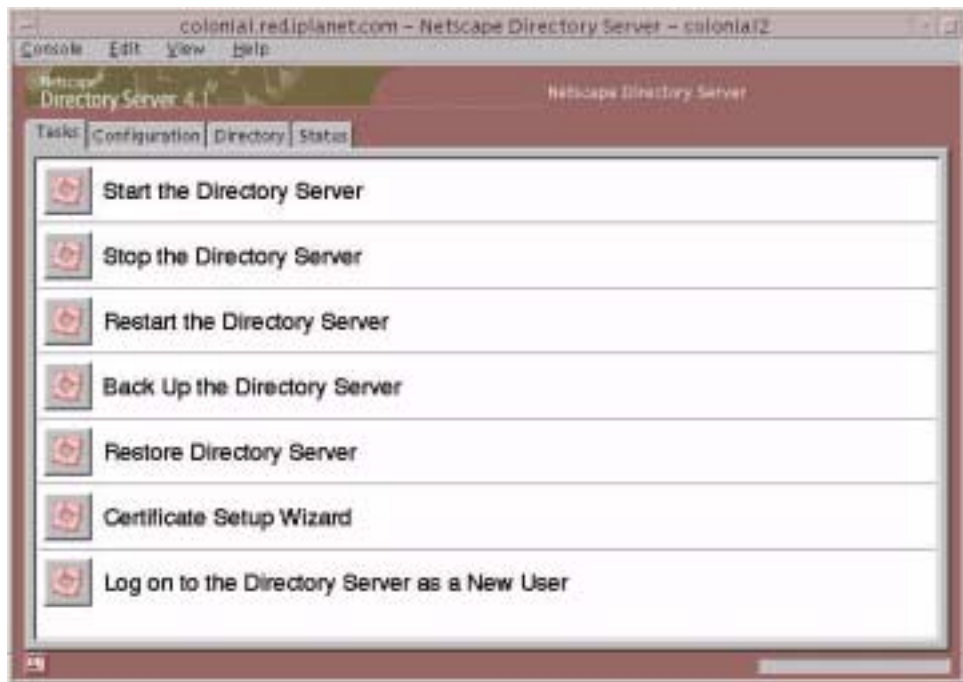
12. Enter `startconsole` from the IAS home directory.
13. The console screen displays.
14. Enter the administrator password you gave when you installed iAS. Click OK.



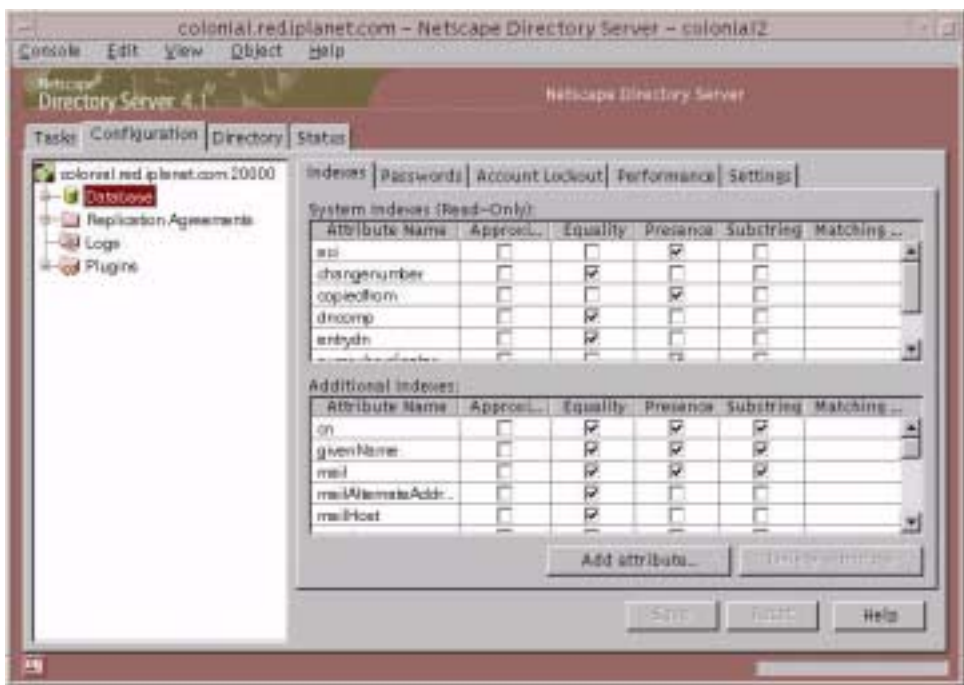
15. Double click on the Directory Server that you created under the Server Group.



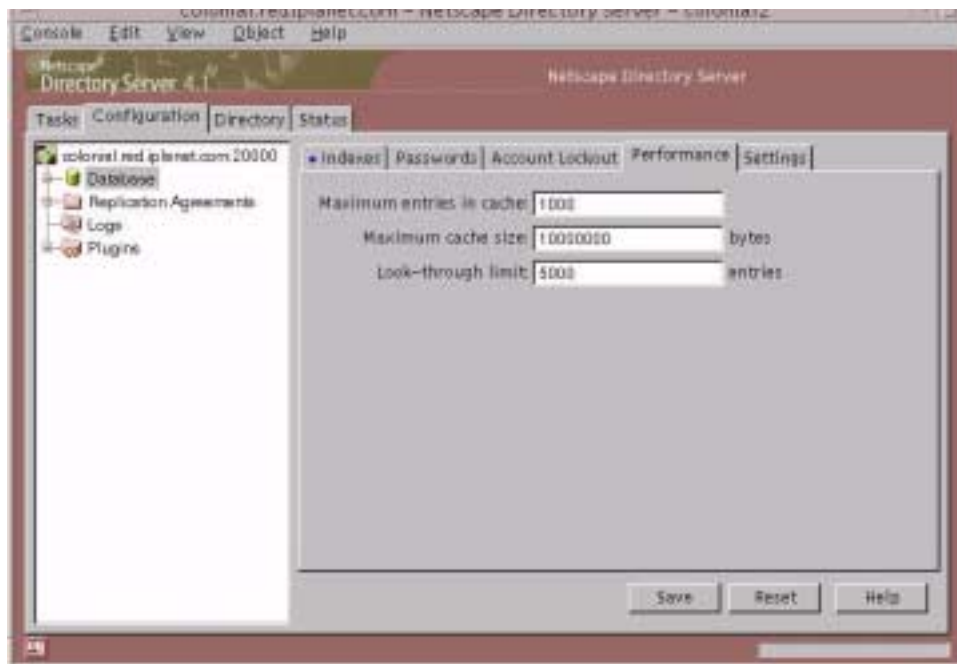
16. Select the Configuration tab and highlight Database on the left side.



17. Select the Performance tab.



18. The default value for “Look-through” limit is 5000. Change 5000 to -1.



19. Click Save.

20. Restart the server.

Preparing the Seed Data Storage

You need to install seed data for SellerXpert to work properly. If your SellerXpert 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 directory root to o=iplanet.com, as an example.
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:

- o Pick your favorite path for these configuration files, located in your SellerXpert installation directory:

path to `ias/seller/sample_data/directory_ldif/seller/iplanet.`

For example:

`/export/IAS60/seller/sample_data/directory_ldif/seller/iplanet.`

- o 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`

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

- o 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:

- o Use the schema.ldif file, located in your SellerXpert installation directory:

path to

`ias/seller/sample_data/directory_ldif/seller/iplanet/SellerXpertSchema.ldif.`

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

`# ldapmodify -h host -p port -c -a -D dirMgr -w password\`

`-f ./sellerxpertschema.ldif`

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

path to ias/seller/sample_data/directory_ldif/seller/iplanet

For example:

```
/export/IAS60/seller/sample_data/directory_ldif/seller/iplanet
```

5. Run the script loadSeedData.sh:

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

For example:

```
%./loadSeedData.sh myhost.iplanet.com 2000 o=iplanet.com
"cn=Directory Manager" password /export/IAS60
```

Alternately, you can run the script with an additional parameter of `WITH_SCHEMA` and skip steps 3 and 4:

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

NOTES This script should be run after installation of the product. Do not start the application.

This script tries to drop the user if the user already exists. Drop the corresponding user manually before running this script.

The tablespace must have already been created before running this script because it uses the tablespace to store all the data.

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 *SX_DATA* — populate SellerXpert 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/IAS60/seller/sample_data/impexp_files/  
. /create_schema.sh -r /export/IAS60/ -u sx/sx -d sxdb -s  
system/manager -o $ORACLE_HOME -t TS01 -i TS02
```

where:

`/export/IAS60/` is the *IAS Root*, *sx* is the account to be dropped or created (the schema and data are loaded into this), *sxdb* is the Oracle database instance name, and *TS01* and *TS02* are the tablespaces in the Oracle data.

8. The script can be found at:

`IAS-Root/seller/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 SellerXpert 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, YourOrg. See the *Administrator's Guide* for information on how to create an organization.
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. Log out and stop the application:

```
KIVAes.sh stop
```

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

```
KIVAes.sh start
```

6. Log into the Admin interface as SuperAdminUser.

For example:

```
YourOrg/SuperAdminUser/SuperAdminPassword
```

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

```
IAS-ROOT/seller/schema/db/seller/cleardb.imp
```

(This file clears the policy tables and objects.)

```
IAS-ROOT/seller/schema/db/seller/role.imp
```

(This file imports roles.)

```
IAS-ROOT/seller/schema/db/seller/policy.imp
```

(This file imports policies.)

Do not delete this super administrator unless you have other users with superadmin privileges.

Configuring SellerXpert for Secure Transfer of Sensitive Data

In SellerXpert, sensitive data such as user passwords and credit card information is transferred back and forth between the client browser and the backend SellerXpert servers over http protocol. Most of the web servers support Secure Sockets Layer (SSL), an industry standard protocol encryption of data transmitted over http. SellerXpert has been designed to use this feature of web servers whenever needed.

While installing SellerXpert, you may chose to use a web server configured to support SSL. In that case, all data transfers between client browsers and SellerXpert servers will be encrypted and are, therefore, secure.

Because using SSL adds a performance overhead, SellerXpert has been designed to switch to SSL mode only when dealing with more sensitive data, then to switch back to normal (non-SSL) mode.

The following sections provide instructions for configuring SellerXpert to switch between SSL and non-SSL mode.

Preparation

Install and configure an instance of web server in secure server mode. Refer to Web Server documentation for instructions.

NOTE Both secure and non-secure web server instances must be configured to use the same application server cluster (for session sharing).

Configuring

To configure the secure/non-secure mode of data transfer:

1. Redeploy the SellerXpert web application file (seller.war) with the appropriate domain information. This is done running a script named `configureSecureMode`. To run this script, you need to have IAS_HOME and iAS administrator user ID, password, port and domain information. This information was used during SellerXpert installation. Also, make sure you enter all parameters while running `configureSecureMode`.
2. Make sure you enter all the parameters while running `configureSecureMode`. You will be prompted to enter domain information as follows:

Domain: The domain to which the cookie is sent back from the web browser. By default, the domain of the URL that sets the cookie is assumed to be the domain that the cookie is sent back to. Refer to *iPlanet Application Server 6.0 Administration and Deployment Guide* for more information.

To run `configureSecureMode`:

```
% cd $IAS_HOME/seller/install
% ./configureSecureMode
```

3. Once that step has been done successfully, edit the `sellerInfo.ntv`, located in `$IAS_HOME/seller/seller/config`.

The configuration file `sellerInfo.ntv` has the following default parameters:

```
"transition_enabled" Bool "false"

"secure_server" NTV {
"host" Str "%REPLACE_BY_SECURE_SERVER_HOST%",
"port" Int "%REPLACE_BY_SECURE_SERVER_PORT%",
},
"non_secure_server" NTV {
"host" Str "%REPLACE_BY_NON_SECURE_SERVER_HOST%",
"port" Int "%REPLACE_BY_NON_SECURE_SERVER_PORT%",
},
```

A combination of systems can be configured based on the above parameters in the `sellerInfo.ntv`.

Example 1: Both `http` and `https` running on standard ports (secure 443 and non-secure 80).

1. Change:

```
"transition_enabled" Bool "true"
```

2. Remove:

```
"secure_server" NTV {
"host" Str "%REPLACE_BY_SECURE_SERVER_HOST%",
"port" Int "%REPLACE_BY_SECURE_SERVER_PORT%",
},
"non_secure_server" NTV {
"host" Str "%REPLACE_BY_NON_SECURE_SERVER_HOST%",
"port" Int "%REPLACE_BY_NON_SECURE_SERVER_PORT%",
},
```

Example 2: Both `http` and `https` running on non-standard ports (example secure 8443, non-secure 8080) on the same server (example `hostname.com`).

1. Change:

```
"transition_enabled" Bool "true"
```

2. Edit:

```
"secure_server" NTV {  
  "port" Int "8443",  
},  
  
"non_secure_server" NTV {  
  "port" Int "8080",  
},
```

Example 3: Both http and https running on non-standard ports on different servers (example: non-secure hostname1.com:8080 and secure hostname2.com:8443).

1. Change:

```
"transition_enabled" Bool "true"
```

2. Edit:

```
"secure_server" NTV {  
  "host" Str "hostname2.com",  
  "port" Int "8443",  
},  
  
"non_secure_server" NTV {  
  "host" Str "hostname1.com",  
  "port" Int "8080",  
},
```

Installing Additional Software

Additional software must be installed to operate SellerXpert correctly. Some of this software is not included in the SellerXpert CD and must be purchased separately. See the “Requirements” in Chapter 1 for a list of software included on the SellerXpert installation package.

The following sections are contained in this chapter:

- Installing ECXpert
- Deploying the Portal Channel
- Installing Reuters™ Multi-Currency Live Feed

Installing ECXpert

ECXpert handles the exchange of business documents and messages between SellerXpert and legacy systems. The primary ECXpert services used by SellerXpert are data transmission, a variety of communications protocols, and document tracking.

See the ECXpert documentation for installation instructions.

Deploying the Portal Channel

All the files related to portal integration have been packaged along with SellerXpert and they will be present in the `SERVER_ROOT/seller/seller/BXPORTAL` directory, which is referred to as `PORTAL_ROOT` here, 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 the portal server is installed.

To deploy the SellerXpert portal channel and other functionality, the following steps are required:

- Deploying the Authentication Modules
- Deploying the Channels
- Adding the Channels to the Available Channels List
- Configuring the Portal Server
- Adding the Channels to the User Profile
- Anonymous Logon to Portal and Enabling SellerXpert Channel to Anonymous Portal Users
- Configuring Portal Server URLs for SellerXpert
- Miscellaneous Tips

Deploying the Authentication Modules

SellerXpert integration in portal relies on certain SellerXpert-specific attributes that are set up in the user profile when a new user is created. This changes some of the template files used by the portal authentication module to facilitate creation of the specific attributes. You will need to perform the following steps:

1. Shut down your portal server:

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

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

4. Back up the template for UserInfo:


```
% cd /etc/opt/SUNWips/desktop/default/iwtUserInfoProvider
% mv edit.template edit.template.orig
```

5. Add a new component for loading buyer-specific attributes for the user during authentication:

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

6. Start up the portal server:

```
% cd <portal-server-installation-directory>
% cd SUNWips/bin
% ./ipsserver start
```

7. Import the component:

```
% cd <portal-server-installation-directory>
% cd SUNWips/bin
% ./ipsadmin -import /etc/opt/SUNWips/xml/bxAuth.xml
```

If you are successful, the following message displays: Operation Completed Successfully.

To verify success, access the domain that you created after you installed portal server. On the logon page for that domain, click **New User**. You will see a form with some SellerXpert-specific fields, such as SellerXpert User ID. Complete the form and register. If the submission proceeds correctly, a disclaimer page, or an error, displays on the browser page.

Deploying the Channels

Add the SellerXpert-related channels to the portal server, then configure them as follows:

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

```
% cp PORTAL_ROOT/config/sellerxinfo.properties
/etc/opt/SUNWips/config
```

2. Edit the entries in the `sellerxinfo.properties` file and define all the SellerXpert-related URLs appropriately.

NOTE Create the configuration directory before copying.

3. Copy the XML descriptors for the channels:

```
% cp PORTAL_ROOT/xml/iwtSSOSellerXProvider.xml
<portal-server-installation-directory>/SUNWips/sample/desktop/xml/
```

4. Edit both XML descriptors to reflect the location of the properties file using your preferred text editor:

- A. Look for an attribute called fileLocation.
- B. Change the value for this attribute from "/export" to the location of the properties file.
- C. Save and close the descriptors.

NOTE Keep the sellerxinfo.properties file in /etc/opt/SUNWips/config ONLY.

5. Import the XML descriptors using ipsadmin:

```
% cd <portal-server-installation-directory>
% cd SUNWips/bin
% ./ipsadmin -import
<portal-server-installation-directory>/SUNWips/sample/desktop/xml/
iwtSSOSellerXProvider.xml
```

After importing each of the descriptors, the following message displays:
Operation completed successfully.

6. 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/
```

7. Edit the jvm12.conf file in the webserver config directory to include the servlet directory in the classpath of the webserver:

```
% cd
<portal-server-installation-directory>/netscape/server4/https-<w
ebserver>/config
```

8. Edit the `jvm12.conf` file by locating the `jvm.classpath` variable and appending the following:

```
<portal-server-installation-directory>/SUNWips/public_html/servlet:
<portal-server-installation-directory>/SUNWips/public_html.
```

Adding the Channels to the Available Channels List

Add the channels to the available channels as follows:

1. Access the portal server admin console by entering the following URL:
`http://<machinename>:<port>/console.`
2. Log on as root.
3. Click the Manage Domains link and select the domain that you created.
4. Expand the Applications link and select Desktop. The Available and Selected Providers list windows appear.
5. In the Channel Name text box, type:
`iwtSSOSellerXProvider`
6. In the Class Name textbox, type:
`com.iplanet.portalserver.providers.buyerx.SSOSellerXProvider`
7. Click Add, then click Submit to update the profile server.
8. Click Logout to log out of the console.

Configuring the Portal Server

Configure the portal server as follows:

1. Verify that the portal server is shut down.
2. Edit the `obj.conf` of the portal webserver to add a redirect:

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

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

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

Because the portal installation runs on a different web server, all SellerXpert-related images cannot be seen when you do a single sign on through portal. A workaround is to create a link in the portal server docroot directory to the images directory on the SellerXpert web server.

Adding the Channels to the User Profile

Configuration is now complete. Test to see if you can view the channels as follows:

1. Log into the portal as a user by accessing the following URL:

```
http://<machine-name>:<port-number>/login?domain=/<domain-name>
```

NOTE If you are a new user, click New User.

2. After you log on, select the Content link and add the listed SellerXpert channel.

Anonymous Logon to Portal and Enabling SellerXpert Channel to Anonymous Portal Users

Anonymous logon to portal means you are allowed to enter portal without registering. iPlanet Process Server 3.0 SP2 provides the option to enable the guest entry.

The following link provides the steps for installing SP2:

```
http://docs.iplanet.com/docs/manuals/portal/30/REL_NOTEiPS3SP2.h  
tml
```

Follow the steps at this link using an anonymous authentication section (which helps you to go directly to the desktop page), then follow these steps:

1. Log on to the portal server as admin at the following location:

```
http://<host.domain.subdomain>:port/console)
```

2. Add the required channel to the anonymous user.

3. Provide the root user ID and password.
4. Click Manage Domains and expand your domain link.
5. Expand the defaultRole link.
6. Expand the application link.
7. Click the desktop link.
8. Add the channel name (iwtSSOSellerXProvider) and classname (com.ipplanet.portalserver.providers.buyerx.SSOSellerXProvider) in the respective text fields.
9. Move the added channel to the "Selected Channels" list box.
10. Submit the changes.
11. Log out of admin.
12. Enter portal as an anonymous user. The channels that have been added under the anonymous user displays.

Configuring Portal Server URLs for SellerXpert

As a part of integrating portal server and SellerXpert, SellerXpert needs various URLs of portal server to communicate and transfer information to the portal server.

These URLs are added in the NTV file \$IAS_HOME/seller/seller/config/membership/appInfo.ntv. Modify the NTV file by replacing <portalserver-hostname>:<port> with the actual value. After changing the values, the NTV file should be:

```
"portal" NTV {
    "logout" Str
    "http://buyer04.india.sun.com:8080/DesktopServlet",
    "URL" Str
    "http://buyer04.india.sun.com:8080/servlet/PortalUpdater",
    },
```

Miscellaneous Tips

If both SellerXpert and portal are installed on the same machine, they must have unique port numbers.

If you restart the portal server, it stops the LDAP process of SellerXpert; therefore, you need to explicitly restart the SellerXpert LDAP process.

Installing Reuters™ Multi-Currency Live Feed

With this product, 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 can 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, right click 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 SellerXpert CD \$SX_HOME/currconv directory.

1. Contact Reuters to get the license.
2. Configure the 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 the getData.csh script (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 $SX_HOME/billxpert_env.csh (NEED MODIFY FOR SX4.1)
#####

# Please change the values accordingly
#####

setenv DATABASEPROPFILE $SX_HOME/currconv/database.properties
setenv REUTERS_PROP $SX_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

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

Shutting Down, Starting and Uninstalling SellerXpert

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

The following sections are contained in this chapter:

- Shutting Down SellerXpert
- 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 SellerXpert
- Uninstalling SellerXpert

Shutting Down Procedures

Shutting Down SellerXpert

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

Shutting Down Directory Server

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

Shutting Down iPlanet Application Server

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

```
% IAS-ROOT/stop-admin
```

Shutting Down iPlanet Web Server

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

```
% IWS-ROOT/https-instance-name/stop
```

Starting Procedures

Starting iPlanet Web Server

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

```
% IWS-ROOT/https-instance-name/start
```

Starting iPlanet Application Server

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

```
% IAS-ROOT/start-admin
```

Starting Directory Server

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

Starting SellerXpert

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

Uninstalling SellerXpert

1. Make sure iAS has stopped:

```
% KIVAes.sh stop
```

2. Use the uninstall program:

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

3. At the prompt, select option 5.

Glossary

access control Set of software mechanisms that limit and control access to host systems and applications.

access control list A list of users and their permitted access rights.

acimport Obsolete term. *See* Import utility.

actor An object (user or process) or group of objects that wants to perform an action; used for access control. *See also* member.

additional information field (AIF) An additional field on an order line item.

administrator A SellerXpert user who is authorized to administer the SellerXpert system. *See also* orgadmin, selfadmin, superadmin.

Application Program Interface (API) A set of routines, protocols, and tools for building software applications.

attributes Characteristics that define classes and subclasses for items in a catalog. For example, attributes for an envelope could include size, paper weight, and color. *See also* catalog schema.

authentication The process of verifying the identify of a particular actor (user or process). That is, determining who that particular actor is.

authorization The process of verifying the actions allowed for a particular actor (user or process). That is, determining what that particular actor is allowed to do.

business rule A configurable, generalized statement that allows administrators to control the flow and behavior of SellerXpert.

buyer catalog A view of a master catalog that selectively shows categories and items in the master catalog.

capture The process of collecting transactions that are ready for settlement. These captured transactions are submitted to a credit card processor for payment.

catalog A collection of products that can be ordered electronically from a database repository. The SellerXpert administrator sets up catalogs on an organization level, after which SellerXpert users are assigned access. *See also* product, SKU.

catalog manager import utility A SellerXpert utility for importing bulk catalog data offline using batch processing.

catalog ontology A catalog structure made up of product categories that contain product attributes associated with the categories.

catalog roles A set of privileges that allow a user to perform certain actions in SellerXpert. Catalog roles are SellerXpert superadmin, SellerXpert orgadmin, SellerXpert user, and supplier.

catalog schema A hierarchical data structure that defines classes and subclasses for products in a catalog. In the graphical interface, these classes appear as product categories. Parameters and attributes further define catalog items.

category A node in the catalog master ontology. A category contains attributes that are associated with the category. *See also* attributes.

charge A modification to the default pricing on a price list; usually accompanied by a cost-reducing condition such as prompt payment. *See also* DCAP.

conversion table A table that is used to convert measurable units within a class. *See also* unit of currency, unit of measure.

currency conversion value *See* unit of currency.

customer ID A unique identification number for a customer organization.

Data Universal Numbering System (DUNS) A unique nine-character organization identification number assigned by Dun and Bradstreet.

DCAP *See* discounts, charges, allowances, promotions.

discounts, charges, allowances, promotions (DCAP) The various modifications that the SellerXpert administrator can make to the pricing.

discount A modification to the default pricing of an item that reduces the default selling price of an item by a specified sum or percentage, usually accompanied by a cost-reducing condition such as prompt payment. *See also* discounts, charges, allowances, promotions (DCAP).

DUNS *See* Data Universal Numbering System (DUNS).

ECXpert An iPlanet product; electronic commerce software that transmits business documents and messages between SellerXpert servers and other servers.

EDI *See* Electronic Data Interchange (EDI).

Electronic Data Interchange (EDI) A paperless trade exchange system that replaces common business forms such as purchase orders, shipping forms, invoices, and so on, with a computer-based communications and record keeping system.

extensible markup language (XML) An extensible markup language, consisting of text interspersed with a few formatting tags, used to create documents on the World Wide Web. *See also* HyperText Markup Language (HTML).

freight charges The actual charges for a shipment.

Freight on Board (FOB) Specifies the location where title to the goods passes from the supplier to the buyer. For example, upon leaving the warehouse, or upon arrival at the destination. For FOB terms, the supplier pays the freight charges to the specified location and the buyer pays any charges beyond the FOB location.

freight terms An agreement between buyer and supplier companies on how an order should be taxed and how the carrier is to be paid. Freight terms can be applied to an entire order or to a group of lines that have the same freight terms. *See also* shipping terms.

FOB *See* Freight on Board (FOB).

graphical interface A point-and-click method for using a software product. SellerXpert graphical interfaces include the graphical admin interface and the graphical user interface.

graphical Admin interface A graphical interface that allows the SellerXpert administrator to perform administrative tasks. Also called the Admin interface.

graphical User interface A graphical interface that allows the SellerXpert user to perform authorized user tasks. Also called the User interface.

group *See* user group.

HyperText Markup Language (HTML) A markup language, consisting of text interspersed with a few basic formatting tags, used to create documents on the World Wide Web. *See also* extensible markup language (XML).

Import utility SellerXpert utility used for applying bulk data changes to system information. The Import utility provides both a graphical interface and a command-line interface.

import data file The format used by the Import utility to load data changes into the SellerXpert database. Each import data file consists of comment lines, command lines, attribute lines, and body lines that specify the data to be changed.

inventory Quantity on hand for an item in a catalog. *See also* product, SKU.

Lightweight Directory Access Protocol (LDAP) A network protocol that extracts information from a hierarchical directory, such as a user name, email address, security certificate, and other contact information. An LDAP repository has its own authentication and access control functions.

locale A particular country or region that uses different settings for language, number and date formats, graphics, and page layout (such as left to right or right to left).

localization The process of modifying SellerXpert for a specific international market, which includes translating the graphical interface, resizing dialog boxes, customizing features (if necessary), and testing results to ensure that SellerXpert works properly in the new locale. *See* locale.

master catalog The total of all supplier catalogs.

master ontology *See* catalog ontology.

measurement conversion value *See* unit of measure.

member A user or process that has permission to access particular functions, resources, and data.

multi-currency A feature that allows for multiple currencies within one system or within one order.

multi-divisional organization An organization that uses admin and end-user privileges and business rules based on organizational units and groups.

multi-locale A feature that allows for multiple locales to be in use within one SellerXpert system. Multi-locale can apply to date value (for example, product description) as well as to text messages. *See also locale.*

multi-org A feature that allows for multiple organizations within one SellerXpert system.

net price Price of a purchase order after discounts and charges have been applied. *See also DCAP.*

ontology *See catalog ontology.*

order process The SellerXpert process of passing an order through a series of steps, ending in a fulfillment.

organization A business entity that contains one or more organizational units. *See also organizational unit.*

orgadmin A SellerXpert administrator who can update information for his/her organization. An orgadmin cannot update information in sub-organizations. *See also role.*

organizational unit A partition of an organization that enables the SellerXpert administrator to set member privileges and approval parameters based on organization structure and rules. *See also member.*

parametric search Electronic search for items matching specific search parameters.

payment method The method that a customer uses to pay for an order. Payment methods can apply to an organization, an individual, or a group.

payment terms An agreement between buyer and supplier organizations on how the buyer will pay the supplier for purchases.

permissions An electronic mechanism for controlling access to resources by screening attempted access against preset parameters.

pricing adjustment A change to the price of a particular product after the customer selects the item. *See also* DCAP, net price.

primary account number (PAN) A unique number identifying a customer for a payment system. This number is encrypted for security and is only visible to the customer and the acquiring bank.

product A category for an item contained in a catalog. A product is part of the inventory, or stock, of a supplier organization. *See also* SKU.

order template A special type of order that can be used to create another order. A order template can contain actual items that are repeatedly ordered, or other types of information such as default billing and shipping.

role A set of privileges that allow a user to perform certain actions in SellerXpert. The roles are superadmin, orgadmin, and selfadmin. *See also* superadmin, orgadmin, selfadmin, catalog roles.

rule *See* business rule.

Secure Sockets Layer (SSL) A protocol developed by Netscape that uses encryption to transmit secure documents on the internet. Web pages using an SSL connection start with https instead of http.

security policy An organization-defined methodology for protecting data from access by unauthorized people or processes, which include logging and tracking system events.

selfadmin A SellerXpert user who can update his/her own information. *See* role.

seller An organization that owns and sells products through a catalog. Also known as merchant and supplier organization.

shipping method A specification on how merchandise is shipped from a supplier organization to a buyer organization. For example, Federal Express Overnight or UPS Next Day.

shipping terms An agreement between buyer and supplier companies on how an order should in to be shipped. *See also* freight terms.

SKU *See* stock keeping unit (SKU) code.

SSL *See* Secure Sockets Layer (SSL).

stock keeping unit (SKU) code A unique alphanumeric code that subdivides a product into more specific categories. For example, a pen product can be subdivided by color, each color having its own SKU code. A catalog item cannot be sold without an SKU code. *See also* catalog, product.

superadmin A SellerXpert administrator who can update information across all organizations. *See also* role.

TAXWARE A third-party software product that SellerXpert can use for calculating taxes.

unit of currency Indicates the currency conversion (such as USD to Euro, franc to lira, and so forth) to use for calculating the price of a product. Only one currency conversion unit can be specified for an order.

unit of measure Indicates the measurement conversion (such as centimeter to inch, liter to quart, kilogram to pound, and so on) to use for a items in an order.

users People who have access to SellerXpert. In general, SellerXpert users have privileges to create and submit orders; some users also have administrative privileges. Also known as people. *See also* members.

user group A collection of users within a given organizational unit. In some ways, user groups resemble organization units, but organizational units have stricter polices regarding user membership.

vendor *See* seller.

XML *See* extensible markup language (XML).

Index

A

- Actuate, configuring for SellerXpert, 104
- Administration Server, overview of, 52
- administrator, assumptions about, 11

C

- Catalog Manager, creating catalogs in, 106
- CD-ROM contents, 92
- Console
 - overview of, 52
 - starting, 87

D

- database, enabling with iAS, 79
- db2, configuring with iAS, 83
- Directory Server
 - creating instance for, 87
 - overview of, 52
 - shut down procedures, 150
 - starting procedures, 150

E

- EXCpert, installing, 135

H

- Help
 - how to use, 9

I

- indexes, creating membership, 116
- Informix, configuring with iAS, 82
- installation checklist, 12
- internationalization, enabling support, 73
- iPlanet Application Server (iAS)
 - installing, 61
 - overview of, 51
 - serial number, entering, 74
 - shut down procedures, 150
 - starting procedures, 150
- iPlanet Web Server (iWS)
 - installing, 52
 - shut down procedures, 150
 - starting procedures, 150
- iPlanet, customer support, 10

L

LDAP

- creating instance for, 87
- overview of, 52

M

- membership, creating indexes, 116
- multi-currency live feed (Reuters), installing, 142

N

- network port number, 88

O

- online help, 9

Oracle

- configuring with iAS, 80
- creating an instance, 30
- hardware requirements of, 19
- installing database, 19

P

- product key, entering, 74

R

requirements

- hardware, 13
- software, 14
- system, 13

- resource manager, configuring, 83

- Reuters, installing multi-currency live feed, 142

roadmap, 16

- root DN password, 88

S

- sample data, 92

seed data

- installing, 130
- preparing storage for, 127

SellerXpert

- CD-ROM contents, 92
- documentation set, 9
- installing software, 93
- shut down procedures, 149
- starting procedures, 151
- uninstalling, 151

- staging area, 91

- Sybase, configuring with iAS, 82

W

website

- for iPlanet customer support, 10