

Installation Guide

iPlanet BuyerXpert 4.5

Version 4.5

June 2002

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About This Document

The *iPlanet BuyerXpert 4.5 Installation Guide* provides information on how to install BuyerXpert and all of the enabling software.

This preface contains the following sections:

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

Audience

The audience for this document is the BuyerXpert installer.

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

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

- Internet browsers

What's in This Document

The following table summarizes what each chapter covers.

Table 1 Chapter Summary

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

Documentation Conventions

This document uses the following conventions:

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

The Document Online

You can find this document online in Portable Document Format (PDF) and HTML format at the following web site:

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

How to Use the Online Help

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

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

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

Related Documentation

The BuyerXpert documentation set includes:

- *Cohabitation and Interoperability Guide*—Describes cohabitation and interoperability features and configuration of iPlanet BuyerXpert and iPlanet Market Maker.
- *Concepts*—Describes the over-all functionality of BuyerXpert. Read this document if you are unfamiliar with BuyerXpert.
- *Release Notes*—Contains important information on the current release of iPlanet BuyerXpert. Read this document before working with the new iPlanet BuyerXpert release.
- *Upgrade Guide*—Provides guidelines and instructions for upgrading an existing iPlanet BuyerXpert system, including migrating existing data and configurations.
- *Administrator's Guide*—Provides reference information and instructions on administering a fully-installed iPlanet BuyerXpert system.
- Admin interface Help—Provides guidelines and instructions for using the graphical administrative interface to administer iPlanet BuyerXpert.
- User interface Help—Provides guidelines and instructions for performing the procurement tasks of iPlanet BuyerXpert.
- Catalog interface Help—Provides guidelines and instructions for managing catalogs.

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

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

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

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

Product Support

How to Report Problems

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

- iPlanet online support web site at:

http://www.iplanet.com/support/support_services_10_0.html

From this location, the Online Support Center is available for logging problems.

The telephone dispatch number associated with your maintenance contract.

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

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

Any error logs or core dumps

Planning to Install BuyerXpert

This chapter describes planning and tasks you must perform before you can install BuyerXpert Version 4.5.

The following sections are contained in this chapter:

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

Assumptions About the Site Installer

This guide is written with the following assumptions:

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

Installation Checklist

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

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

Table 1-1 Installation Checklist

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

Requirements

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

- Hardware Requirements
- System Requirements
- Software Requirements

Hardware Requirements

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

- Two SunSPARC E450 / U80 (or better) workstations with:
 - 4 CPU (minimum)
 - 4 GB RAM (minimum)
 - 9 GB hard disk
 - CDROM drive

System Requirements

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

Table 1-2 System Requirements

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

Software Requirements

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

Table 1-3 Software Requirements

Software	Included (Embedded or Bundled) with the BuyerXpert CD
Actuate e.Report Server, Version 5.0	Yes (bundled)
iPlanet Web Server (iWS) Version 4.1 SP9 or higher	Yes (bundled)
iPlanet Application Server (iAS), Version 6.5	Yes (bundled)
iPlanet Directory Server (LDAP) Version 4.13 or higher	Yes (bundled with iAS 6.0 SP2)
ECXpert 3.5	No
Netscape Communicator Version 4.7 or higher (or Microsoft Internet Explorer Version 5.0 or higher)	No
Oracle Server Database Standard or Enterprise Edition with InterMedia text 8.1.7 or 9i	No
Oracle Client 8.1.7 or 9i (if BuyerXpert is not installed on the same machine). Oracle Client must be the same version as Oracle Server.	No

Completing the Installation Worksheet

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

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

After you complete the BuyerXpert installation, keep this worksheet in a safe place. It is useful in the future when you administer the system.

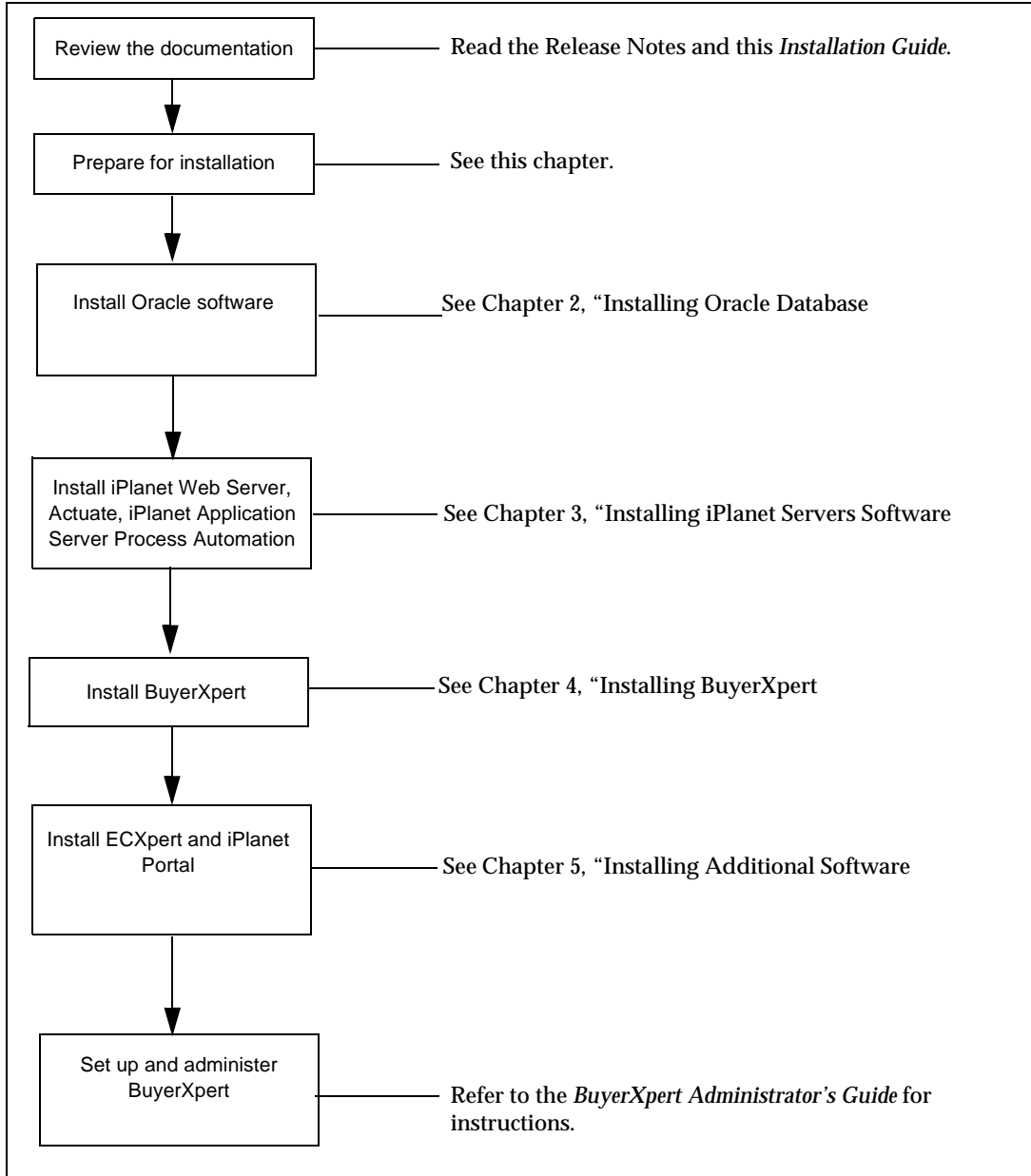
NOTE Make sure that you install the BuyerXpert and iAS as the same user. Do not install BuyerXpert and iAS as `root`.

Table 1-4 Installation Worksheet

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

Installation Roadmap

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



Installing Oracle Database

This chapter provides information about installing the Oracle 8.1.7 / 9i Database Server Standard or Enterprise Edition for Solaris 8 operating systems. You must install this software before installing BuyerXpert.

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

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

Hardware Requirements

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

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

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

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

Table 2-1 Assumptions for 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 8.1.7 / 9i Database Server Enterprise Edition only.

1. Start the installation process as root:

```
%su -
```

2. Create a directory for Oracle installation:

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

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

```
%groupadd dba
```

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

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

5. Change the ownership of the Oracle directory:

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

6. Create a password for oracle user:

```
%passwd oracle
```

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

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

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

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

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

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



```

set semsys:seminfo_semmns=4096
set semsys:seminfo_semmnu=4096
set semsys:seminfo_semume=100
set semsys:seminfo_semmsl=100
set semsys:seminfo_semopm=100
set semsys:seminfo_semvmx=32767
* -----
* Message Queue
* -----
set msgsys:msginfo_msgmap=1024
set msgsys:msginfo_msgmax=8192
set msgsys:msginfo_msgmnb=65535
set msgsys:msginfo_msgmni=1024
set msgsys:msginfo_msgssz=2048
set msgsys:msginfo_msgtql=1024
set msgsys:msginfo_msgseg=4096

```

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

```

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

```

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

```
NLS_LANG to AMERICAN_AMERICA.UTF8
```

9. Enter the following commands to boot the system:

```

%sync
%sync

```

```
%sync
```

```
%reboot
```

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

```
%su oracle
```

```
%password: oracle
```

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

12. Set the `DISPLAY` variable:

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

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

```
%xhost +
```

This allows the database installation to display on your screen.

14. From the Oracle CD, type:

```
./runInstaller
```

15. When the welcome screen displays, click Next.

The File Locations screen displays.



16. Leave the Source field unchanged.

The Destination field shows the `ORACLE_HOME` value that you have set in your environment.

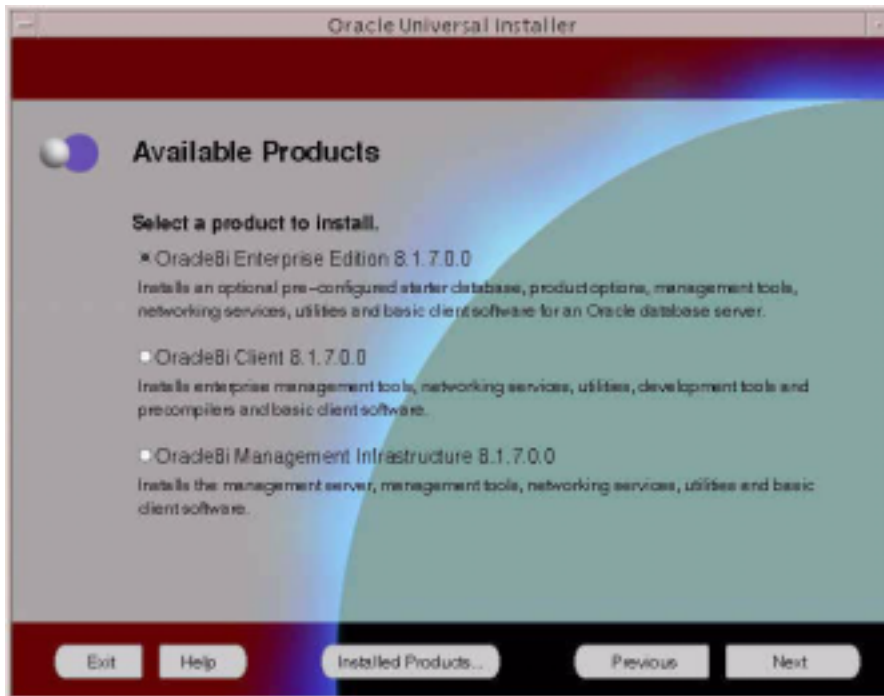
17. Click Next.

The UNIX Group Name screen displays.

18. Enter the name of the UNIX group you created earlier for Oracle (dba).

19. Click Next.

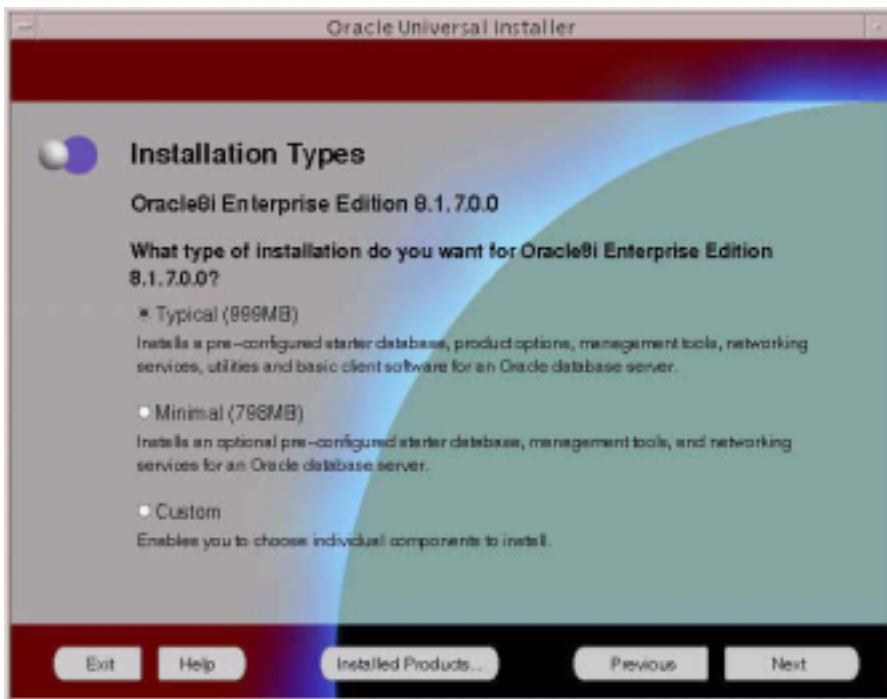
The Available Products screen displays.



20. Choose Oracle8i Enterprise Edition 8.1.7.0.0.

21. Click Next.

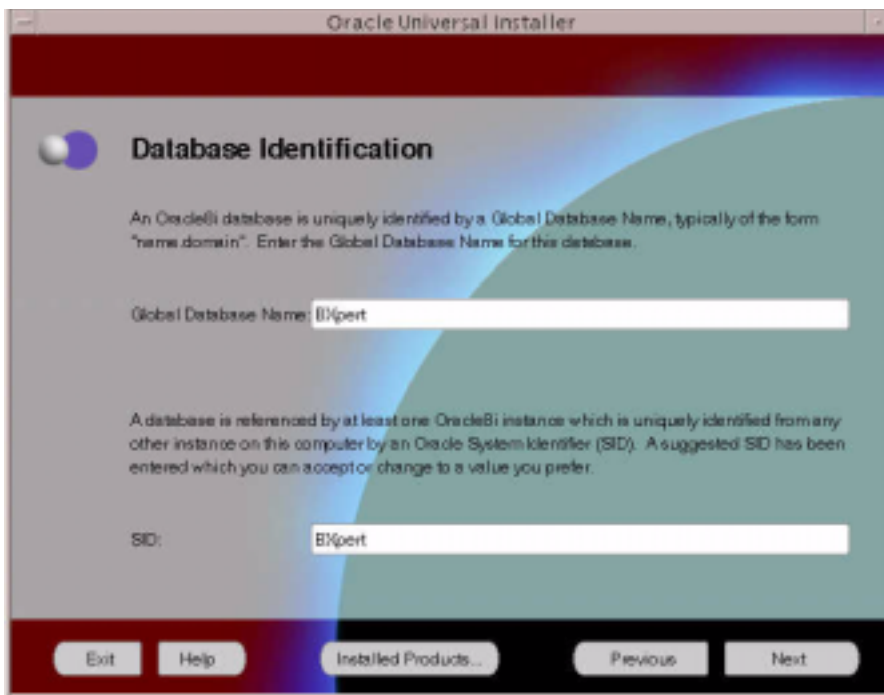
The Installation Types screen displays.



22. Select the Typical install to get a basic set of Oracle software installed.

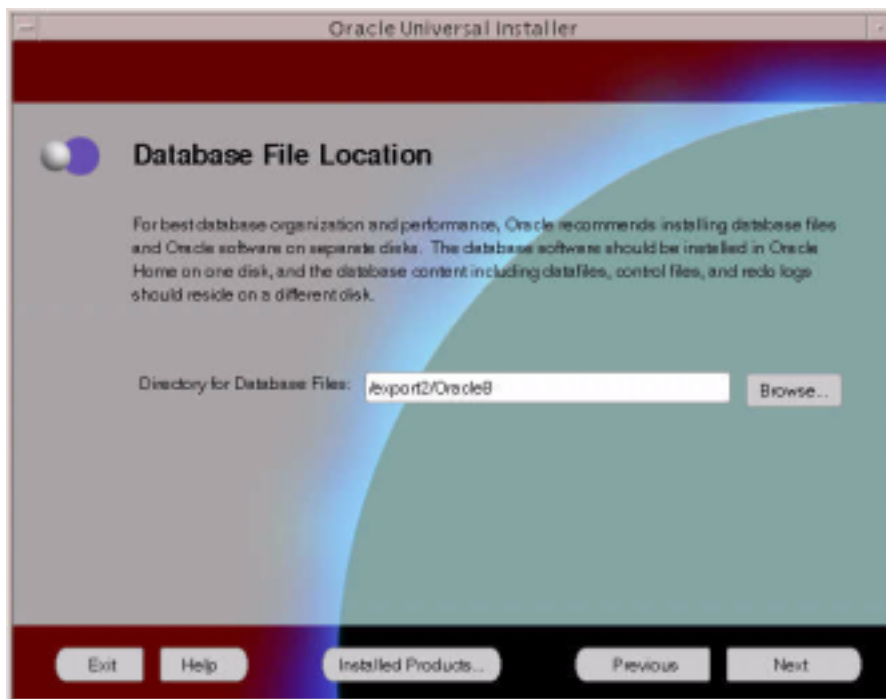
23. Click Next.

The Database Identification screen displays.



24. Enter the ORACLE_SID you are creating for both the Global Database Name and SID.
25. Click Next.

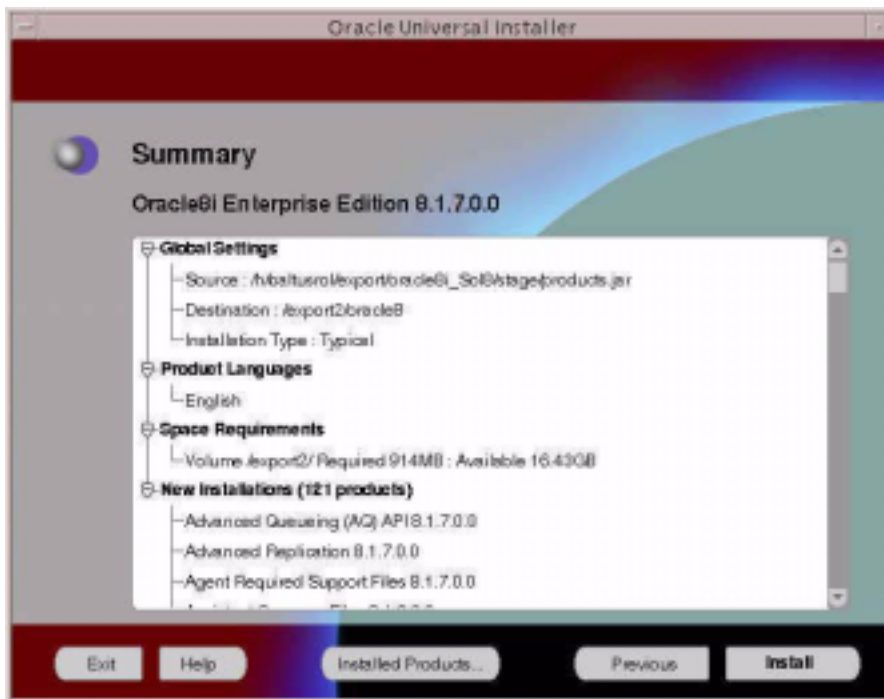
The Database File Location screen displays.



26. Enter the directory you have created earlier to install Oracle.

27. Click Next.

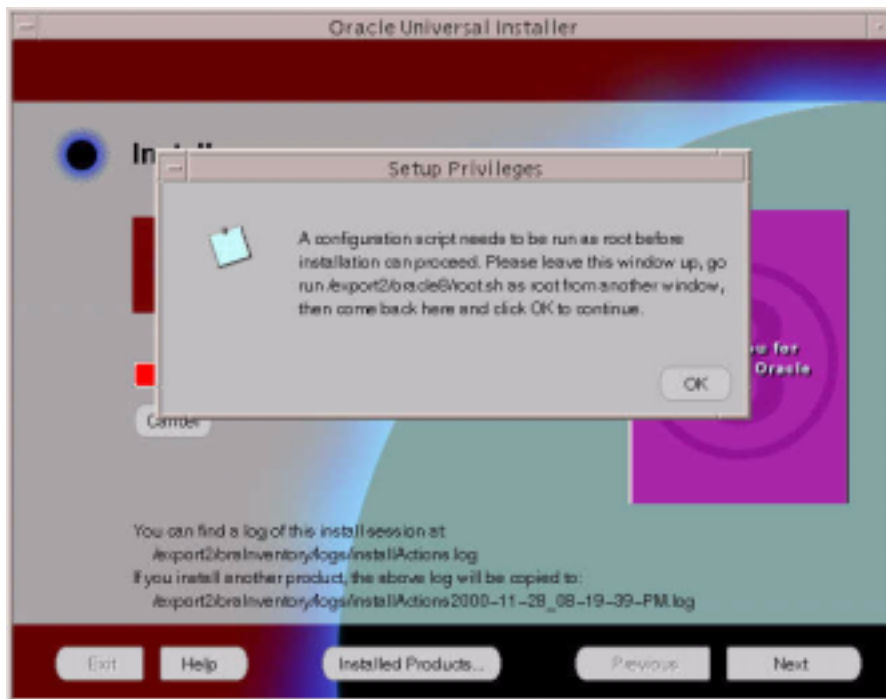
The Summary screen displays.



28. Review all the selections you have made to confirm that they are correct.

29. Click Install.

During installation, a Setup Privileges window displays.



The installation pauses at this point, waiting for you to run a script as `root`.

30. Follow the instructions and run the `root.sh` script as a root user.

31. After executing the script, click OK.

32. Click Next.

When Oracle installation has completed, a screen displays the database information.

33. Verify that information.

34. Click OK.

This is the end of Oracle Installation.

35. Click Exit.

During the installation, a default database instance is created. The instance is created in the name that you have provided in the Database Identification screen. You do not want to use this instance since it is not configured to BuyerXpert's specification.

36. You need to remove this instance by executing `dbassist` from `<ORACLE_HOME>/bin` directory and select delete a database.

37. Click Next.

38. Select the database instance (there should only be one instance since you just created the database server).

39. Click Finish.

The database instance should now be deleted.

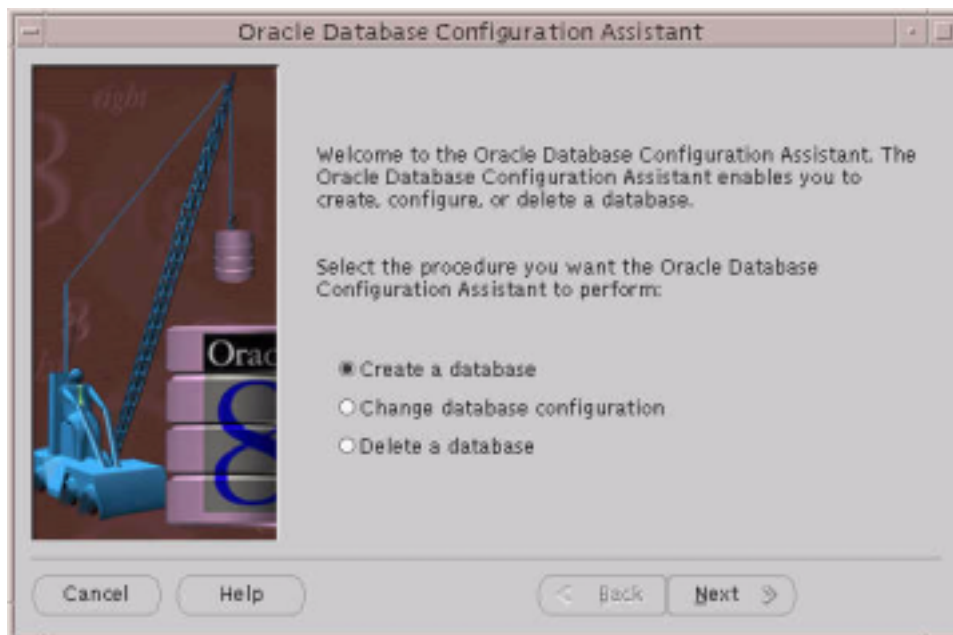
Create an Oracle Instance

The following procedures are to create an Oracle instance that is configured to BuyerXpert 4.5.

You now need to create an Oracle instance that is configured to the specification of BuyerXpert.

1. Execute `dbassist` from `<ORACLE_HOME>/bin` directory.

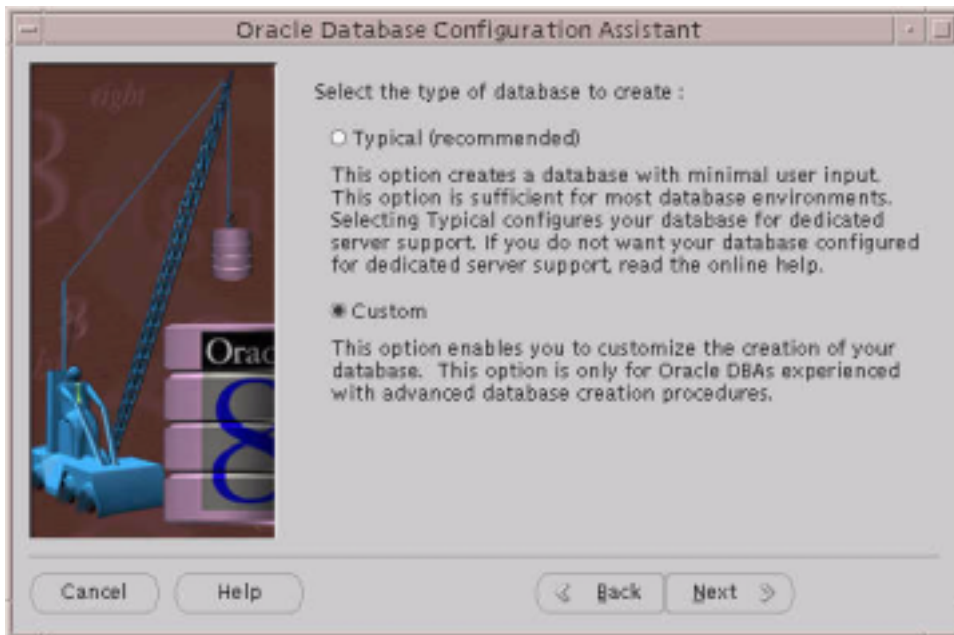
The Welcome screen displays.



2. Select create a database.
3. Click Next.

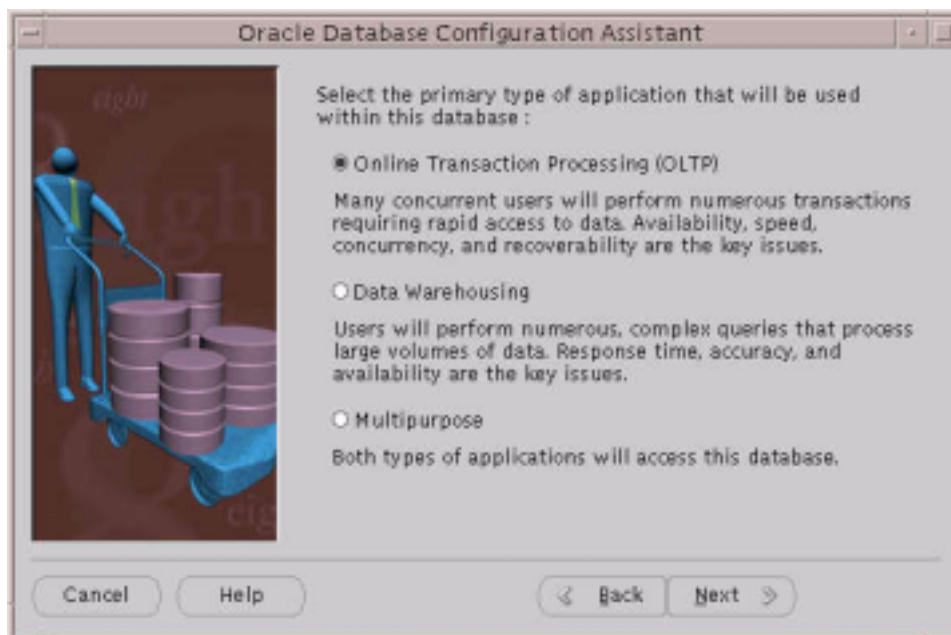
The Select the type of database to create screen displays.

To configure to BuyerXpert's specification, you need to customize the creation of the database instance.



4. Select the custom option.
5. Click Next.

The Select the primary type of application that will be used within this database screen displays.



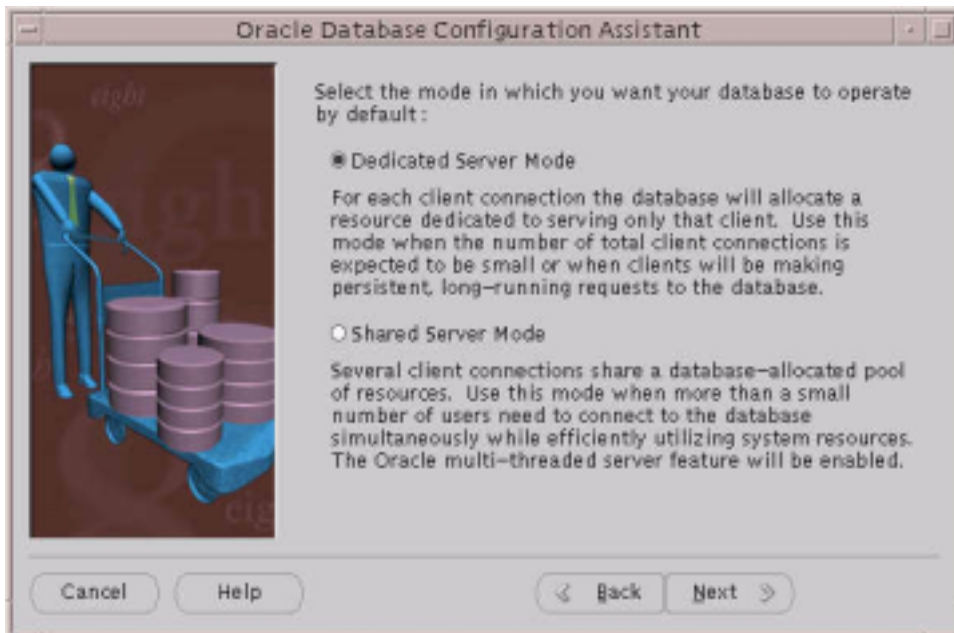
6. Select Online Transaction Processing (OLTP).
7. Click Next.
8. When the next screen displays, enter the approximate number of users to be concurrently (simultaneously) connected to the database at any given time.

Oracle Database Configuration Assistant uses this value and the information you provided about your database environment on the previous screen to set rollback information and various initialization file parameters.

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

For BuyerXpert, you need at least 20 users.

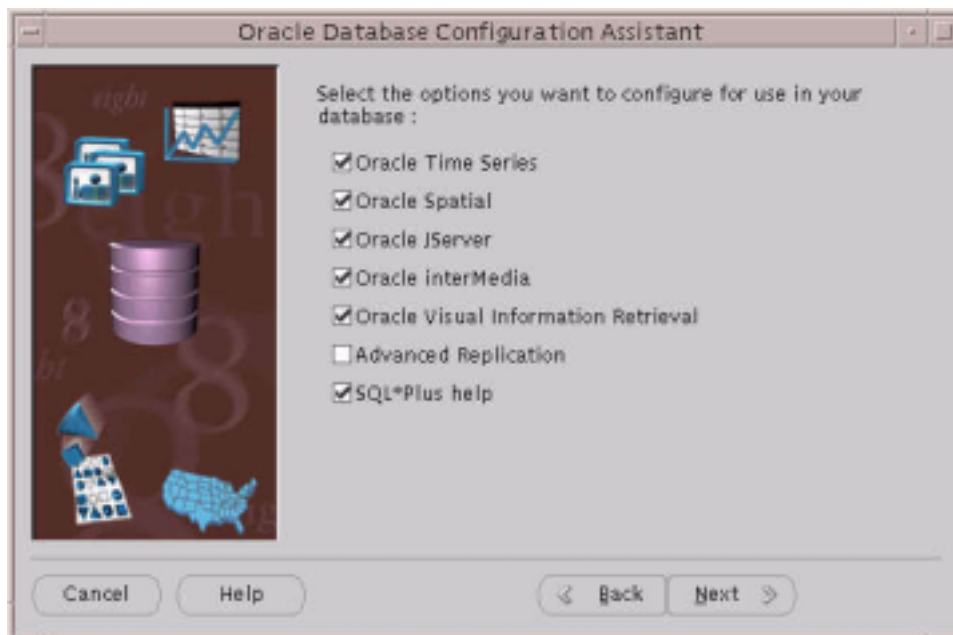
9. Click Next.
- The Select the mode in which you want your database to operate by default screen displays.



10. Since only a small amount of BuyerXpert uses this instance, select Dedicated Server Mode.

11. Click Next.

The Select the options you want to configure for use in your database screen displays.

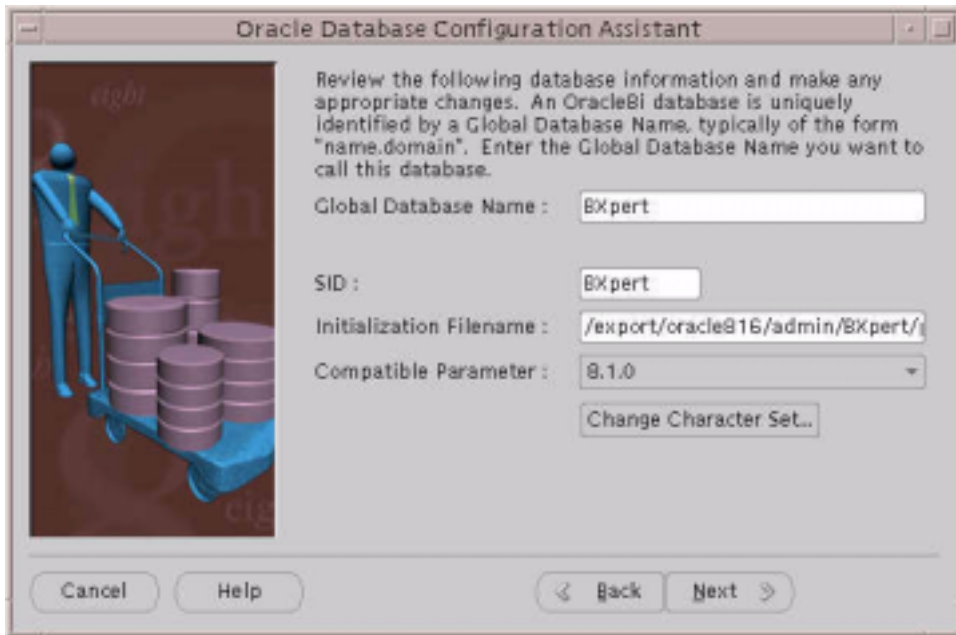


12. Click the following checkboxes:

- o Oracle Time Series
- o Oracle Spatial
- o Oracle JServer
- o Oracle InterMedia
- o Oracle Visual Information Retrieval
- o SQL*Plus help

13. Click Next.

The Review the following database information screen displays.



14. Enter the database name.

15. Enter the SID.

If your `NLS_LANG` is set to UTF-8, then the character set is UTF-8.

16. If you want to change it, click Change Character Set...

Make sure that the environment `NLS_LANG` is set to the character set that you selected.

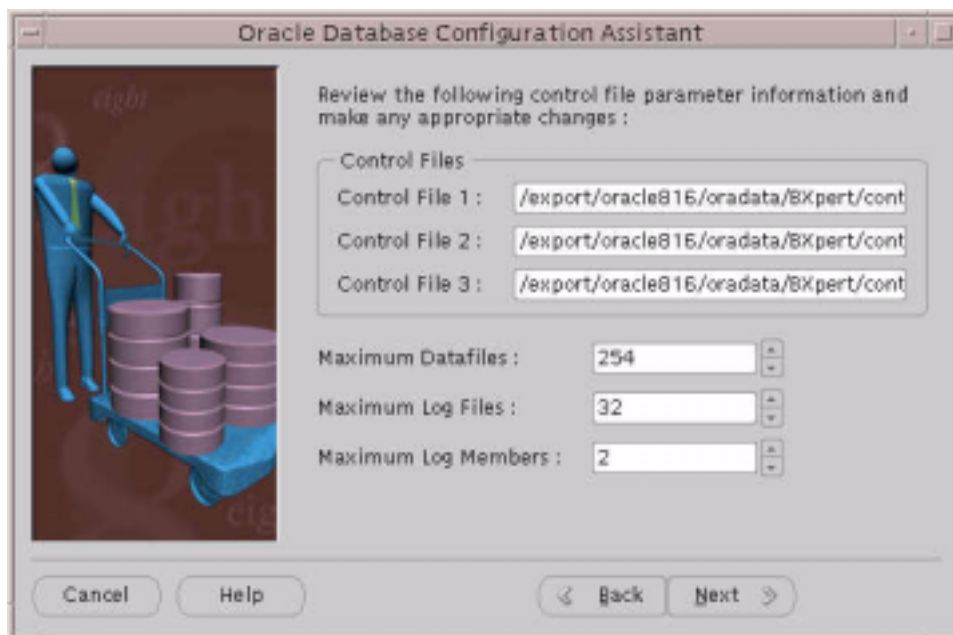
17. Click Next.

The Review the following control file parameter information screen displays.

NOTE The following steps 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, consider creating an `oradata/ORACLE_SID` directory on a different disk and save the control, dbf, and log files there.



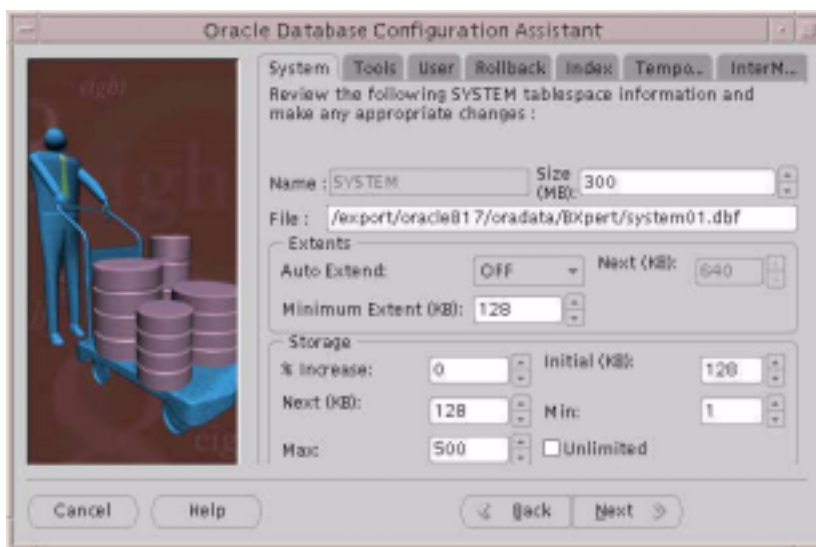
18. Enter the location of the control files.

The recommended parameters are:

- Maximum Datafiles: 254
- Maximum Log Files: 32
- Maximum Log Members: 2

19. Click Next.

The System tablespace information screen displays.



20. Enter the system tablespace information.

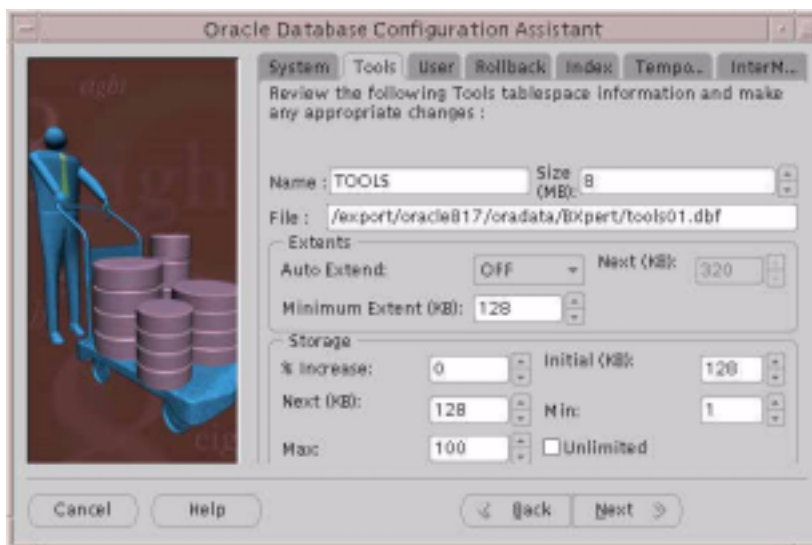
The recommended parameters are:

- 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.

21. Click Next (or click the Tools tab).

The Tools tablespace information screen displays.



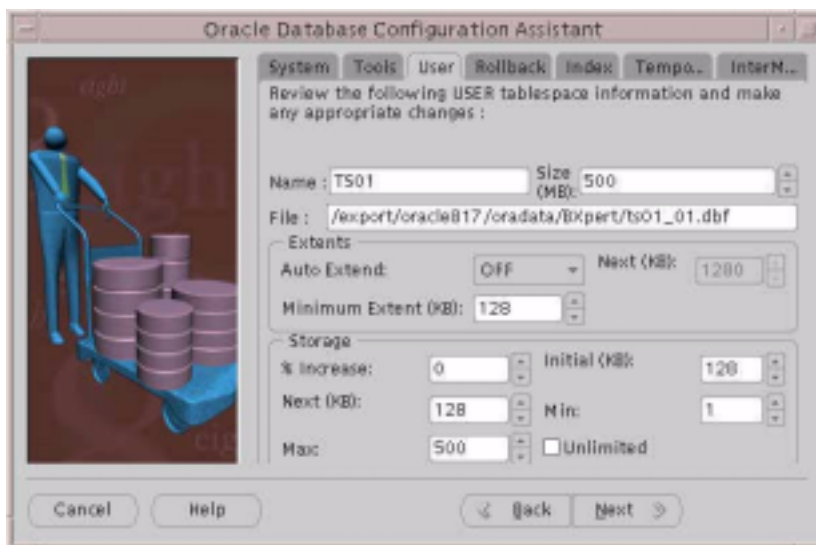
22. Enter the tools tablespace information.

- 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

23. Enter the location where you want to save the `tools01.dbf` file.

24. Click Next (or click the User tab).

The User tablespace information screen displays.



25. Enter the user tablespace information.

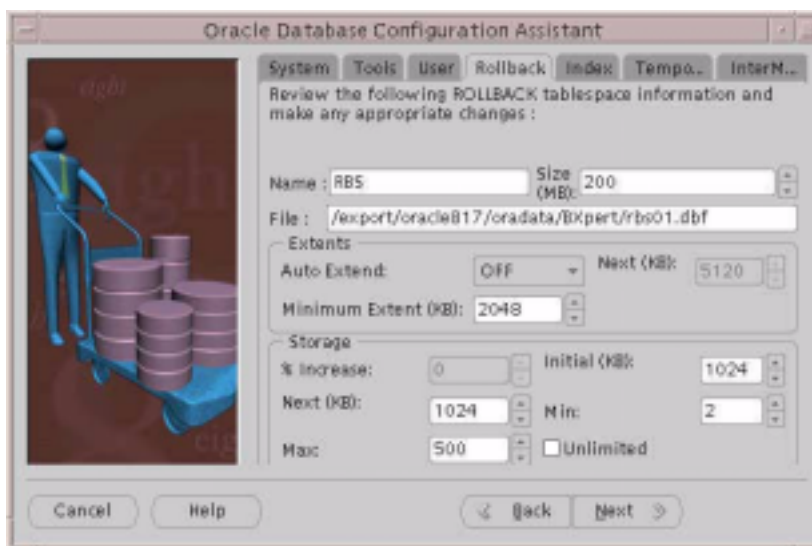
The recommended parameters are:

- Name: TS01
- Size (MB): 500
- Auto Extend: OFF
- Minimum Extent (KB): 128
- %Increase: 0
- Initial (KB): 128
- Next (KB): 128
- Min: 1
- Max: 500

26. Enter the location where you want to save the `ts01.dbf` file.

27. Click Next (or click the Rollback tab).

The Rollback tablespace information screen displays



28. Enter the rollback tablespace information.

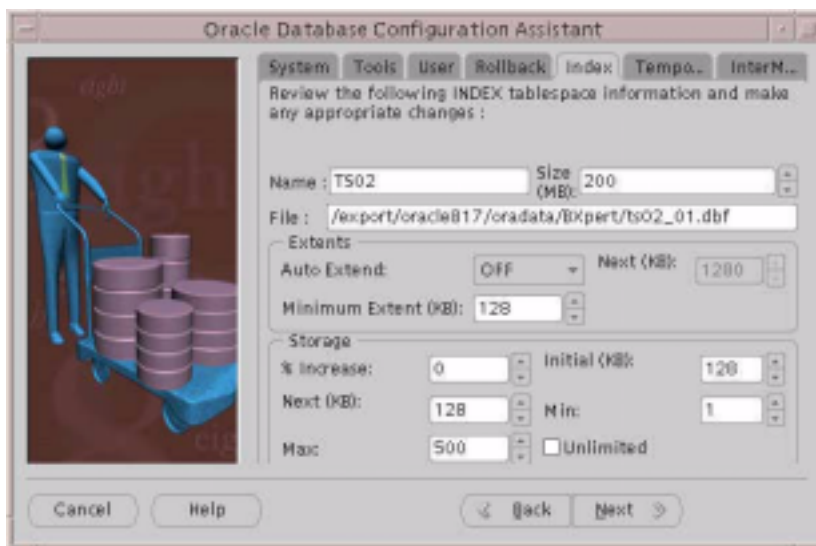
The recommended parameters are:

- NAME: RBS
- Size (MB): 200
- Auto Extend: OFF
- Minimum Extent (KB): 2048
- %Increase: 0
- Initial (KB): 1024
- Next (KB): 1024
- Min: 2
- Max: 500

29. Enter the location where you want to save rbs01.dbf file.

30. Click Next (or click the Index tab).

The Index tablespace information page displays.



31. Enter the index tablespace information.

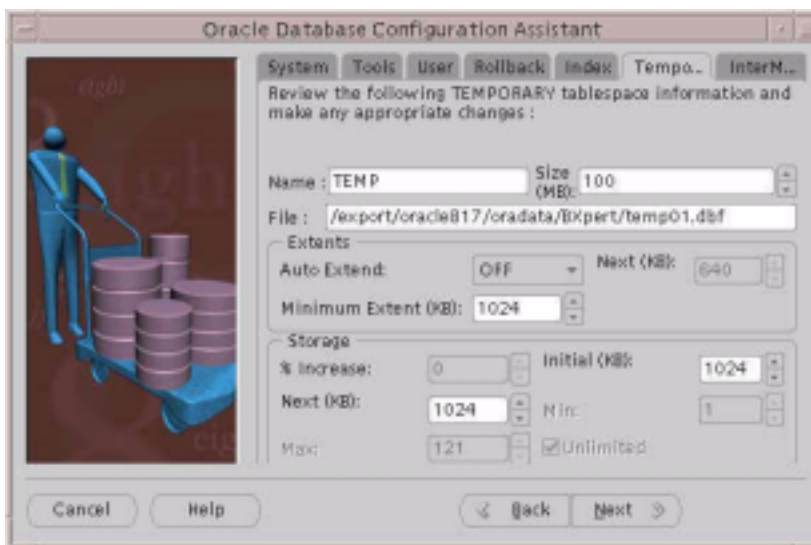
The recommended parameters are:

- Name: TS02
- Size (MB): 200
- Auto Extend: OFF
- Minimum Extent (KB): 128
- %Increase 0
- Initial (KB): 128
- Next (KB): 128
- Min: 1
- Max: 500

32. Enter the location where you want to save the `indx01.dbf` file.

33. Click Next (or click the Temporary tab).

The Temporary tablespace information screen displays.



34. Enter the temporary tablespace information.

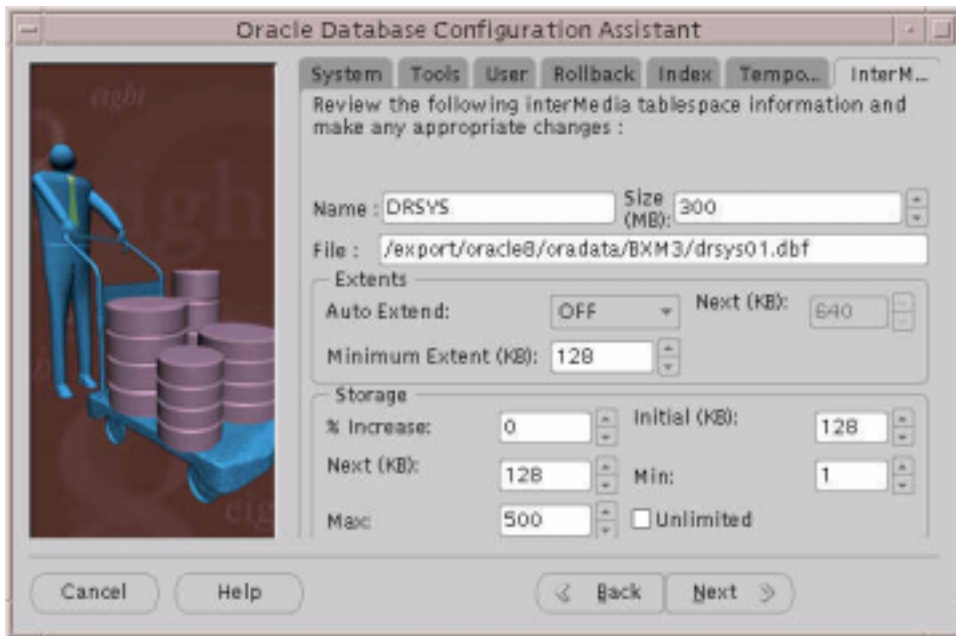
The recommended parameters are:

- Name: TEMP
- Size (MB): 100
- Auto Extend: OFF
- Minimum Extent (KB): 2048
- Initial (KB): 1024
- Next (KB): 1024

35. Enter the location where you want to save the temp01.dbf file.

36. Click Next (or click the interMedia tab).

The interMedia tablespace information screen displays.



37. 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

38. Enter the location where you want to save the drsys01.dbf file.

39. Click Next.

The redo log file screen displays.

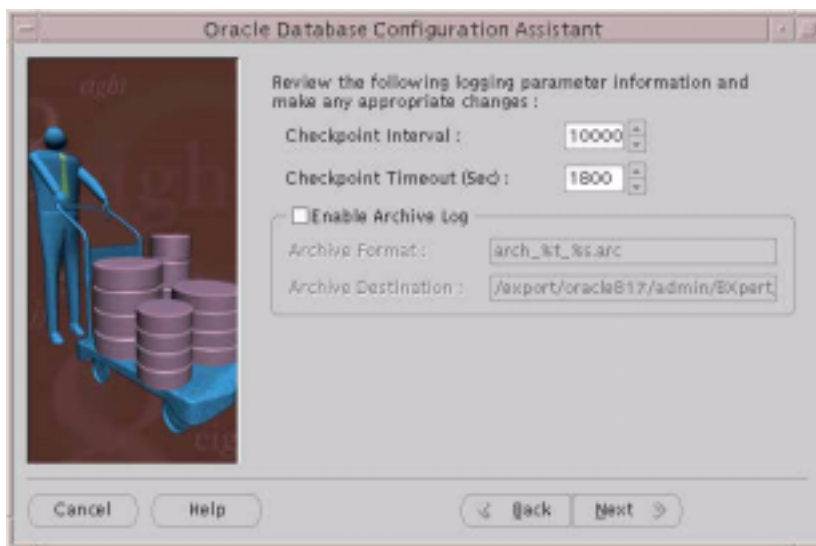
**40. Enter the redo log file location.****41. Enter the redo file size.**

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

42. Click Next.

The logging parameter information screen displays.



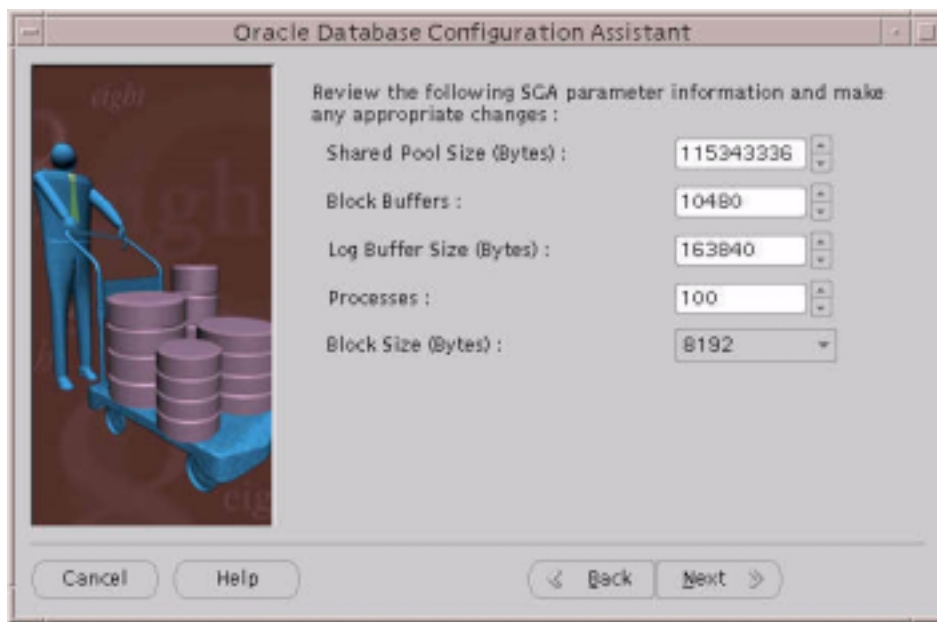
43. Enter the login parameter information.

The recommend parameters are:

- Checkpoint Interval: 10000
- Checkpoint Timeout (Sec): 1800

44. Click Next.

The SGA parameter information screen displays



45. 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

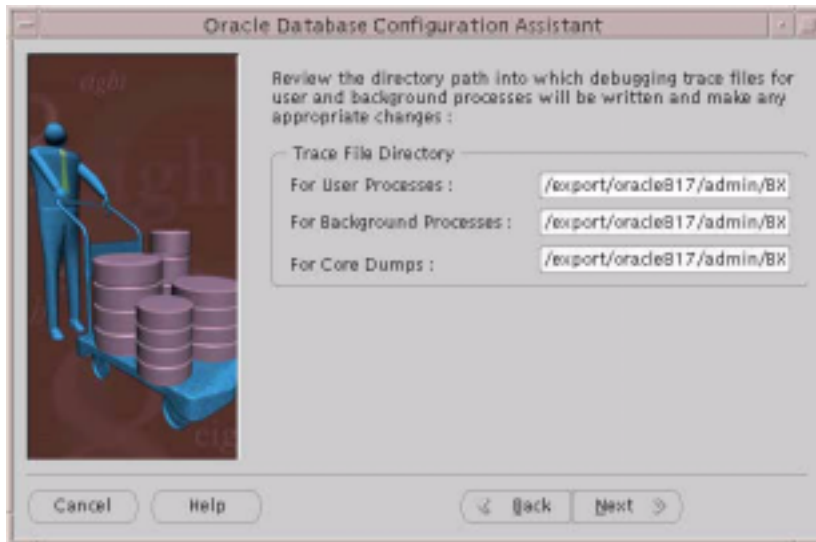
NOTE

NOTE

- Block size is very important - make sure you have at least 8192 bytes.
- 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.

46. Click Next.

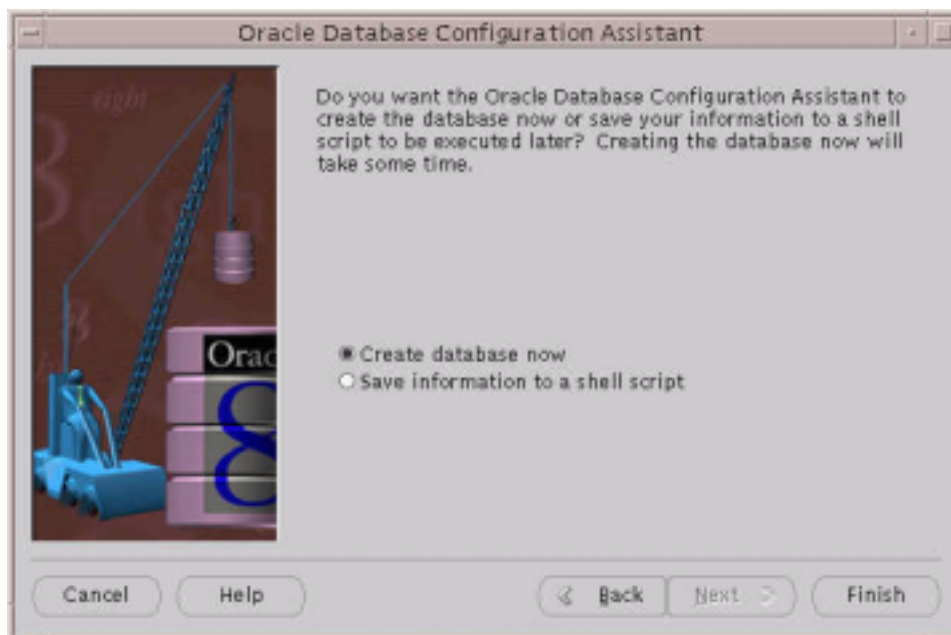
The Trace File Directory screen displays.



47. Review the directory paths and make any appropriate changes.

48. Click Next.

The final create a database screen displays.



49. Select Create Database Now.

50. Click Finish.

This process can take approximately 2-3 hours.

51. After completion of creating the database instance, stop the Oracle instance by entering the following (if using Oracle 8.1.7):

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

Or, if using Oracle 9i, enter the following:

```
%sqlplus /nolog
%sqlplus> connect / as sysdba;
```

```
%sqlplus> shutdown immediate;  
%sqlplus> quit
```

52. To make sure listener is running, enter the following:

```
%lsnrctl status
```

53. If listener is not running, start the listener by entering:

```
%lsnrctl start
```

54. 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 = ",."
```

55. Restart the database instance by entering the following (if using Oracle 8.1.7):

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

Or, if using Oracle 9i, enter the following:

```
%sqlplus /nolog  
  
%sqlplus> connect / as sysdba;  
  
%sqlplus> startup  
  
%sqlplus> quit
```

This concludes the Oracle installation.

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 follow before installing iPlanet BuyerXpert.

NOTE For detailed information on these software programs, see:

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

The following sections are contained in this chapter:

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

When you follow these procedures to install the servers software, you are able to install iPlanet BuyerXpert with sample data.

What You Should Know About the iPlanet Application Server

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

Application Server Components

The components that install with the iPlanet Application Server are described as follows:

- The Application Server includes the Administration Server, the Web Connector plug-in used to communicate between the iPlanet Application Server and the Web Server.
- 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 can be 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 has 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)

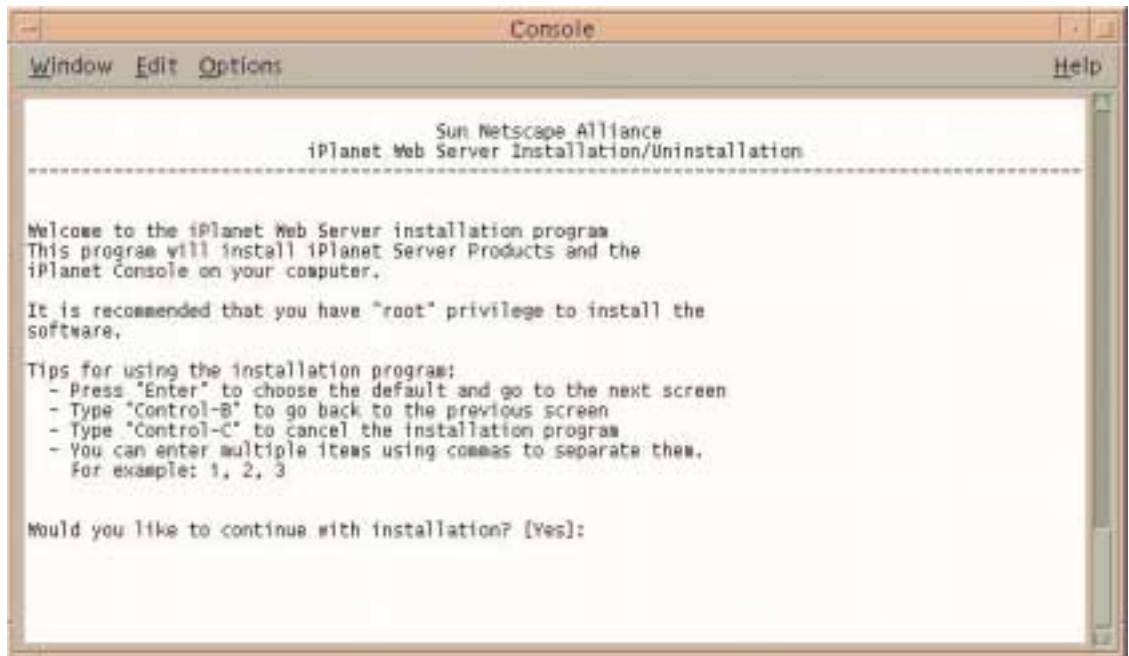
NOTE Before installing iWS, make sure you are in the right user and group. If not, create the user and group.

To install iWS:

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

```
#tar xvf iws60sp2-solaris.tar  
# ./setup
```


The Welcome screen displays.



```
-----
                          Sun Netscape Alliance
                          iPlanet Web Server Installation/Uninstallation
-----

Welcome to the iPlanet Web Server installation program.
This program will install iPlanet Server Products and the
iPlanet Console on your computer.

It is recommended that you have "root" privilege to install the
software.

Tips for using the installation program:
- Press "Enter" to choose the default and go to the next screen
- Type "Control-B" to go back to the previous screen
- Type "Control-C" to cancel the installation program
- You can enter multiple items using commas to separate them.
  For example: 1, 2, 3

Would you like to continue with installation? [Yes]:
```

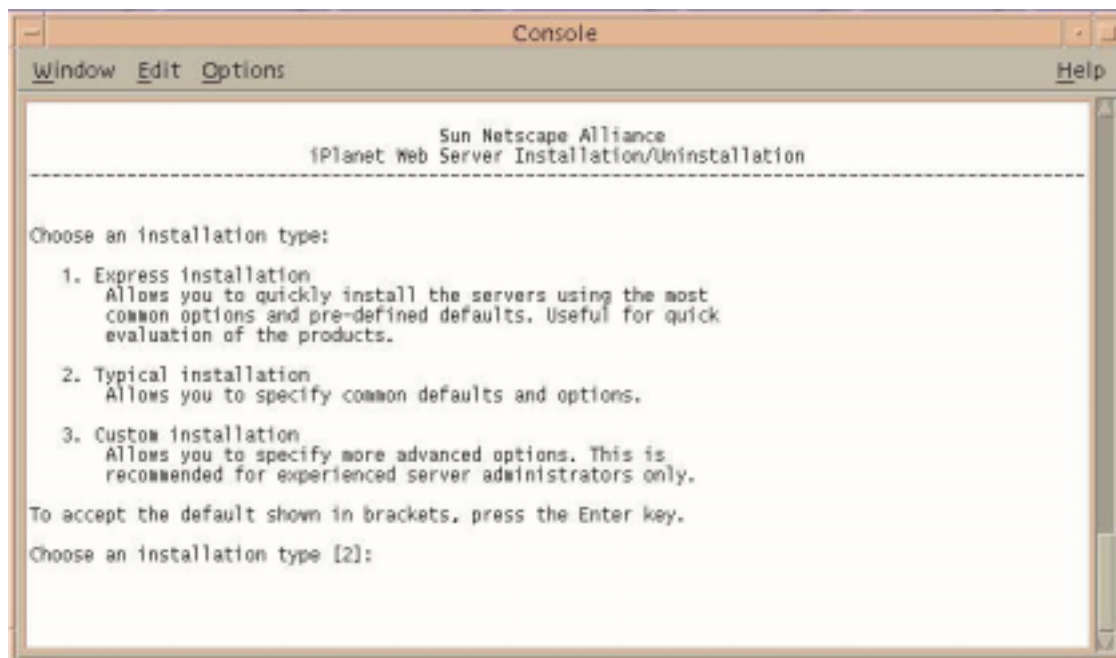
2. Press Enter to continue.

The Licensing Agreement screen displays.



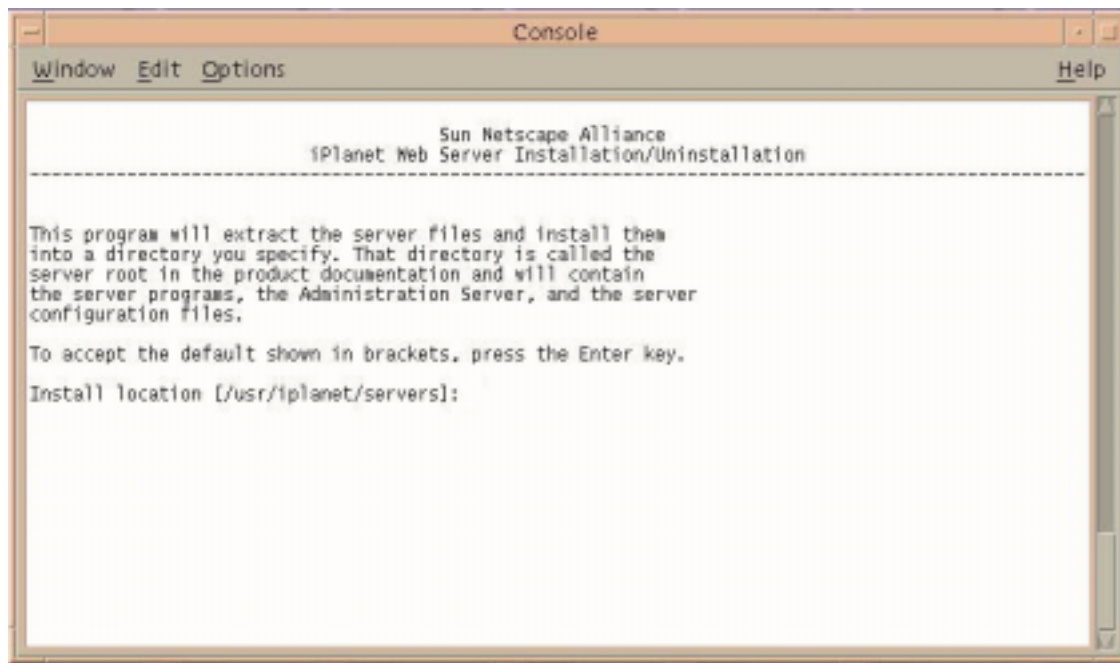
3. Enter **yes** to continue

The Installation Type screen displays.



4. Press Enter to accept a typical installation.

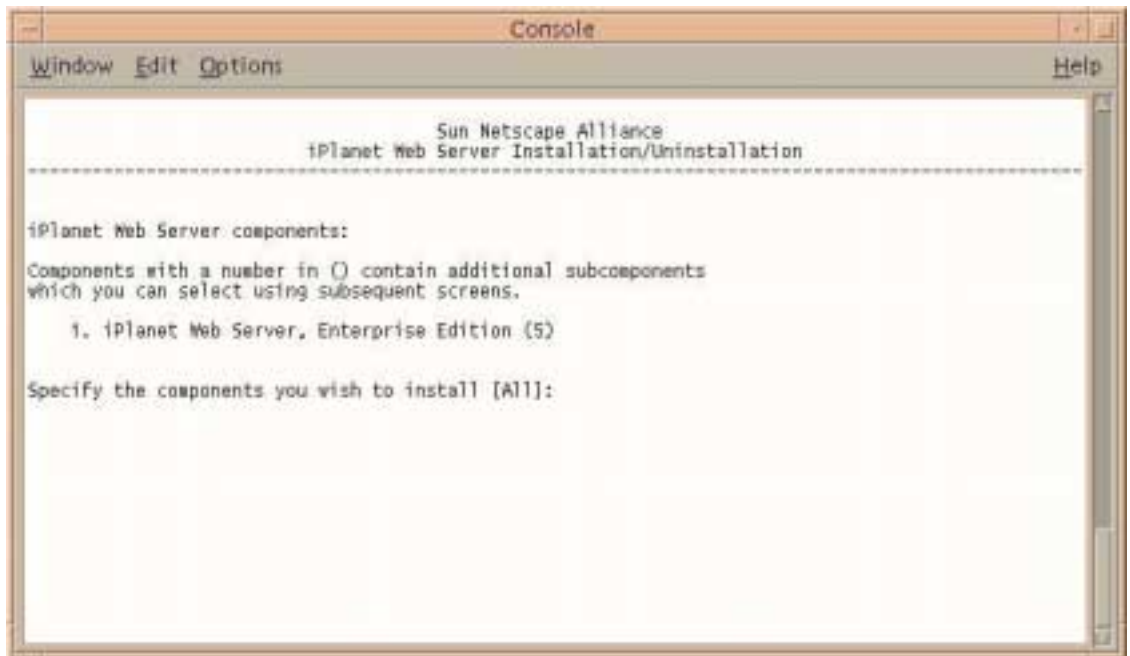
The Extracting Server Files screen displays.



5. Enter the location where you want to install iWS.

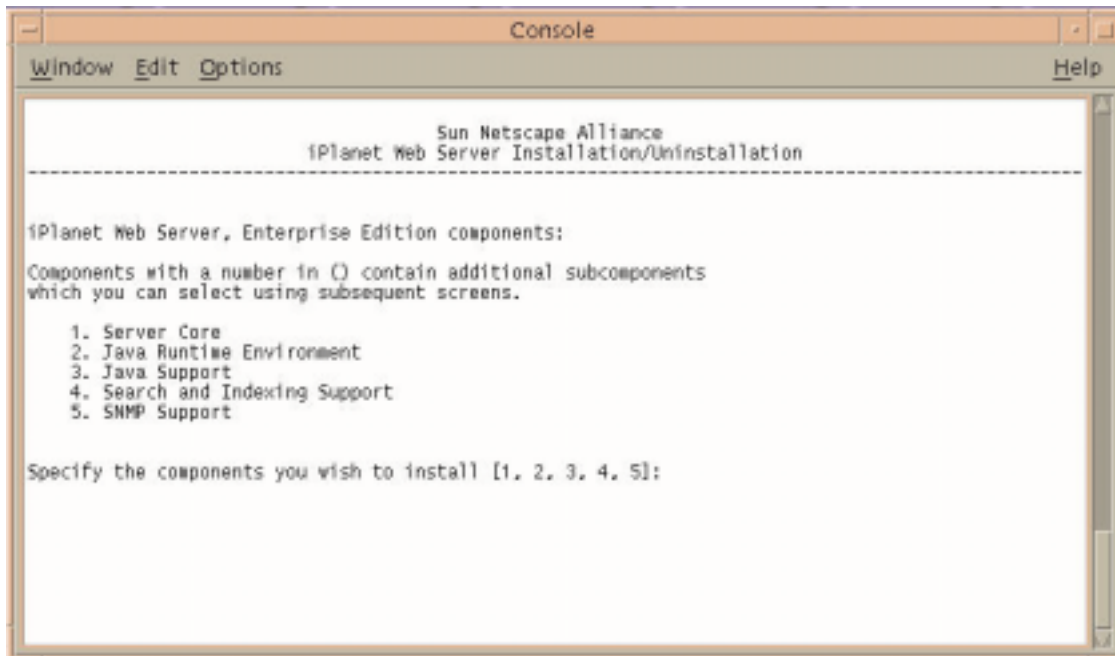
The installer creates this directory.

The Web Server Component screen displays.



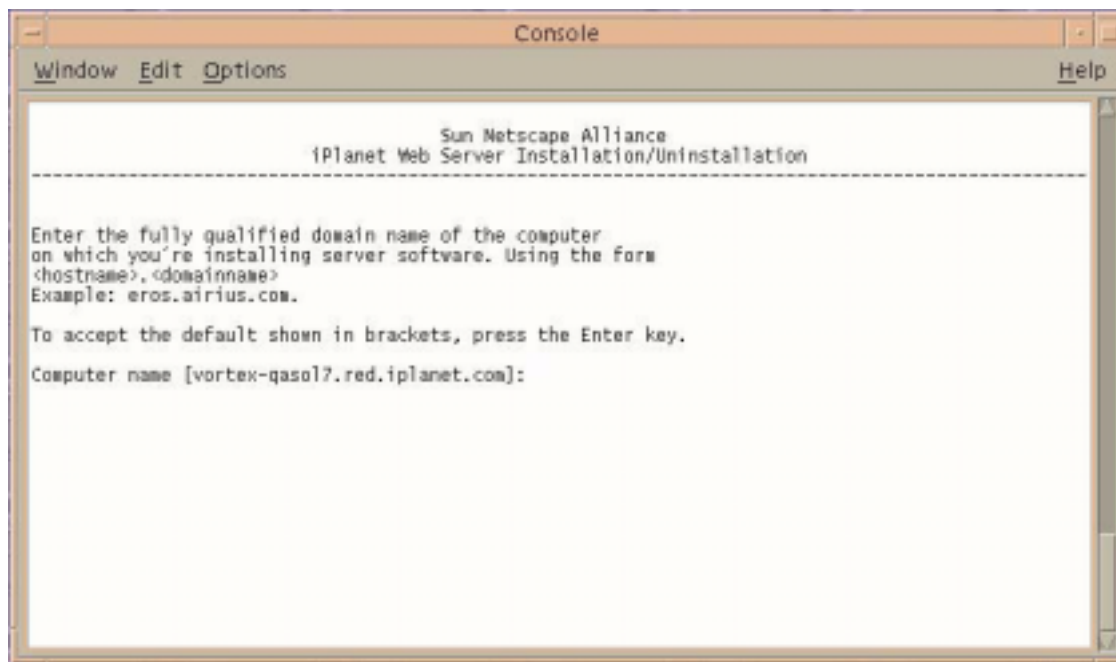
6. Press Enter to specify all the components.

The Additional Web Server Components screen displays.



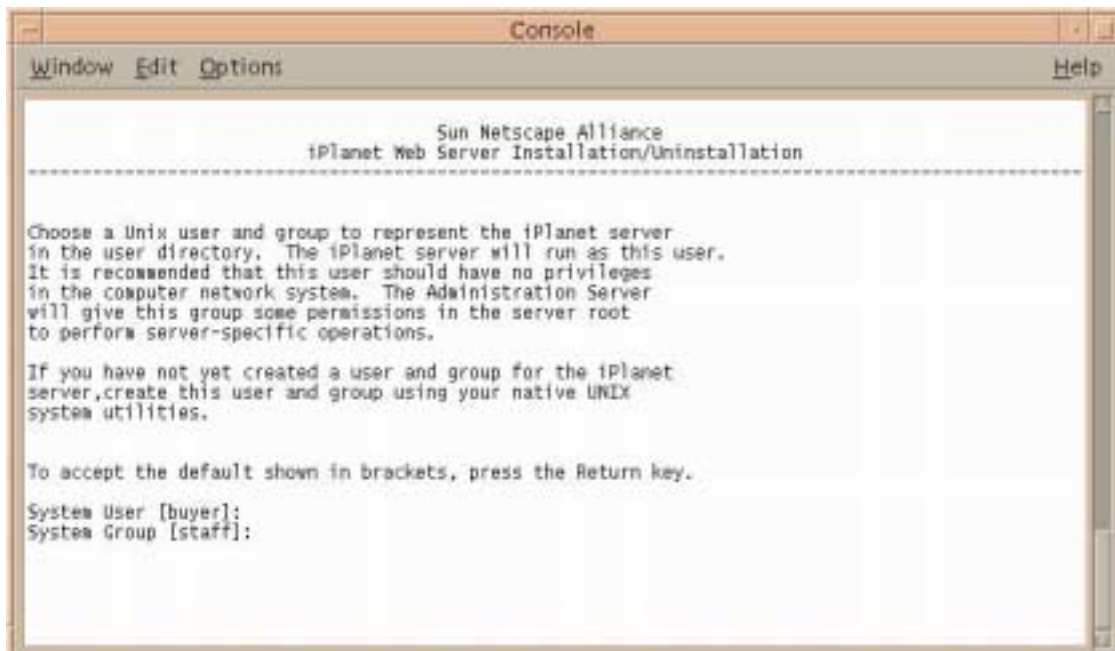
7. Press Enter to specify all the components listed.

The Domain Name screen displays:



8. Read the instructions
9. Verify that this is the correct computer name.
10. Press Enter.
11. If the computer name is not correct, enter the correct domain name.
12. Press Enter.

The Choosing a UNIX User and Group screen displays.



13. Choose the default only if you want iWS to use the displayed UNIX user and group to run iWS.
14. Press Enter to accept the default, or enter a UNIX user and group.

The iWS Administration Server User Name screen displays.



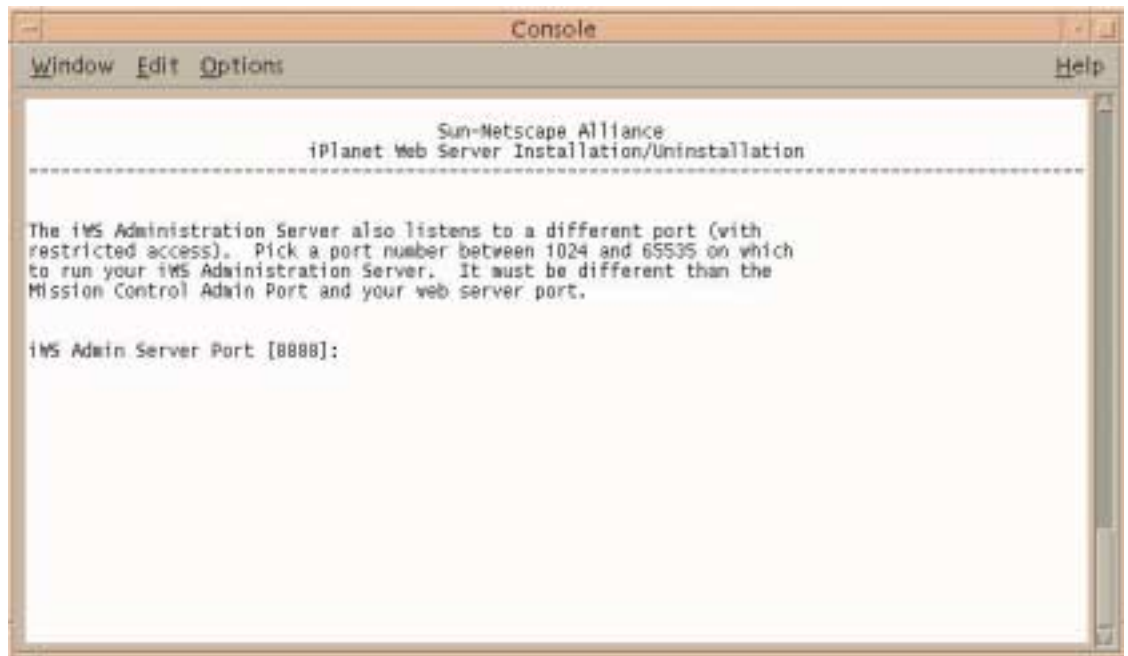
15. Press Enter to accept the default, or enter a new iWS username.

The Administrative User Name and Password screen displays.



16. Enter a password.
17. Enter the password again.
18. This password is used to access the administration of iWS.

The Administration Server Port Number screen displays.



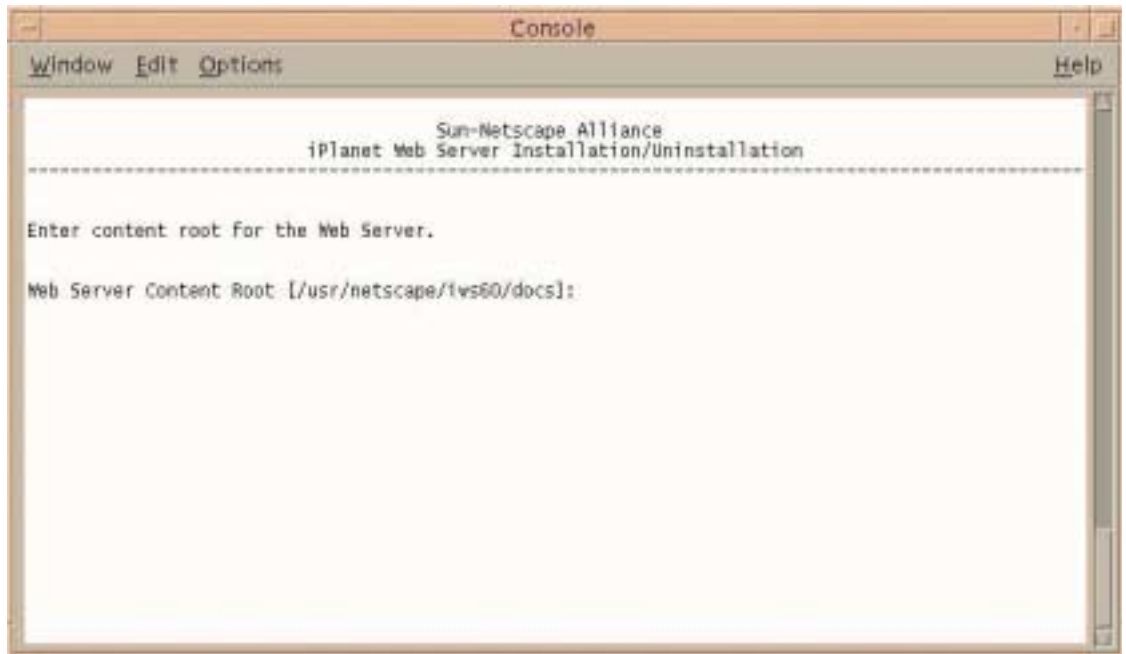
19. Enter your iWS administration server port number, or use the default port number 8888.

The Web Server Port Number screen displays.



20. Enter your iWS port number, or accept the default.

The Content Root for the Web Server screen displays.



21. Press Enter to accept the default, which is the location of the documents for iWS.

The Java Support screen displays.



22. If you want to use the JDK that is provided, press Enter.
23. Enter ν if you want to use your own JDK.

NOTE iPlanet BuyerXpert does not run from the Java Development Kit (JDK) that is installed with this step and is not affected by what you select from this screen.

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



```
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/IMS41 and type startconsole to begin
managing your servers.

buyer@colonial:/export/ivs_download> cd ../IMS41
buyer@colonial:/export/IMS41> ./startconsole &
```

24. Press Enter to continue.

The installation of iWS is complete.

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

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

To set this:

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

Installing Actuate

See the Actuate installation instructions that are 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 For the BuyerXpert installation script to configure the Actuate instance, it is recommended that you install Actuate on the same machine and with the same user as the BuyerXpert installation. Otherwise, you need to manually convert Actuate to run with BuyerXpert.

Installing iPlanet Application Server (iAS)

NOTE Make sure you are the right user and in the right group before installing iAS. You must install iAS as the same user that you use to install BuyerXpert.

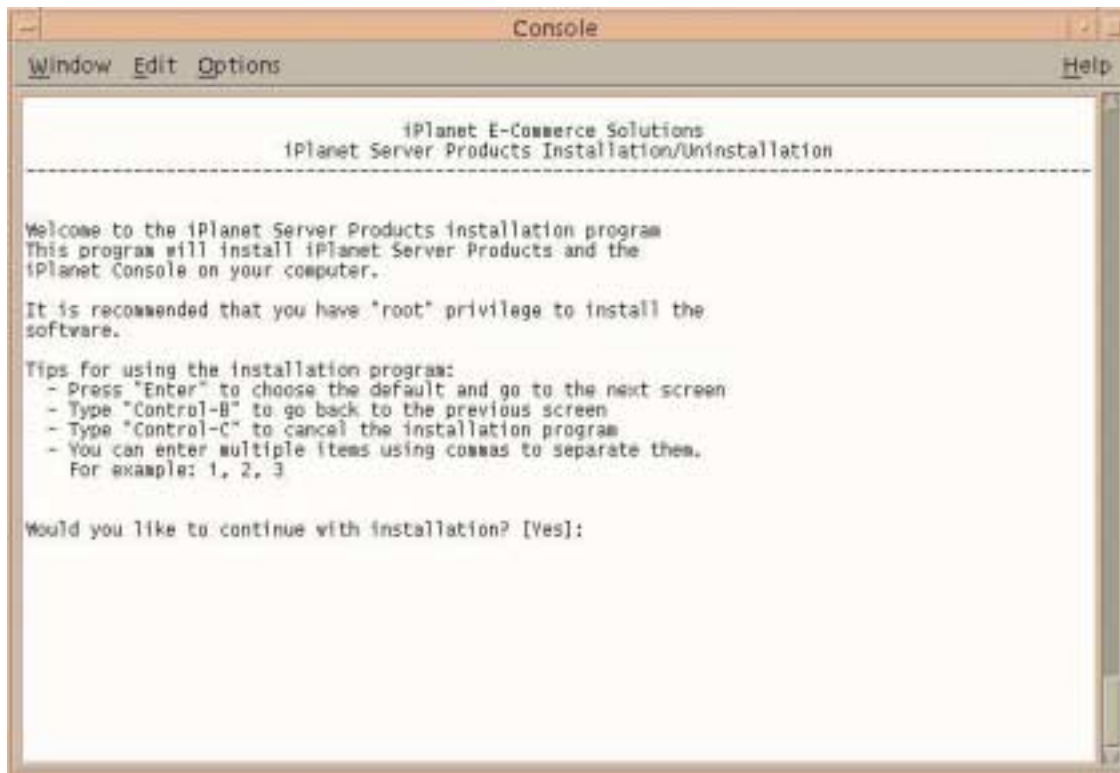
NOTE For detailed information on installing iAS, see:
<http://docs.iplanet.com/docs/manuals/index.html>

To install iAS:

1. Unzip and set up the iAS file:

```
# unzip pae65_complete_ux.zip
# cd installer
# ./setup
```

The Welcome screen displays.



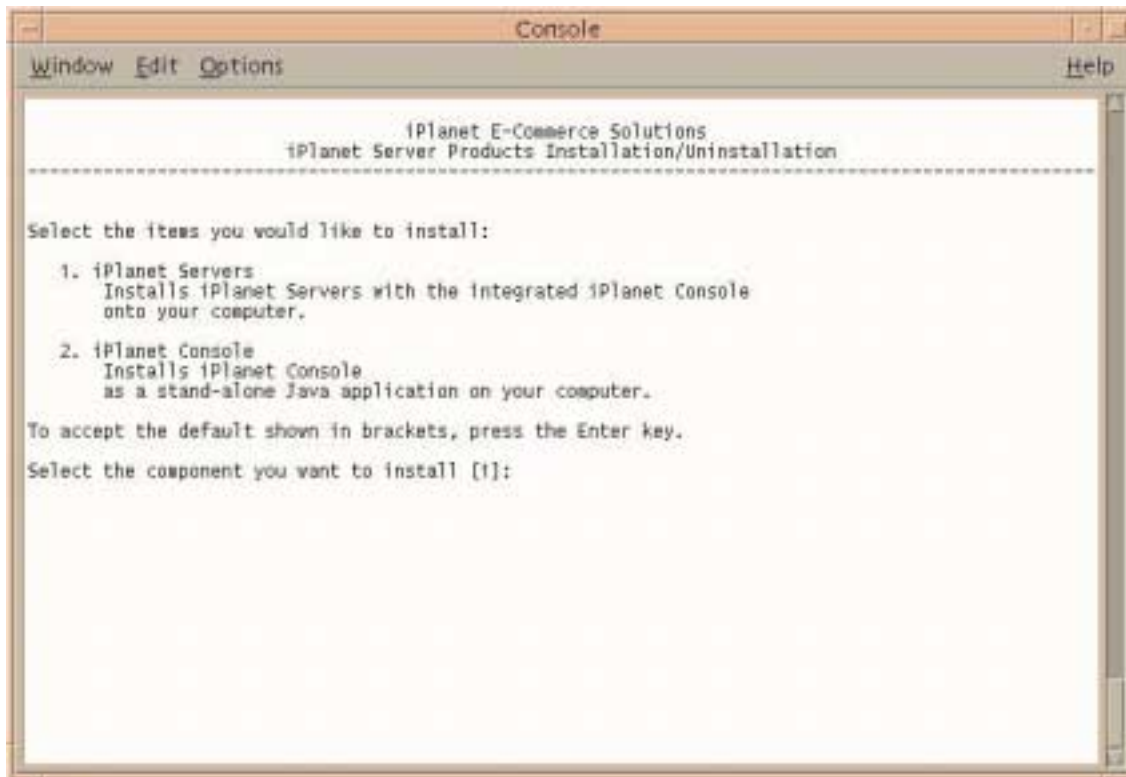
2. Press Enter to continue.

The Licensing Agreement screen displays.



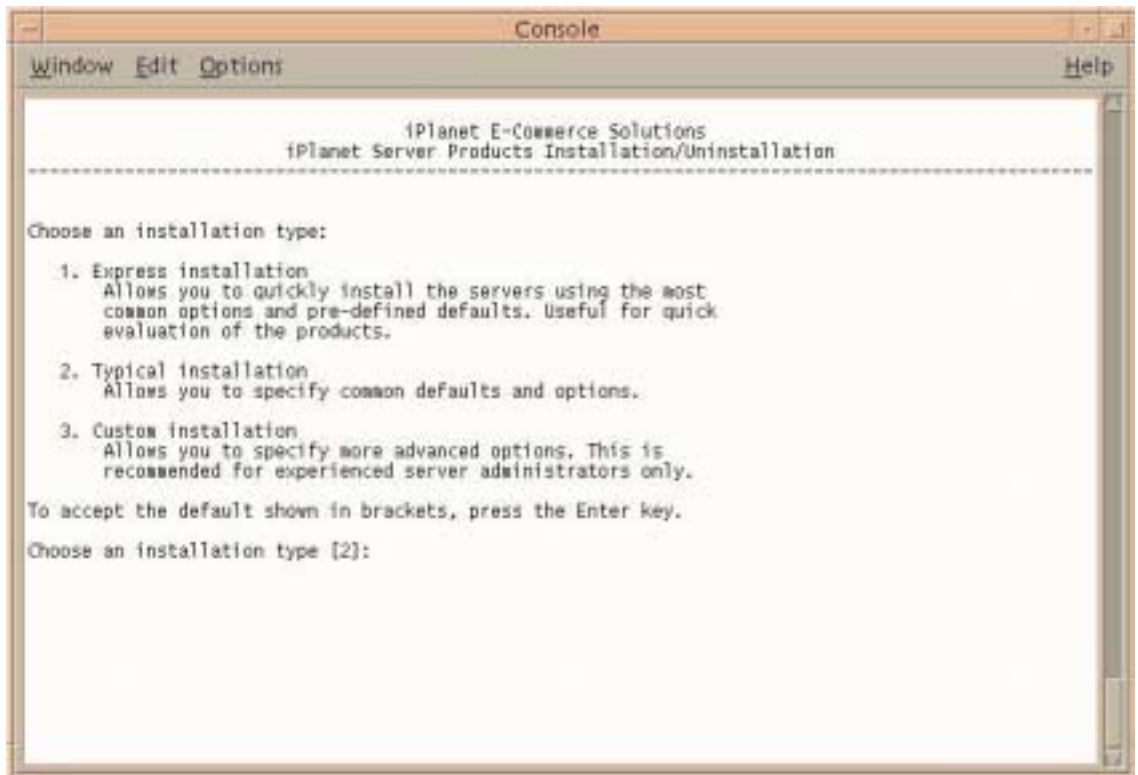
3. Enter **yes** to continue.

The Install Items screen displays.



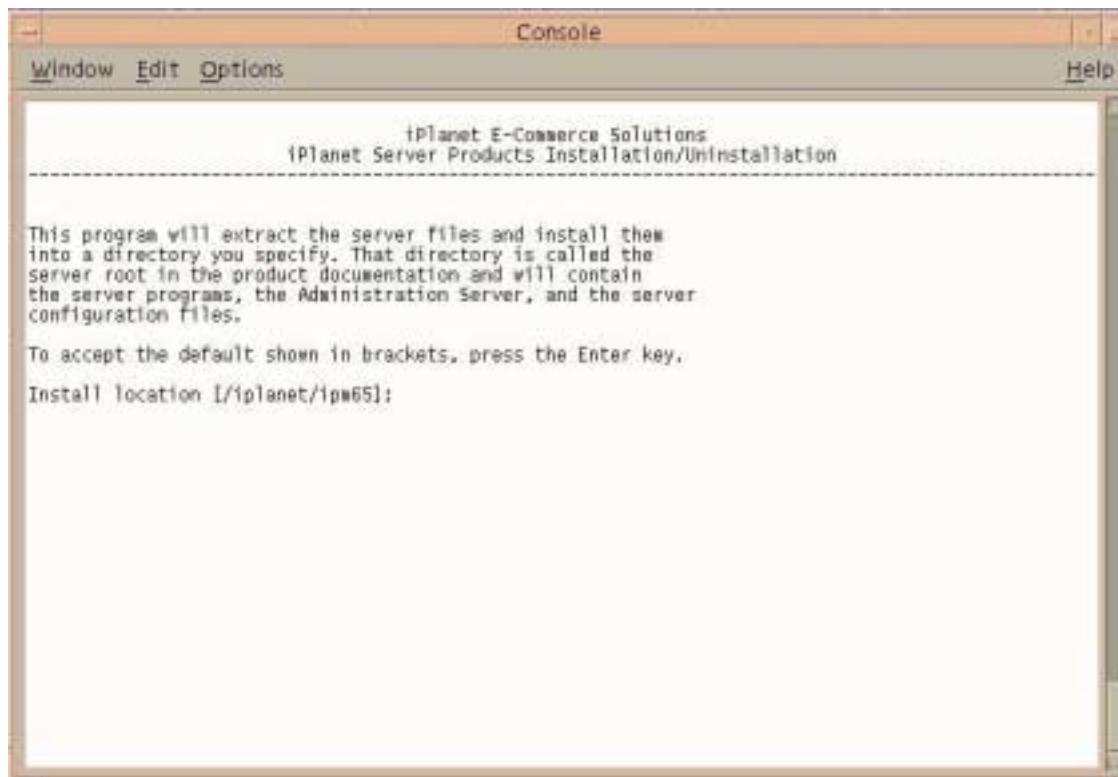
4. Press Enter to accept the iPlanet servers.

The Installation Type screen displays.



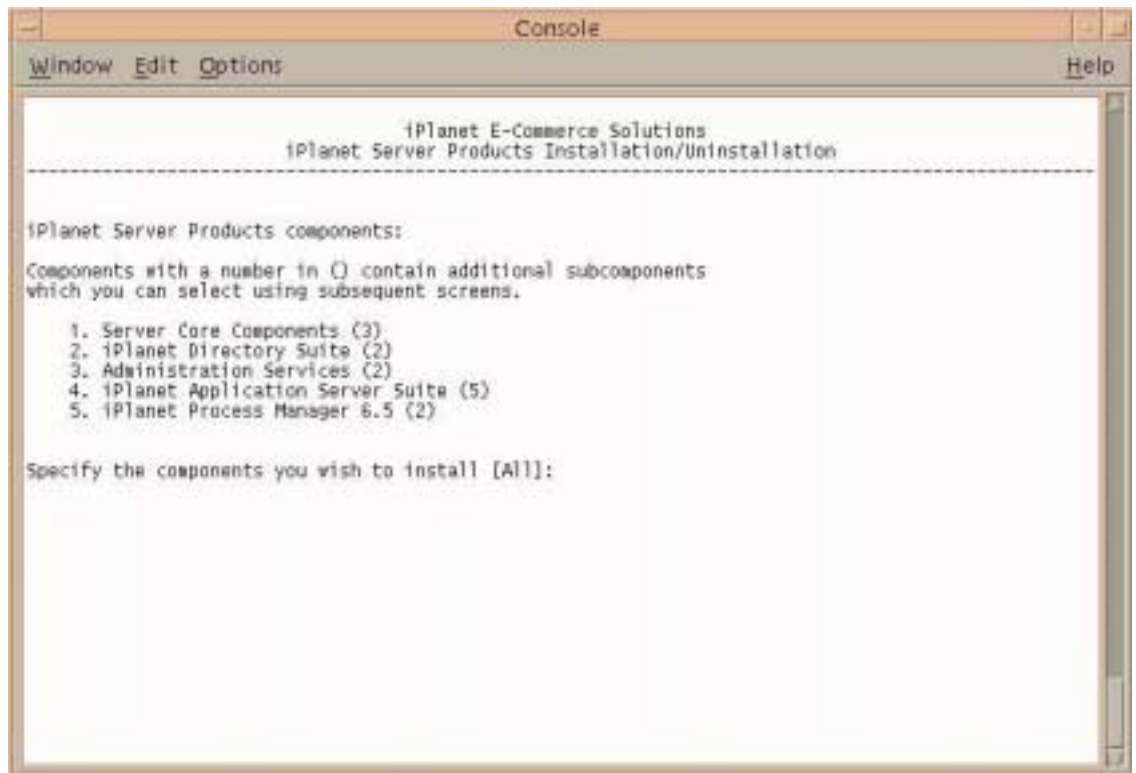
5. Press Enter to accept a typical installation.

The Extract Server Files screen displays.



6. Enter `/export/IAS65`, or enter the location where you want to install iAS.

The Server Products screen displays.



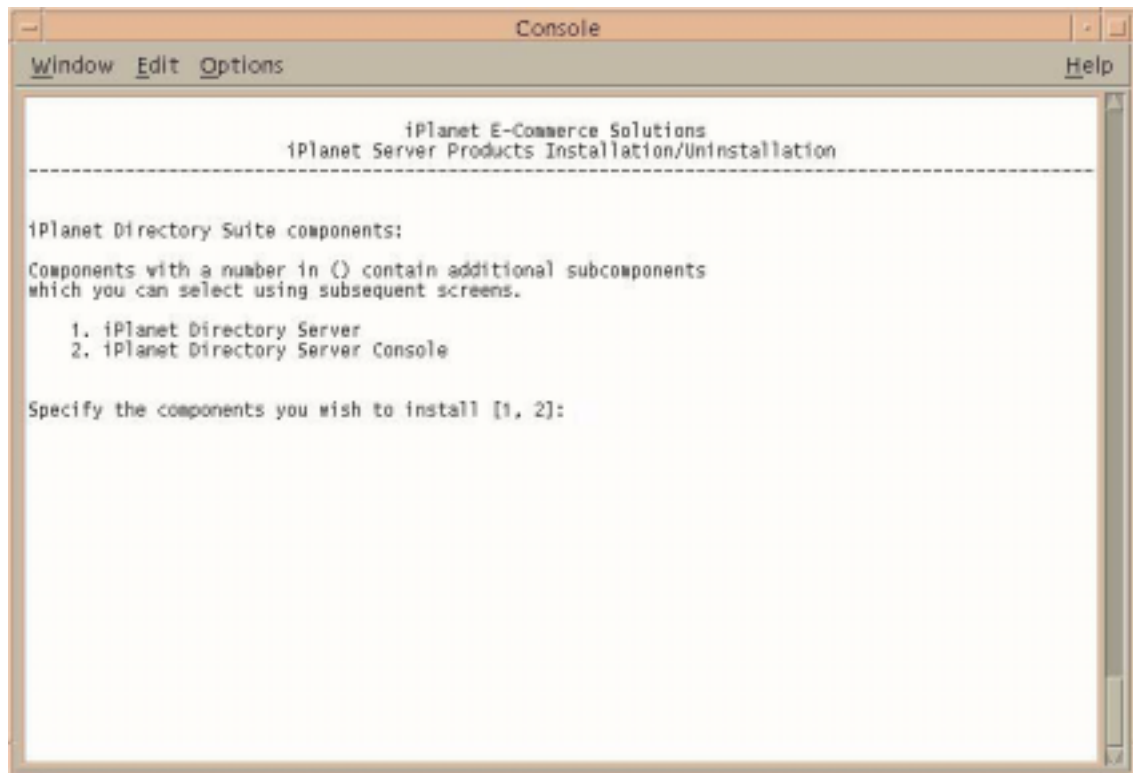
7. Press Enter, because BuyerXpert needs all the components listed.

The Server Family Core Components screen displays.



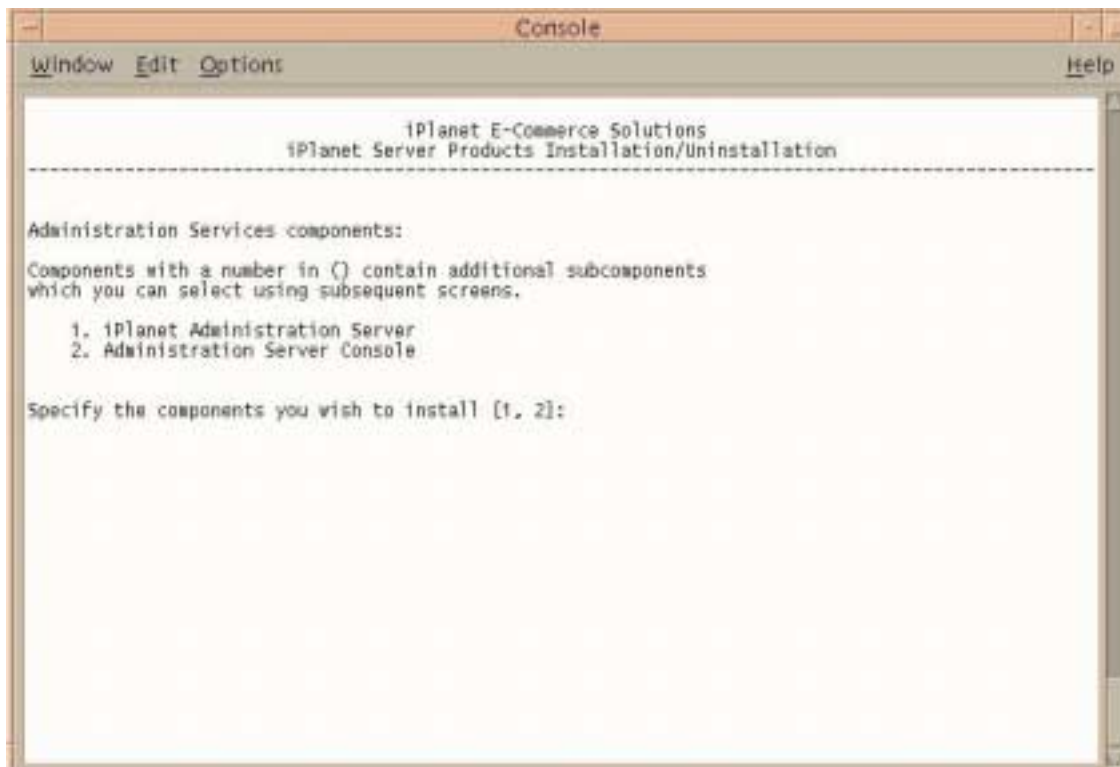
8. Press Enter to specify all the components listed.

The Directory Suite Components screen displays.



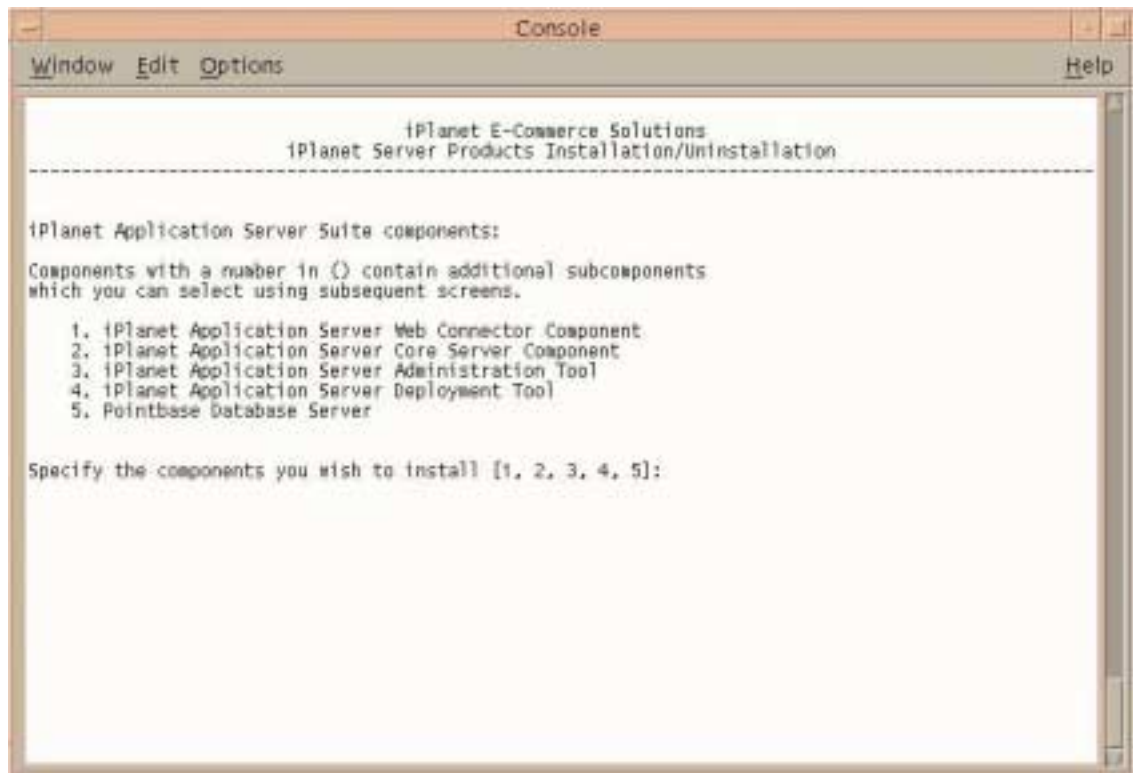
9. Press Enter to specify all the components listed.

The Administrative Services screen displays.



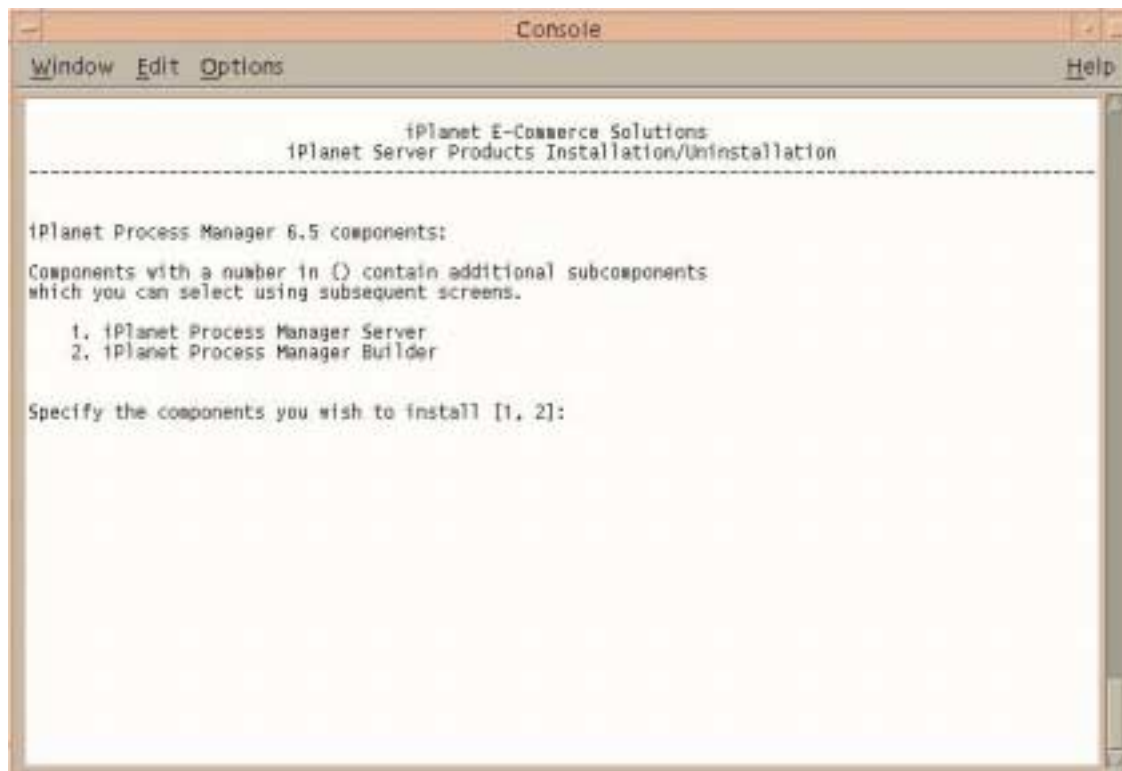
10. Press Enter to specify all the components listed.

The Application Server Suite Components screen displays.



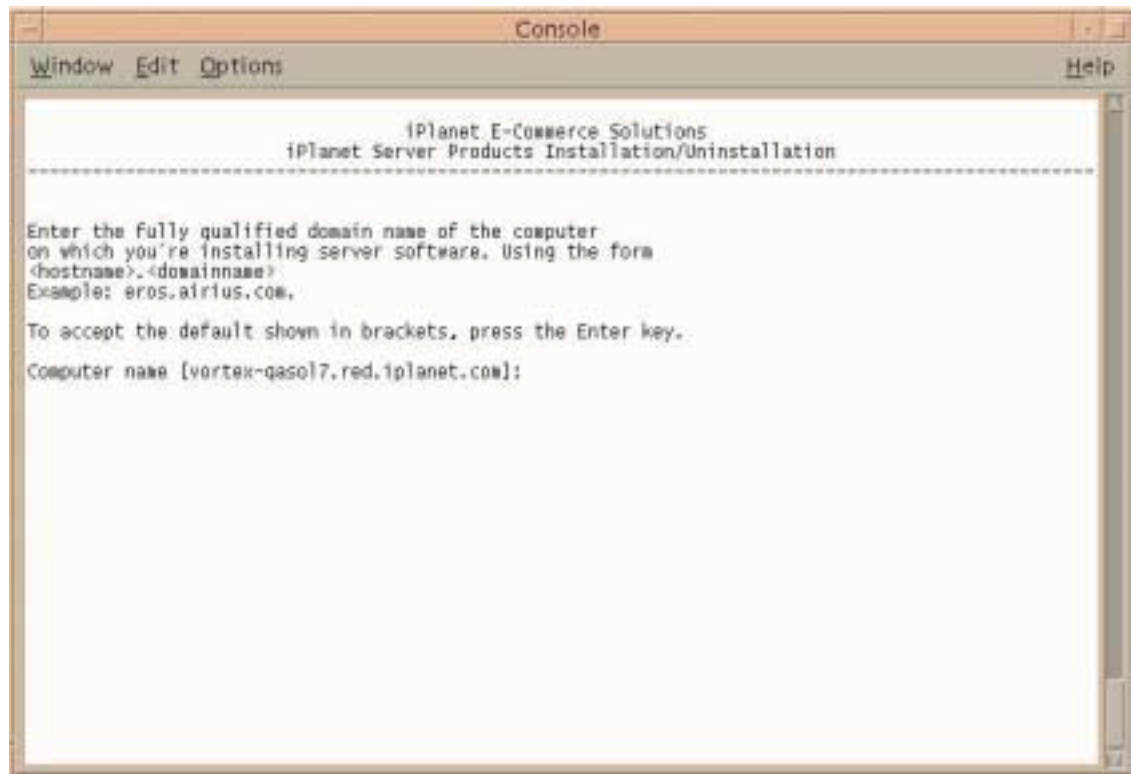
11. Press Enter to specify all the components listed.

The Process Manager 6.5 Components screen displays.



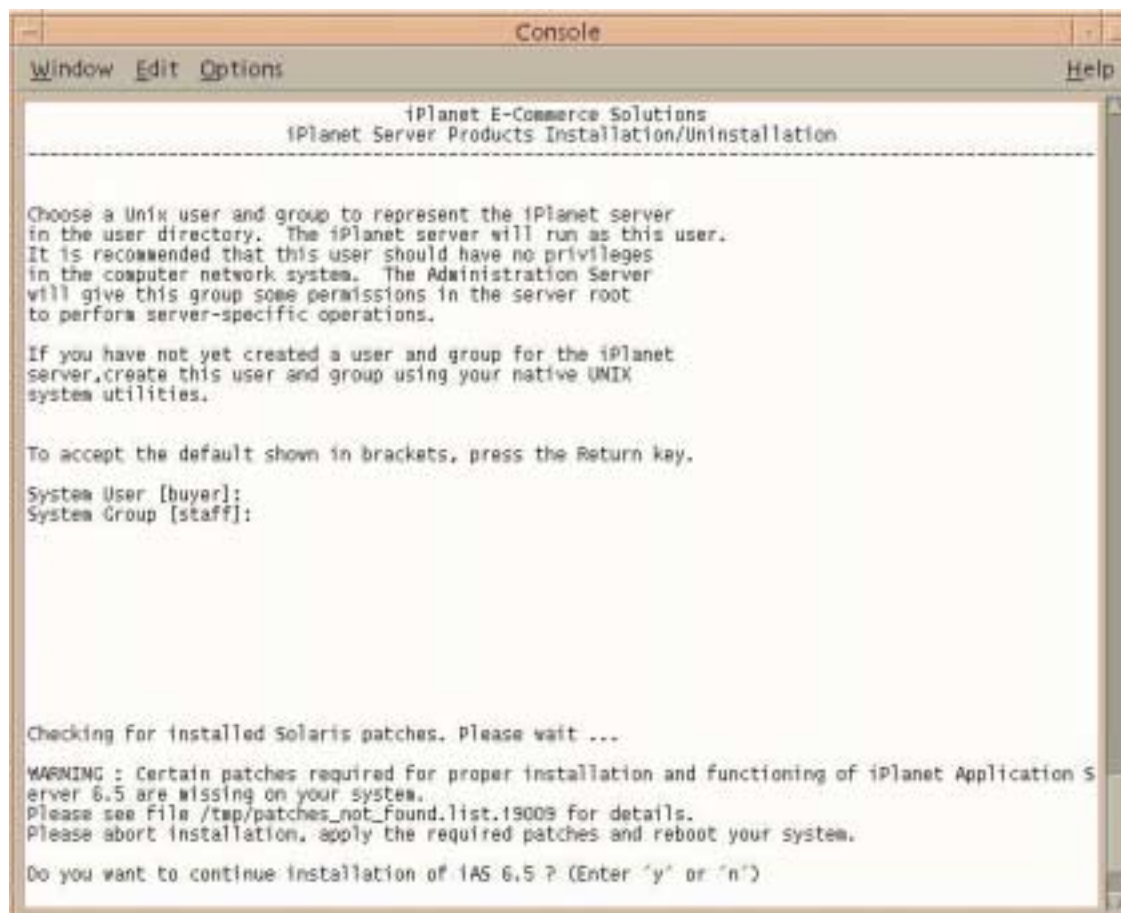
12. Press Enter to specify all the components listed.

The Domain Name screen displays.



13. Enter the domain name where you are installing the server software.
See section Installing iPlanet Web Server (iWS).

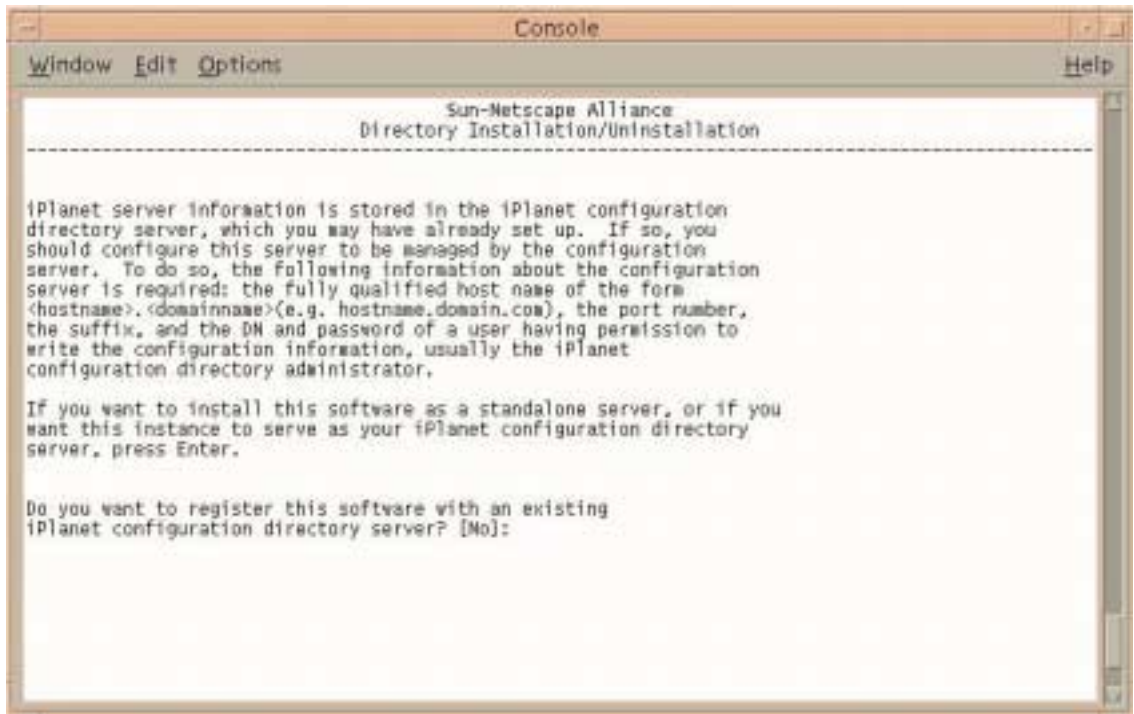
The UNIX User and Group screen displays.



14. Enter the system user and group name that was created in the section, Installing iPlanet Web Server (iWS).

If you already applied the latest patches, answer **y** to continue installing IAS6.5.

The Configuring Server screen displays.



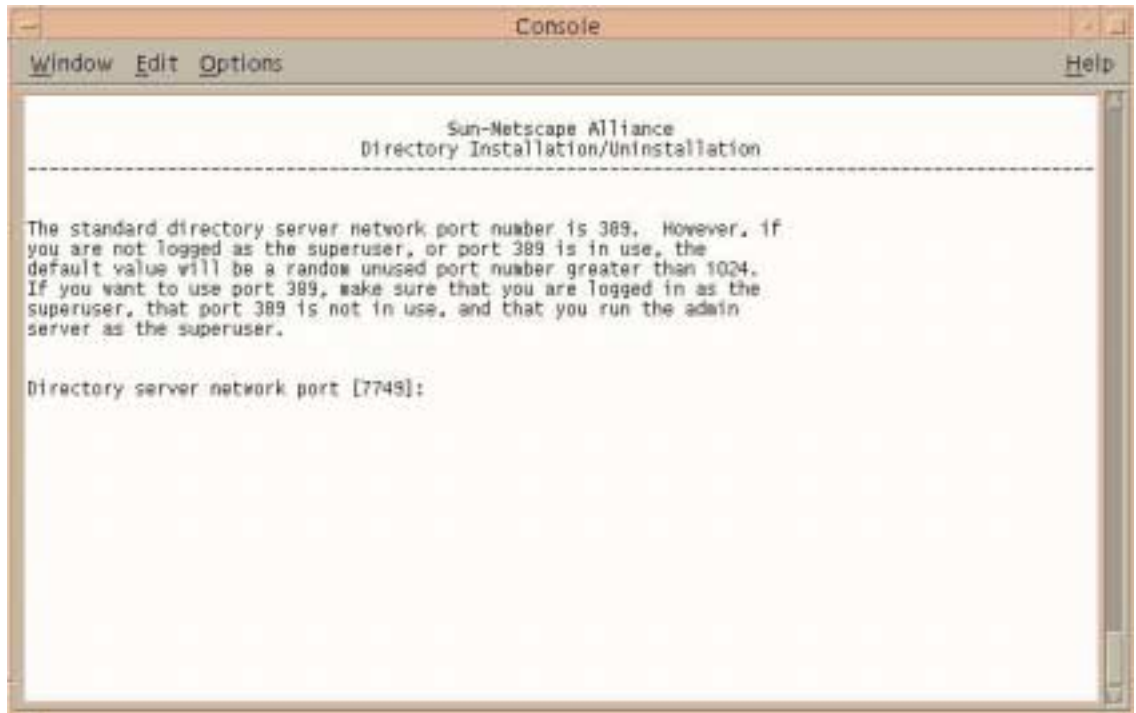
15. Enter **Yes** to register this software, or press Enter if you do not want to register the software.

The Store Directory Server screen displays.



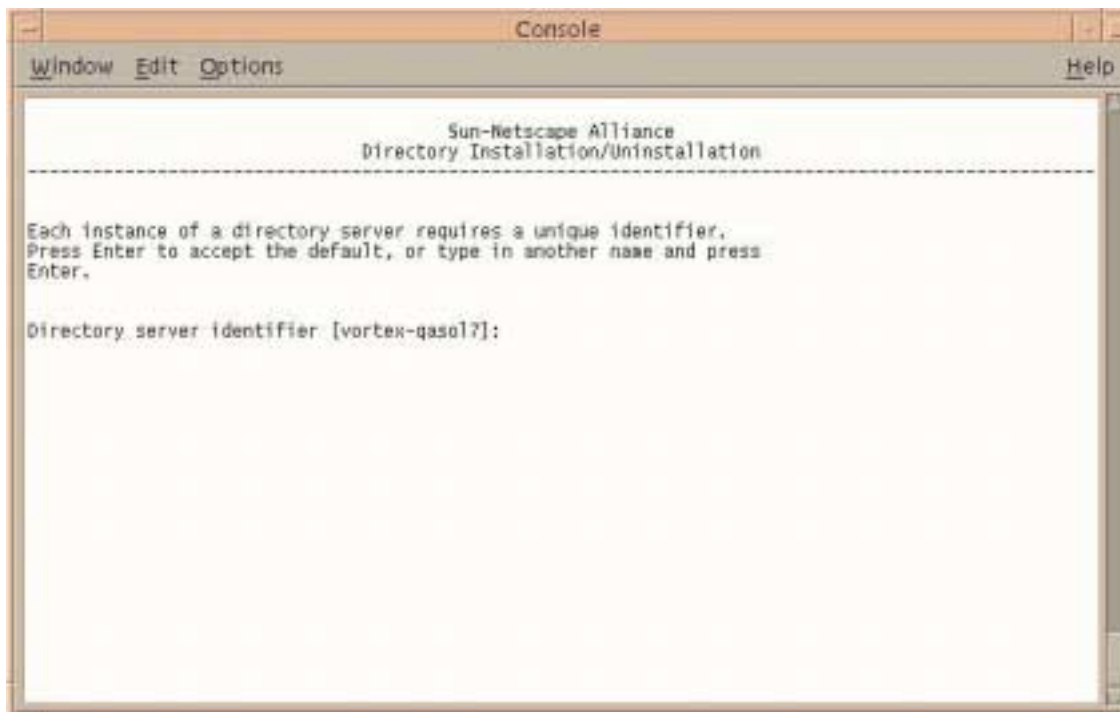
16. Press Enter to continue.

The Directory Server Network Port screen displays.



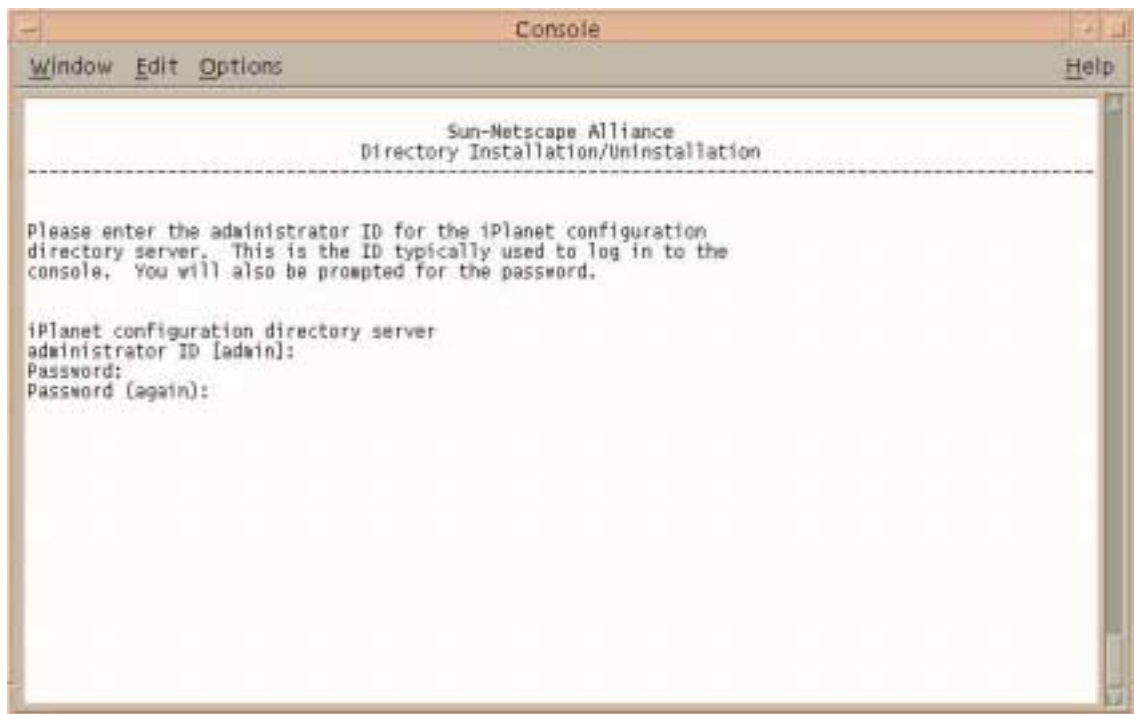
17. Enter 10000, or enter a different port number.

The Directory Server Identifier screen displays.



18. Press Enter to accept the default.

The Administrator ID screen displays.



19. Enter your administrator ID.
20. Enter your password.
21. Enter your password again.

The Directory Tree Suffix screen displays.



22. Enter a suffix for this installation (for example, `o=bxinstall.com`), or, use the default value.

The Directory Manager Distinguished Name (DN) screen displays.



23. Press Enter to accept the default Directory Manager DN.
24. Enter your password.
25. Enter your password again.

The Administration Domain screen displays.



26. Enter your domain, or accept the default.

The Administration Server Port screen displays.



27. Enter 10001, or enter your port number.

The Administration Server screen displays.



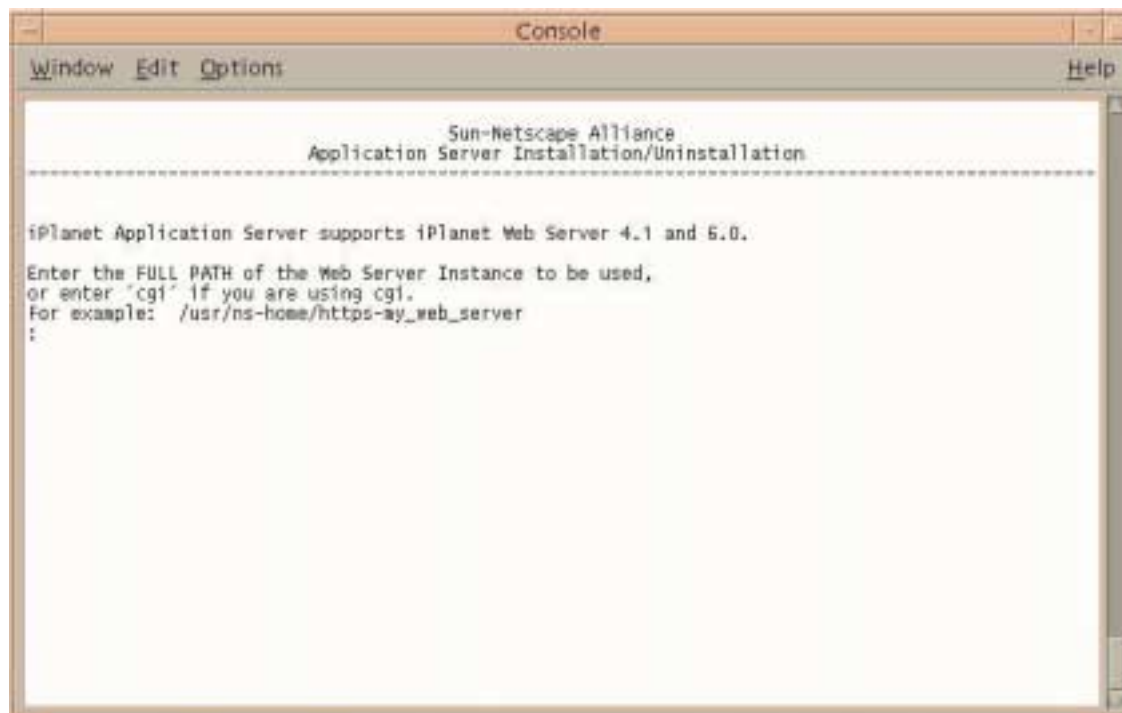
28. Press Enter to accept the default.

The Product Key screen displays.



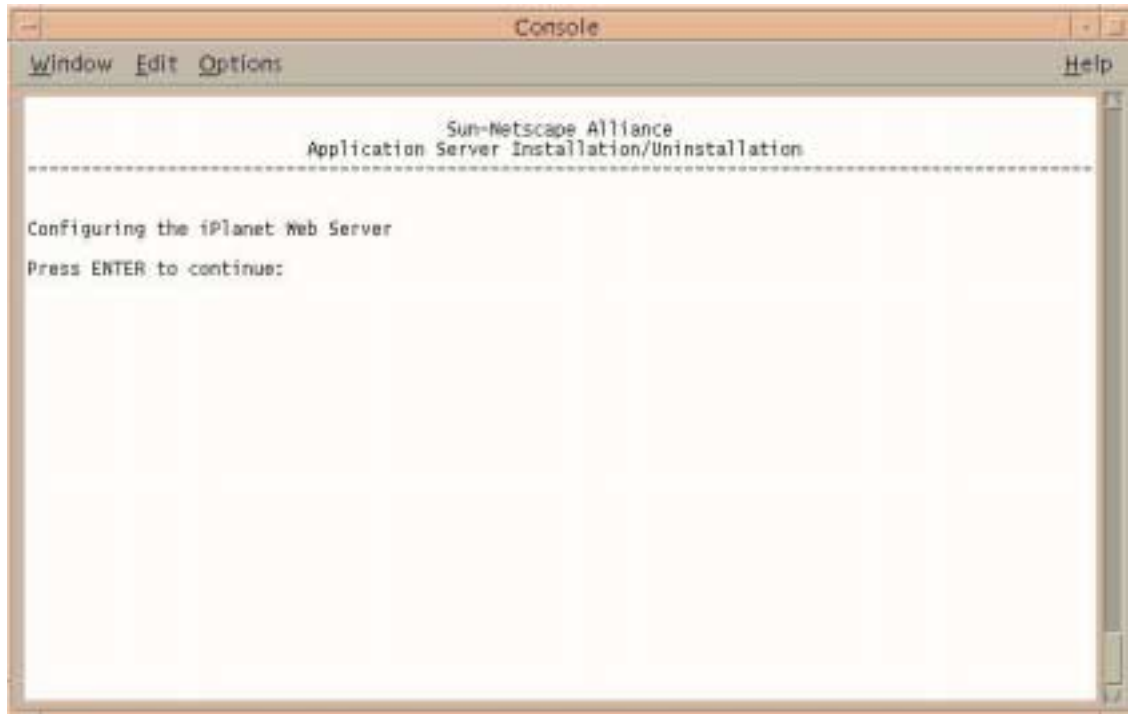
29. Enter your product key (iAS serial number).

The Web Server Instance screen displays.



30. Enter the web server instance location where iWS is installed.

The next screen displays with this message: Configuring the iPlanet Web Server.



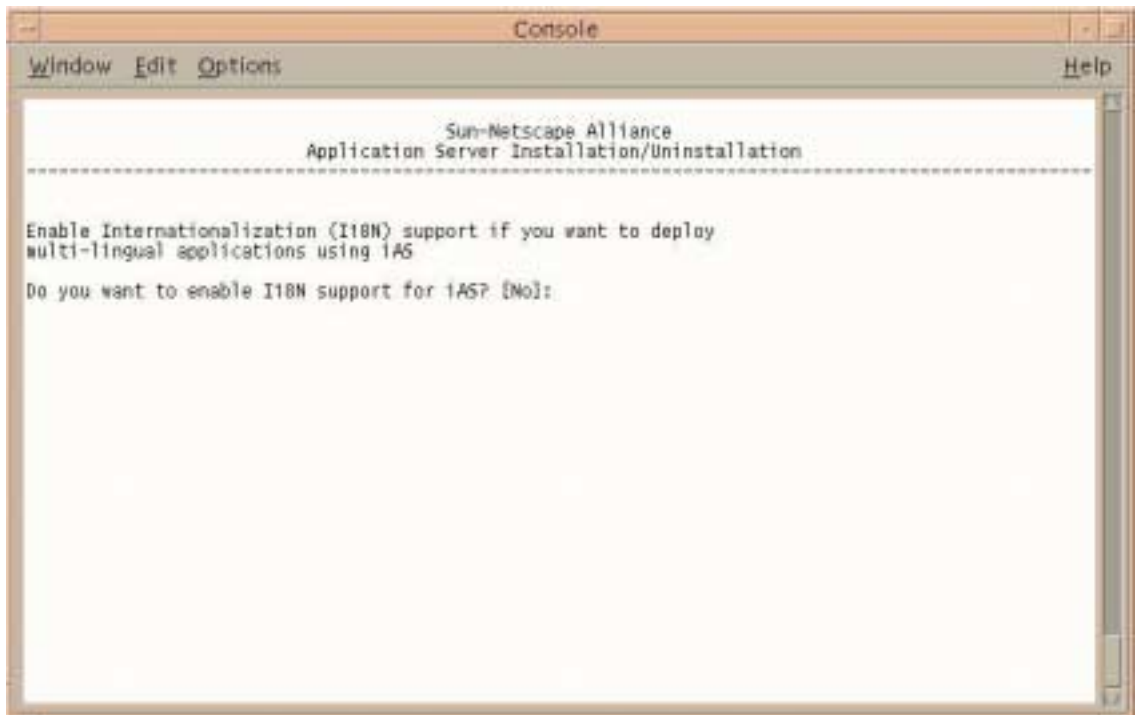
31. Press Enter to continue.

The Administration Server Username and Password screen displays.



32. Enter your administration server username.
33. Enter your password.
34. Enter your password again.

The Enable Internationalization screen displays.



35. Enter **yes** to enable international support for iAS.

The Finished with Gathering of Information screen displays.



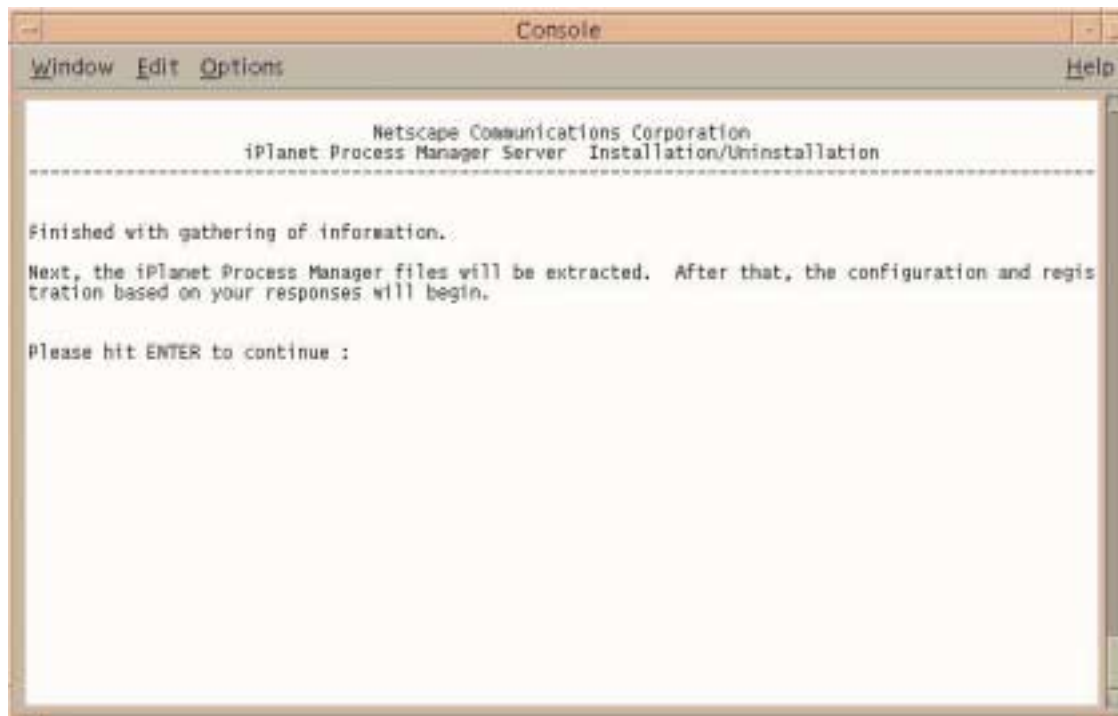
36. Press Enter to continue.

The Process Manager Administrator User ID screen displays.



37. Enter the user ID of the Process Manager administrator, or press Enter to accept the default.

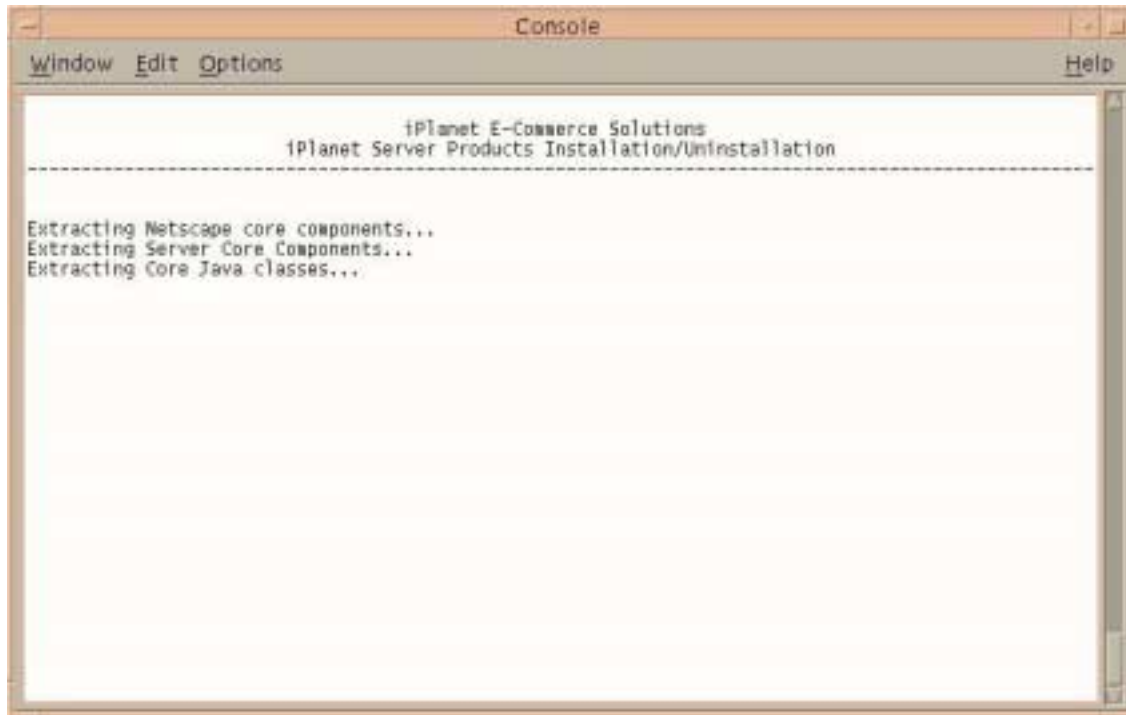
The Finished with Gathering of Information screen displays.



The installer has finished gathering information.

38. Press Enter to continue.

The Extracting Netscape core components, Server Core components, and Core Java classes screen displays.



This installation takes several minutes.

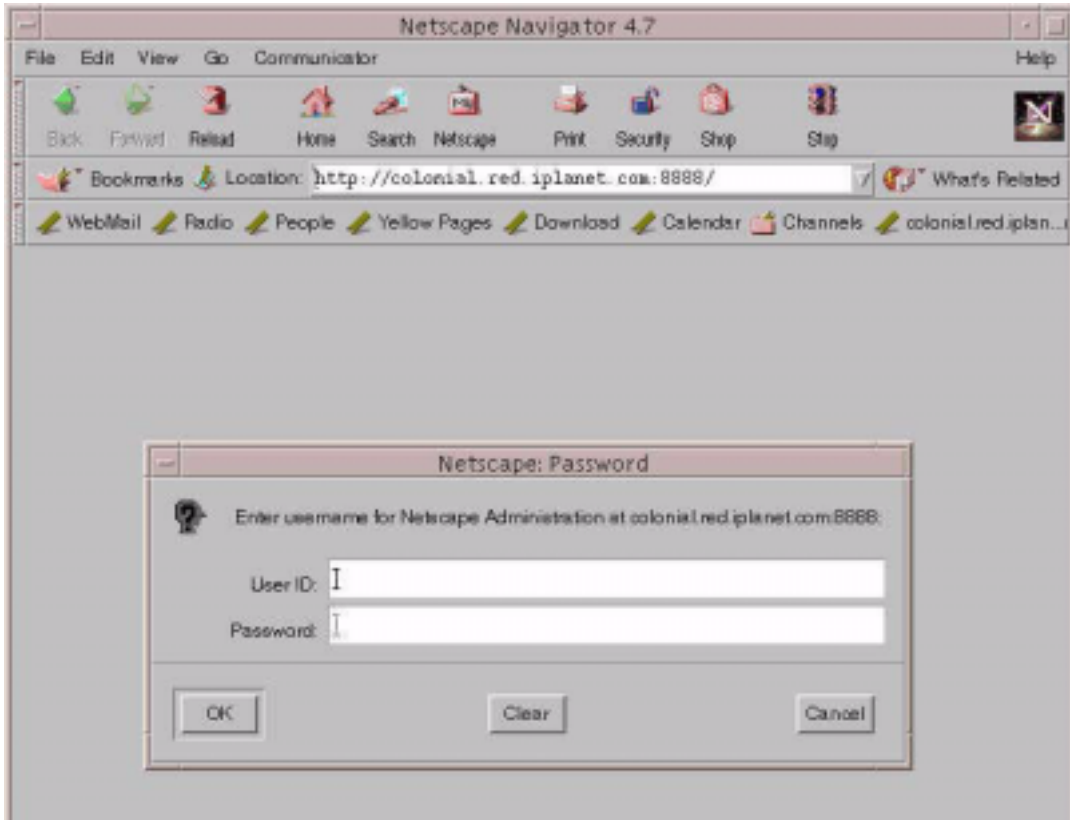
TIP To find out the version of iAS you are running, type `./version` in the `IAS_ROOT/ias/bin` directory.

Reloading Configuration Files

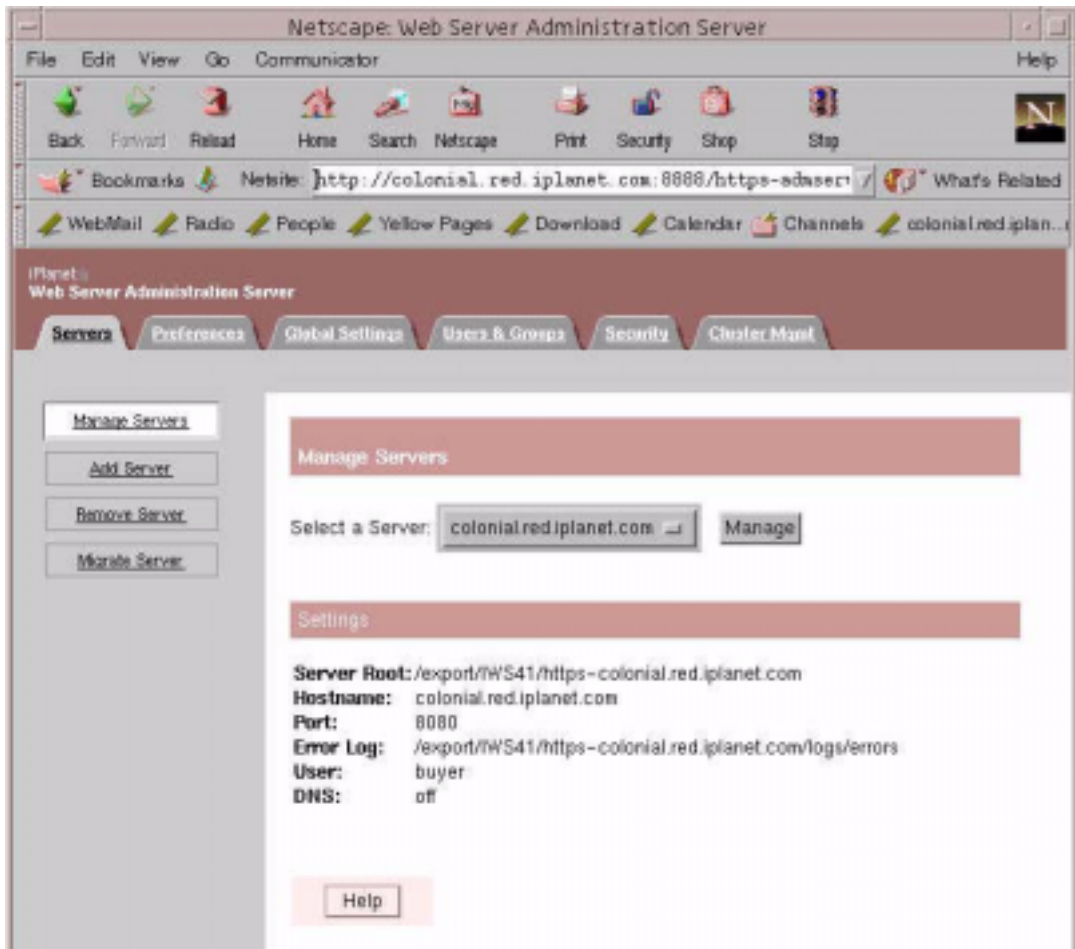
iWS needs to be stopped and started again to reload configuration files that were loaded during iAS installation.

1. Run `startconsole` from `IWS_ROOT`.

The browser launches and the login screen displays.

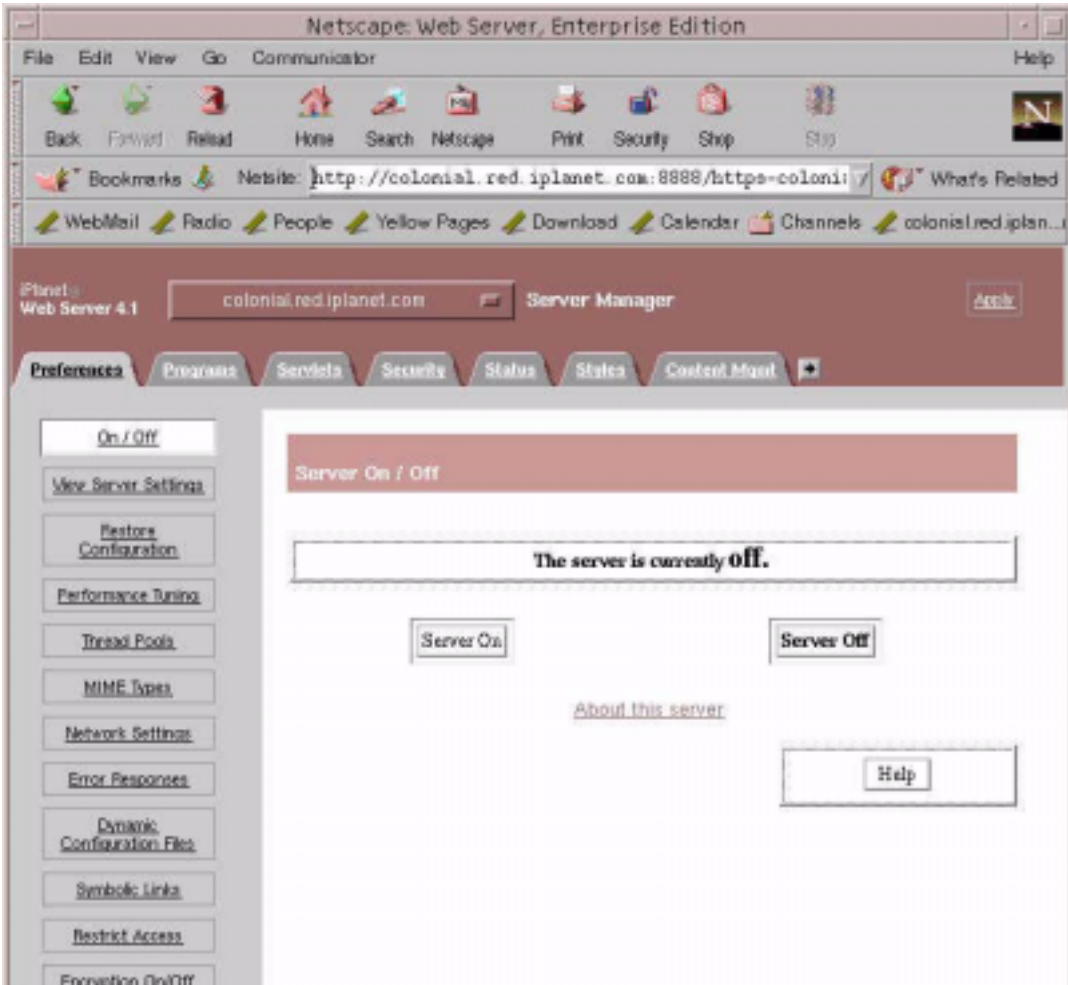


2. Enter the username you created.
 3. Enter the password you created.
- The Manage Servers screen displays.



4. Click the server name (located next to Select a Server).
5. Click Manage.

The Server On/Off screen displays.



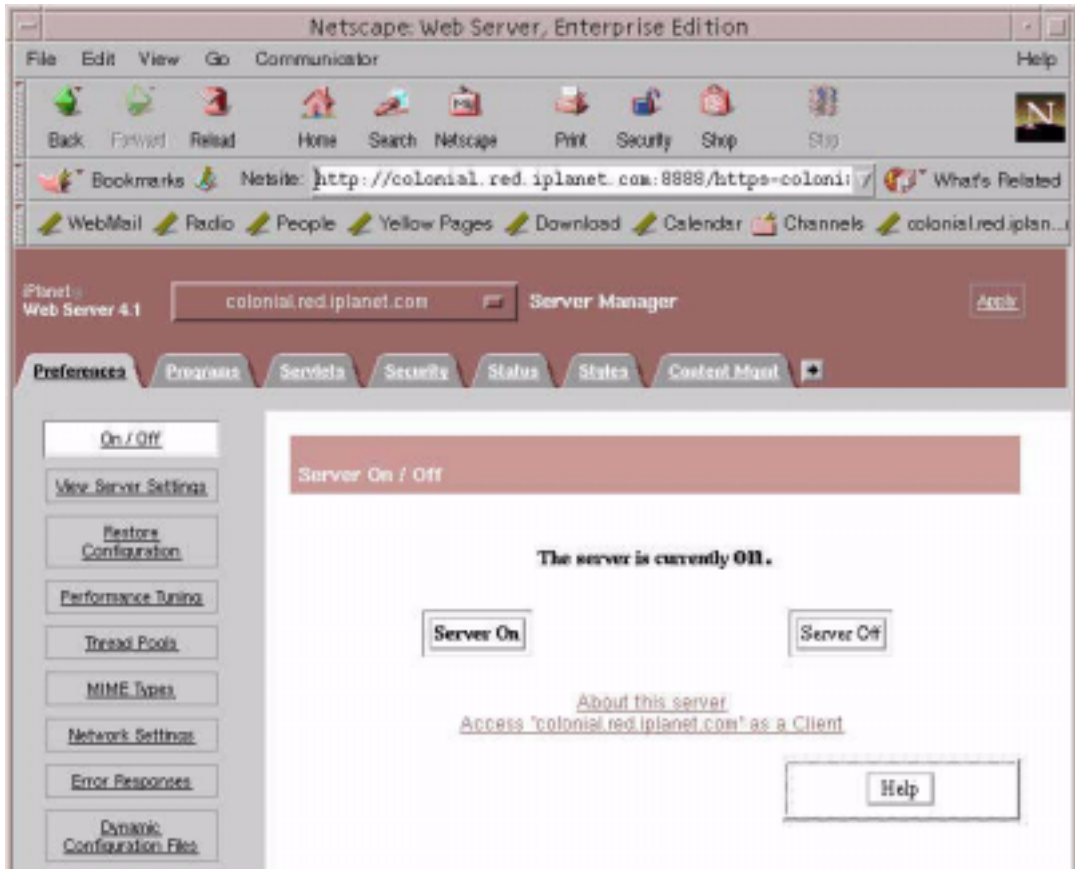
6. Click Server Off.

A Warning message displays: *Manual edits not loaded.*

7. Apply the changes by clicking Load Configuring Files.

The Server On/Off screen displays with the 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.

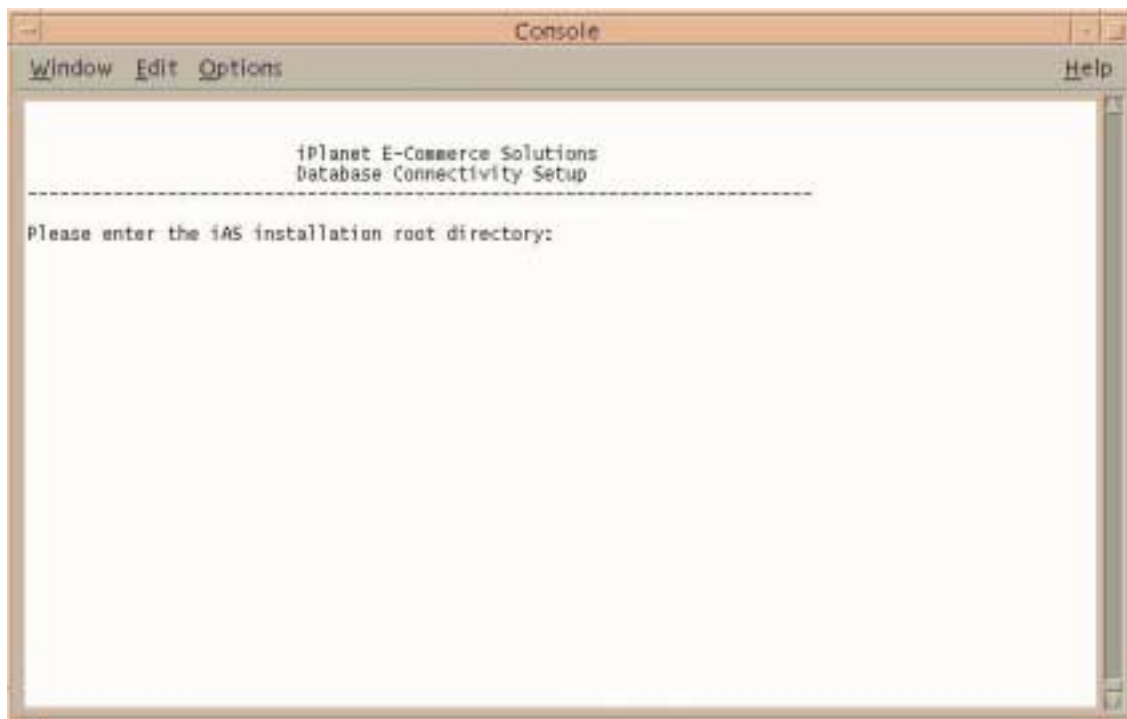
Enabling the Database with iAS

1. Set up the database session script:

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

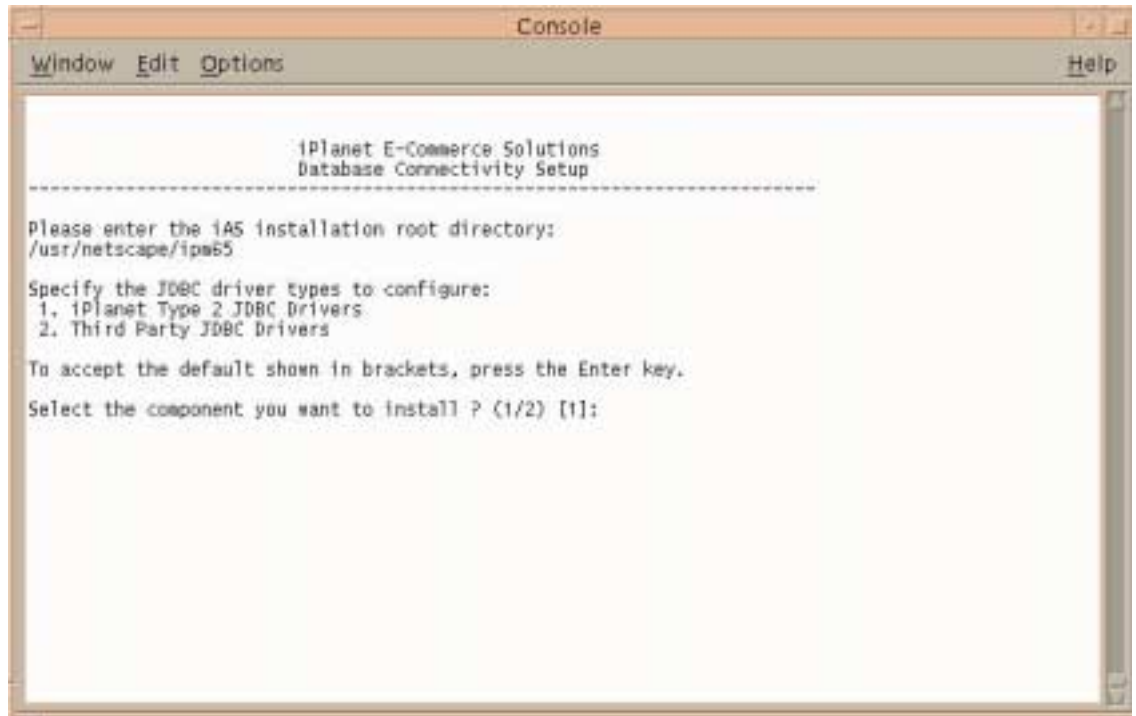
```
% ./db_setup.sh
```

The Database Connectivity Setup screen displays.



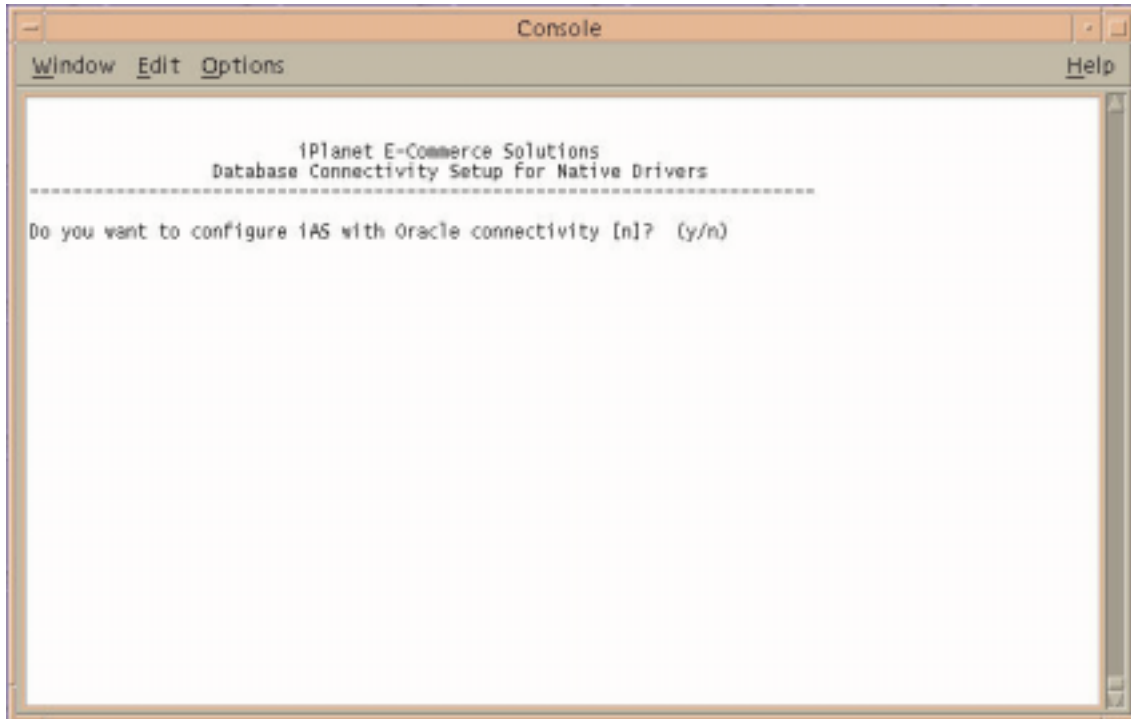
2. Enter the location where iAS is installed.

The Driver Installation screen displays.

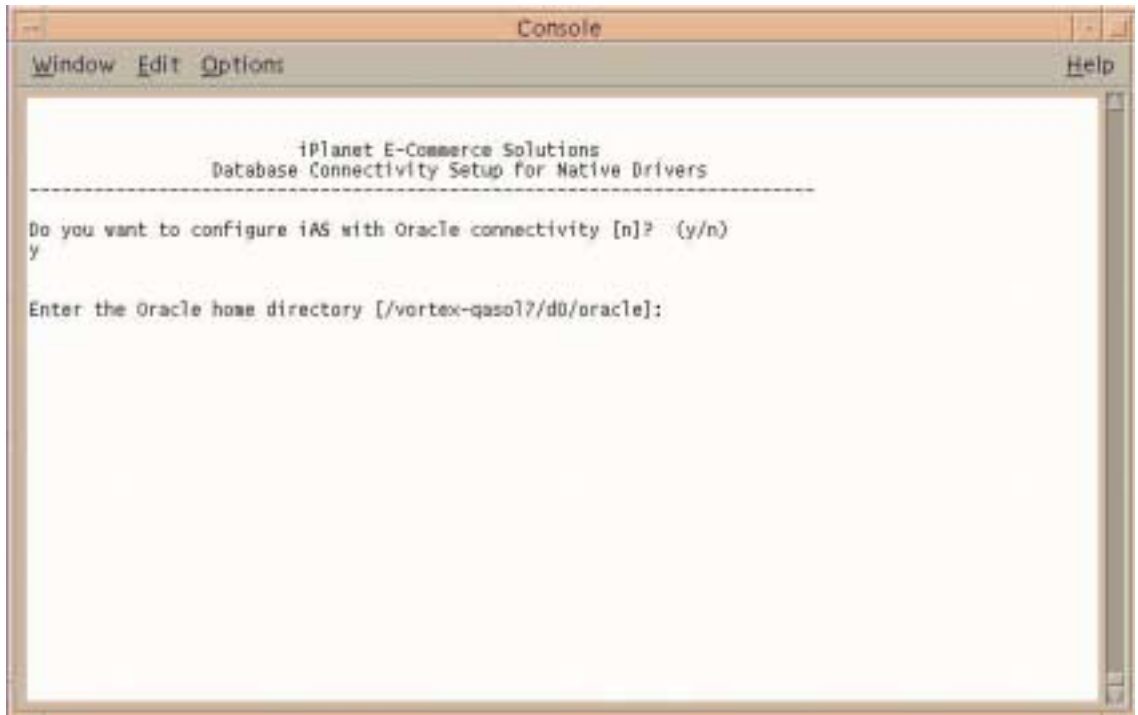


3. Press Enter to continue.

The Configuring with Oracle screen displays.

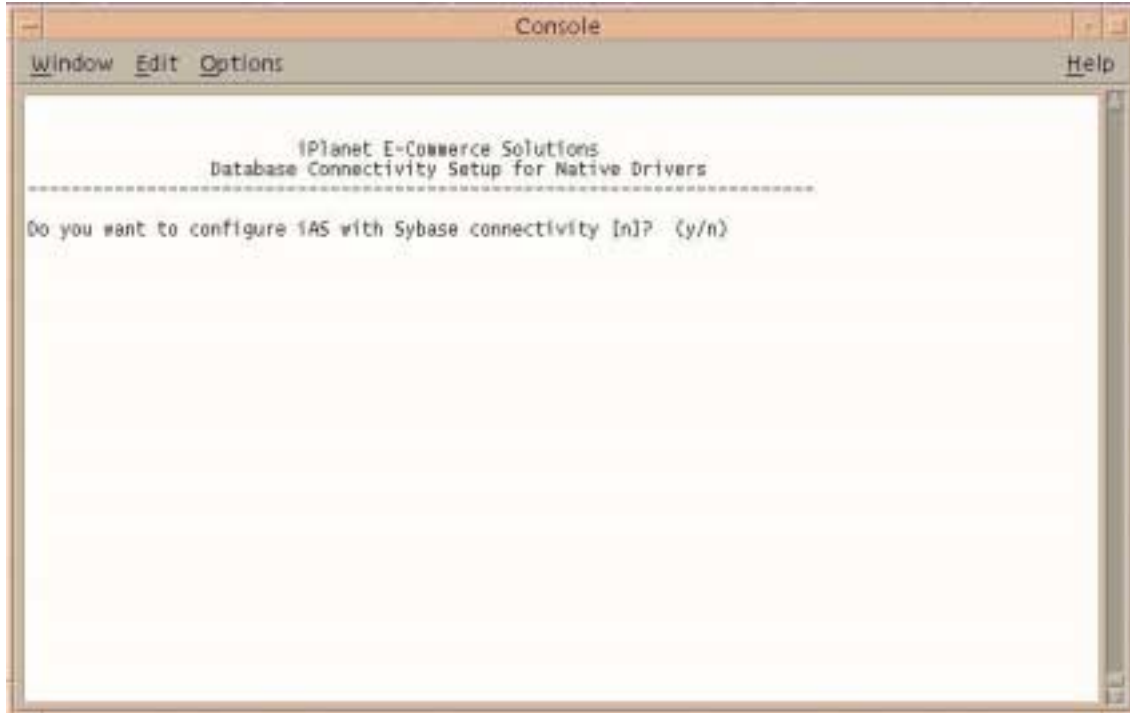


4. Enter **y** to configure iAS with Oracle.
The Oracle Connectivity screen displays.



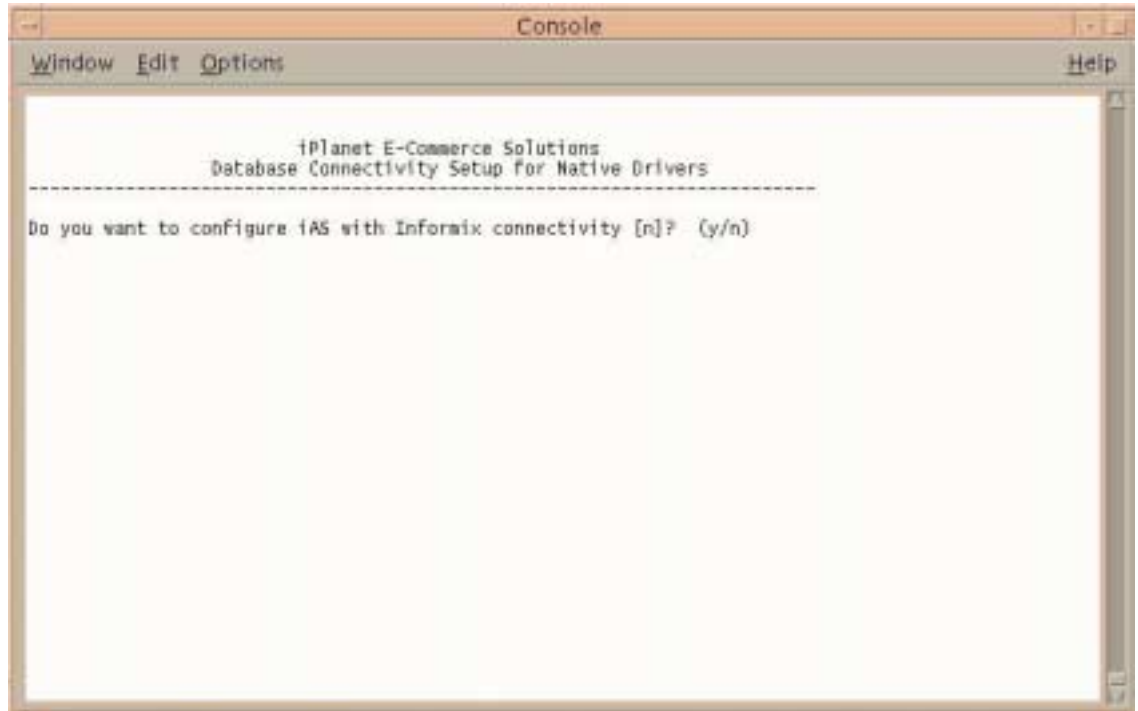
5. Enter your Oracle home directory.

The Configure iAS with Sybase Connectivity screen displays.

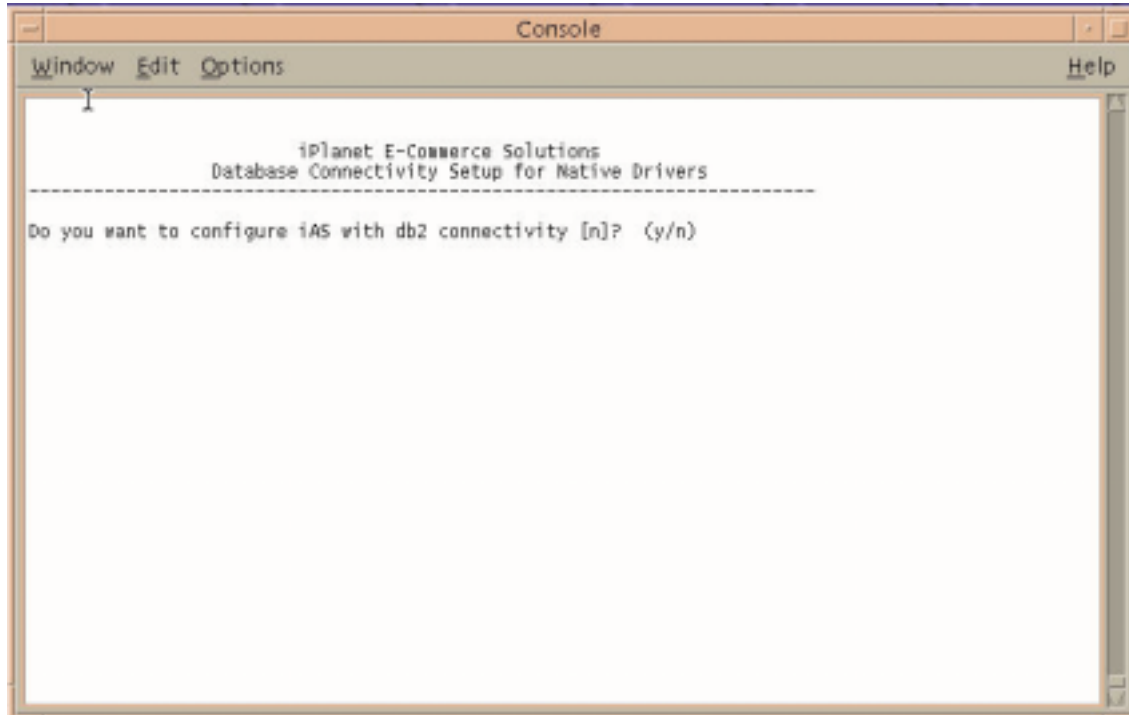


6. Press Enter to continue.

The Informix connectivity screen displays.



7. Press Enter to continue.
The db2 connectivity screen displays.



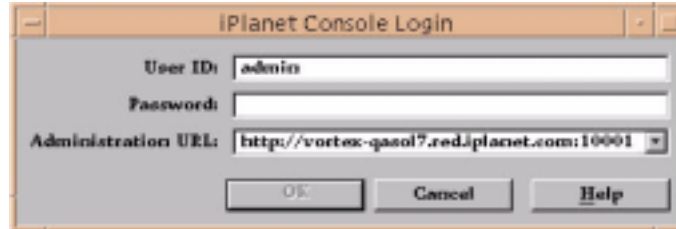
8. Press Enter.

Creating an iPlanet Directory Server (LDAP) Instance

1. Start console using the following command:

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

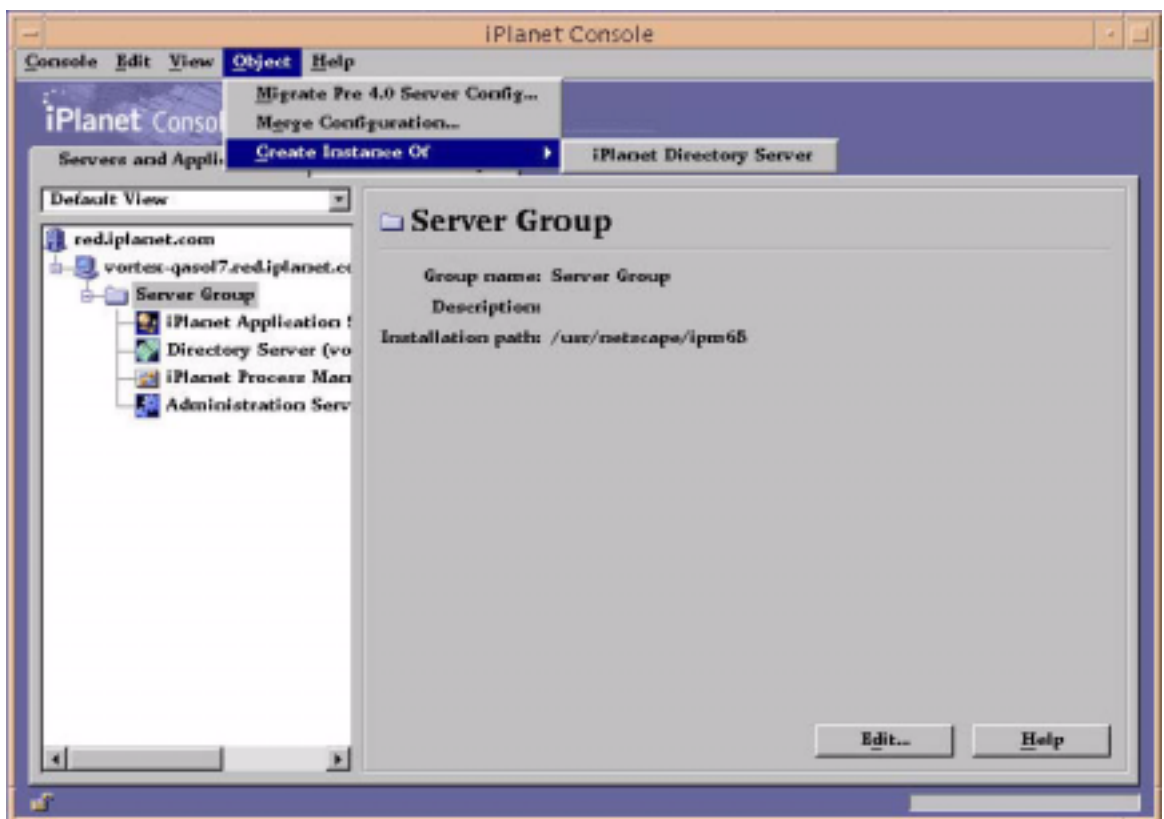
The LDAP login screen displays.



2. Enter your password.
3. Click OK.

This is the password you specified in the iAS installation

The Server Group screen displays.



4. Choose the Server Group.

5. Click Object.
6. Choose Create Instance of Netscape Directory Server from the drop-down menu.

The Create New Instance screen displays.



The screenshot shows a dialog box titled "Create New Instance" with the following fields and values:

Server identifier:	vortex-qasol72
Network port:	1567
Base suffix:	dc=red,dc=iplanet,dc=com
Directory Manager DN:	cn=Directory Manager
Directory Manager Password:	
Confirm password:	
Server Runtime (UNIX) user ID:	buyee

Buttons: OK, Cancel, Help

7. Enter 20000, or your specific port number, in the network port number field.
8. Enter a Base suffix. For example, `o=iplanet.com`.
9. Create a password.
10. Enter the password again to confirm.
11. Click OK.

NOTE The network port number and root DN password are required entries when installing iPlanet BuyerXpert.

The Status screen displays.



12. Click OK.
13. Exit from the iAS administrative server.

Configuring the Process Manager

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

Creating Another Oracle User

To create another Oracle user:

```

% sqlplus system/manager@oracle_SID

SQL>create user pm identified by pm

SQL>default tablespace TS01 temporary tablespace temp

SQL>quota unlimited on TS01

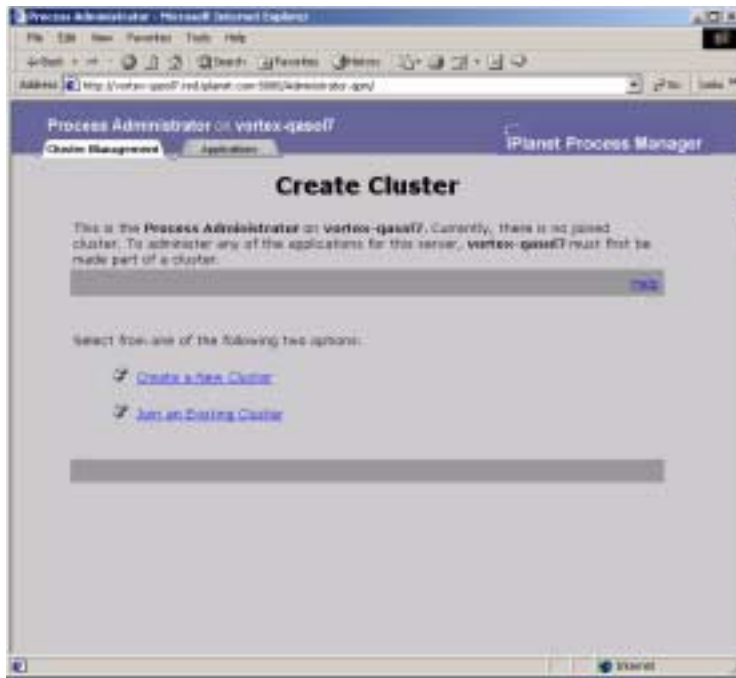
SQL>quota 0 on system;

SQL>grant connect, resource to pm
  
```

To configure the Process Manager:

1. Enter the URL:
`http://<machine-name.domain-name:iWS-port-number>/Administrator.apm`
2. Enter your iAS user ID.

3. Enter your iAS password.



4. Select Create New Cluster.
The Create Cluster screen displays.



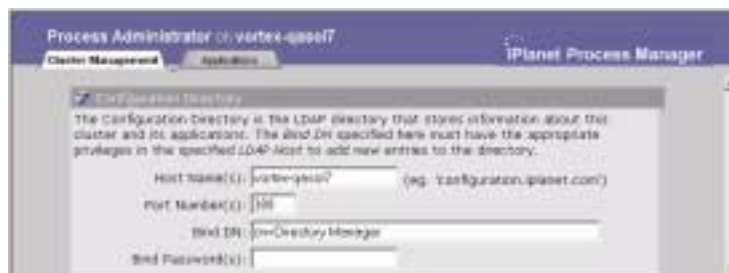
5. Enter a Cluster Display Name.
6. Scroll down to the Corporate User Directory section.



7. Enter your Host Name.
8. Enter 2000 in the Port Number field.
9. Specify the Base DN for the root directory.

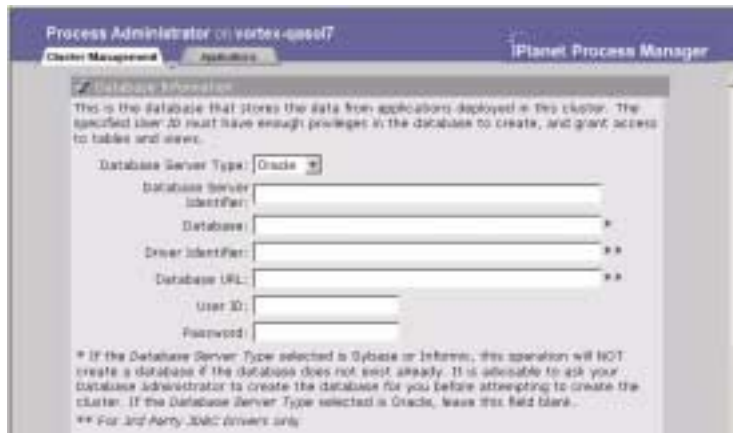
This is the network port number that you created in Chapter 3, Section Creating an iPlanet Directory Server (LDAP) Instance.

- For example, enter `o=iplanet.com` if your BuyerXpert configuration setting directory root DN is set to `o=iplanet.com`.
10. Scroll down to the Configuration Directory section.



11. Enter the iAS directory server network Port Number.
12. Enter the bind password (your iAS password).

13. Scroll down to the Database Information section.



14. Select Oracle from the DB Server Type drop-down menu.
15. Enter your Oracle SID in the Database Server Identifier field.

NOTE Leave the Database field blank. That field is marked with a *.

16. Enter the Oracle database User ID that was created earlier.
17. Enter the Oracle Password that was created earlier.

Scroll down to get the email screen.

NOTE The database user account is fixed for the life of the installation and is where specific application and configuration tables are stored.

Do not assign the same location where you store the BuyerXpert data.

The Mail Server Information screen displays.

24. After the cluster has been created, from any text editor, copy the lines that start with `# Begin Cut -----` to the end (`End Cut -----`).
25. Open the *iAS installation dir*/builder/preferences.ini file.
26. Find the following line in that file:
`# add your lines below here:`
27. Add the lines copied in Step 24 to just below the `# add your lines below here: line`.
28. Save the file.

Installing BuyerXpert

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

- Preparing to Unload the Distribution Media
- Verifying the Database and Server Installations
- Information About Sample Data
- Pre Installation Setup for Requisition Archival/Restore
- Installing BuyerXpert Software
- Post Installation Configuration for Requisition Archival/Restore
- Running the Process Builder
- Importing Timecard Application
- Preparing the Seed Data Storage

Preparing to Unload the Distribution Media

For some of the installation tasks, you need to work in a temporary directory called a staging area. Extract the contents of the distribution media into this staging area. In the example installation, the staging area is a directory called *stage*. You can give this temporary area any name that you want.

iPlanet recommends you install the BuyerXpert software behind the firewall.

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

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

BuyerXpert CD-ROM Contents

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

`buyerxpert45.tar`

Verifying the Database and Server Installations

Make sure you have the following software installed and running:

- Oracle Server Database 8.1.7 or 9i 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, SP9 or higher
- iPlanet Application Server (iAS) 6.5

Information About Sample Data

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

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

Sample Data in Directory Server

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

Sample Data in Oracle

The sample data in Oracle is 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 prevents any conflicts with or overwriting or loss of the sample data.

Switching between using the sample data and real data (and vice versa) requires that you only reconfigure the BuyerXpert installation.

Pre Installation Setup for Requisition Archival/Restore

The following sections provide details on setting up, configuring and using the Requisition Archival/Restore feature in BuyerXpert 4.5.

Pre Installation Setup

The Archival implementation in BuyerXpert uses the Global Transaction support available in iPlanet Application Server(iAS) 6.5.

Global Transactions

Global transactions are a set of related operations that must be executed as a unit, though each operation may run in a different process. You can update multiple databases that are distributed over different geographic locations, or update multiple databases of different types (such as Oracle and Sybase) in a single global transaction. A global transaction typically involves operation on multiple databases.

Running db_setup.sh

iPlanet

Database Connectivity Setup

-
1. Please enter the iAS installation root directory:
<IAS_ROOT>
 2. Specify the JDBC driver types to configure:
 - o iPlanet Type 2 JDBC Drivers
 - o Third Party JDBC Drivers
 3. To accept the default shown in brackets, press the Enter key.
 4. Select the component you want to install ? (1/2) [1]:
2
 5. Provide following information to configure third party JDBC drivers.
 6. To accept the default shown in brackets, press the Enter key.
 7. Enter the number of Drivers you want to configure ? [1]:
1
 8. Gather information to configure third party JDBC drivers.
 9. Enter the JDBC Driver name: [Driver1]:
Archive
 10. Enter Driver Classpath
For example, /space/nsadmin/817client/jdbc/lib/classes12.zip

`<ORACLE_HOME>/jdbc/lib/classes12.zip`

11. Enter Pooled Datasource Classname

For example, `oracle.jdbc.pool.OracleConnectionPoolDataSource`

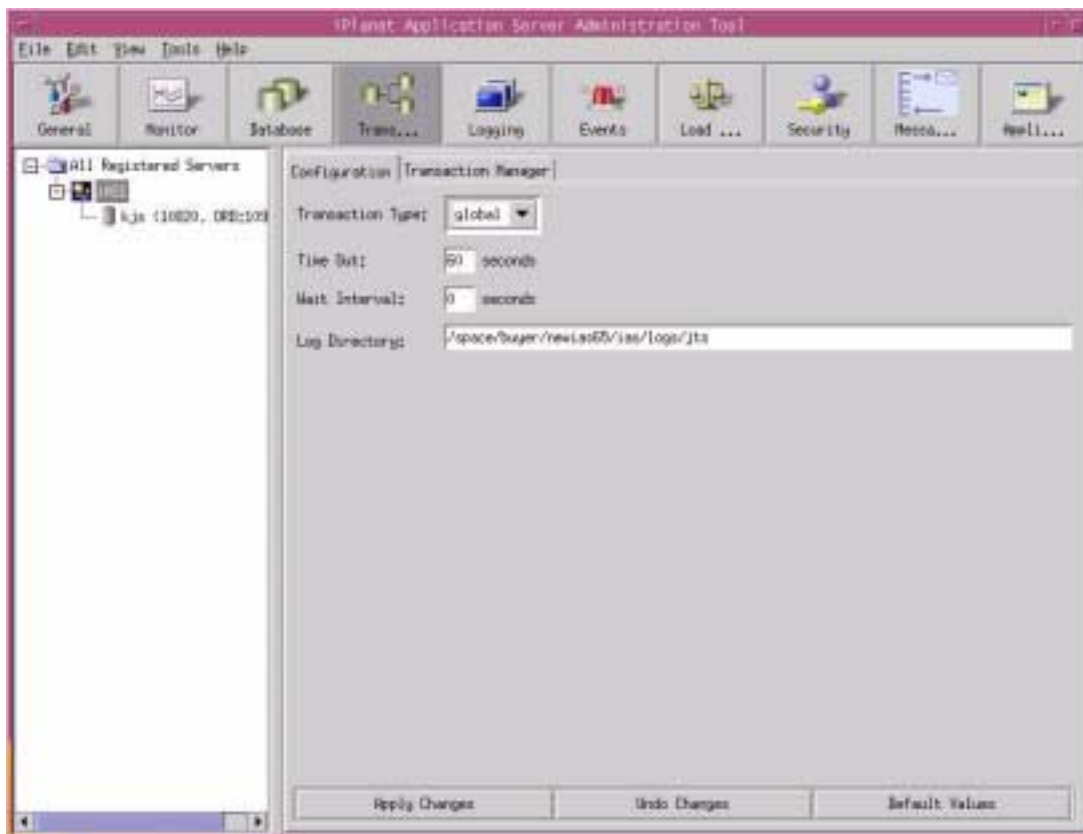
12. Enter the XA Datasource Classname (optional)

For example, `oracle.jdbc.xa.client.OracleXADataSource`

Enable Global Transactions in IAS

The Global Txns are enabled through the `ksvradmin` utility. This is found in `<IASHOME>/ias/bin`. Before running it, ensure that your `DISPLAY` environment is properly set.

The following screen image of `ksvradmin` shows how to enable Global transactions.



Verify the configuration details

From the `ksvradmin` utility you can check that all the data that you entered during `db_setup.sh` is correct. The following screen shows where to check:

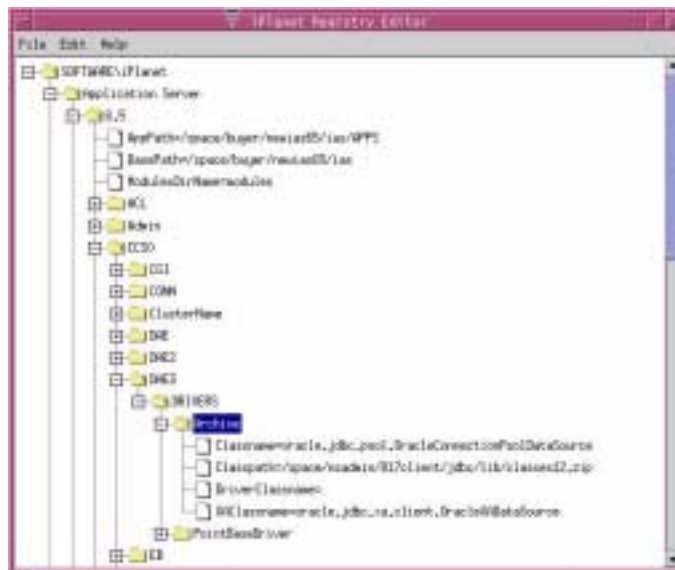


Make sure that the changes are correct. If they are not correct, you can make the changes in kregedit in the following location:

```
Software\iPlanet\Application
Server\6.5\CCSO\DAE3\Drivers\

```

The following screen shows the location.



Installing BuyerXpert Software

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

To install the SellerXpert software from the CD:

1. Copy the `buyxpert45.tar` file to a local directory.
2. Extract the file: `tar xvf buyxpert45.tar`
3. Execute `setup`.

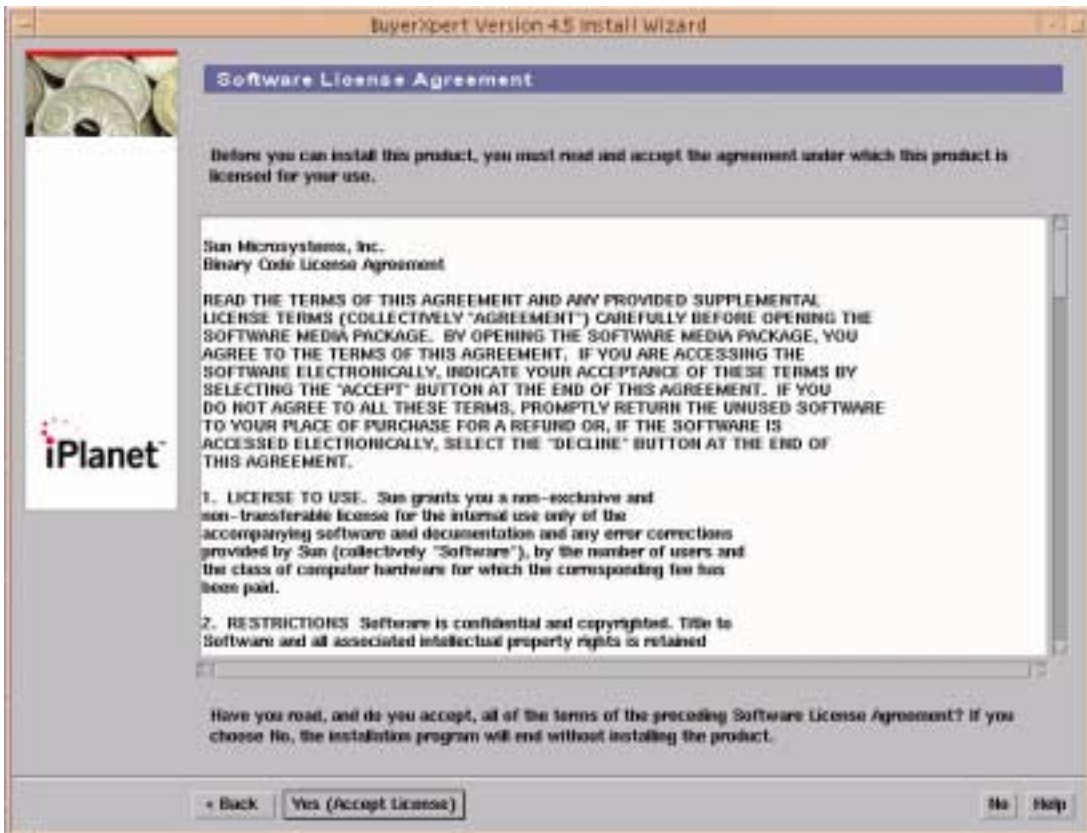
Make sure that the `DISPLAY` environment is set correctly.

The Welcome screen displays.

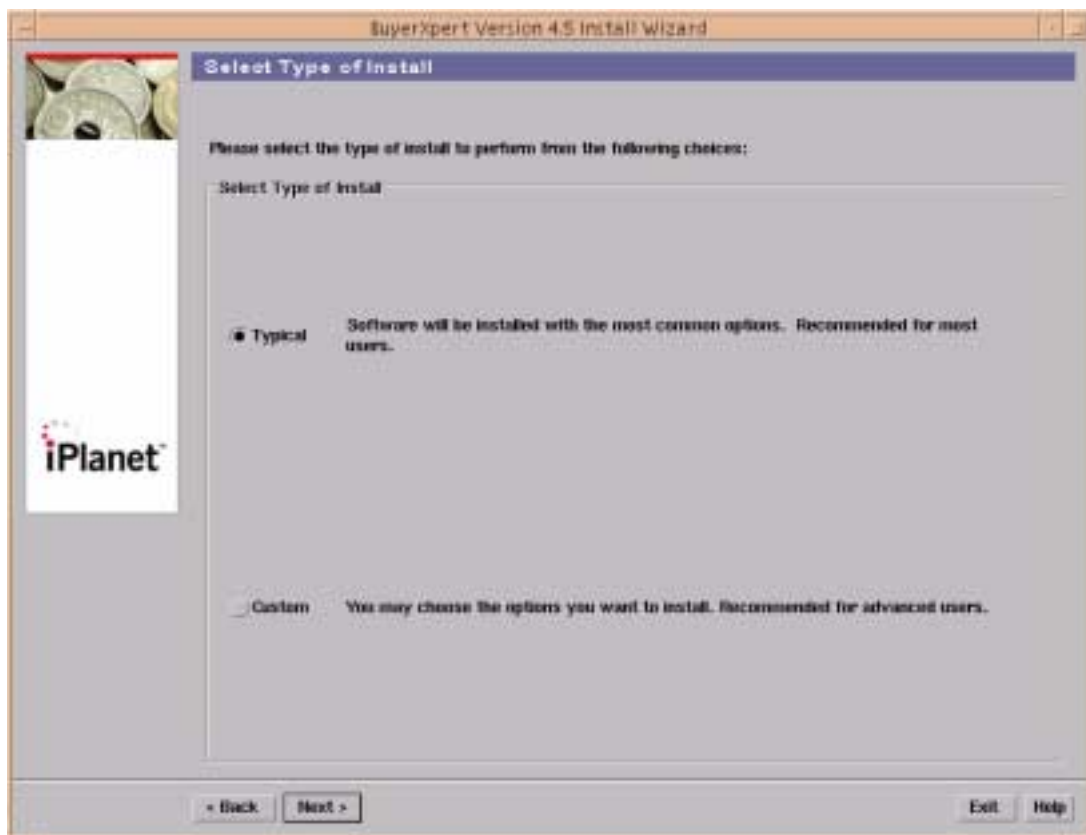
Figure 4-1 Welcome screen

4. Read the Welcome message.
5. Click the Next button to continue the installation.
The Software License Agreement screen displays.

Figure 4-2 Software License Agreement screen

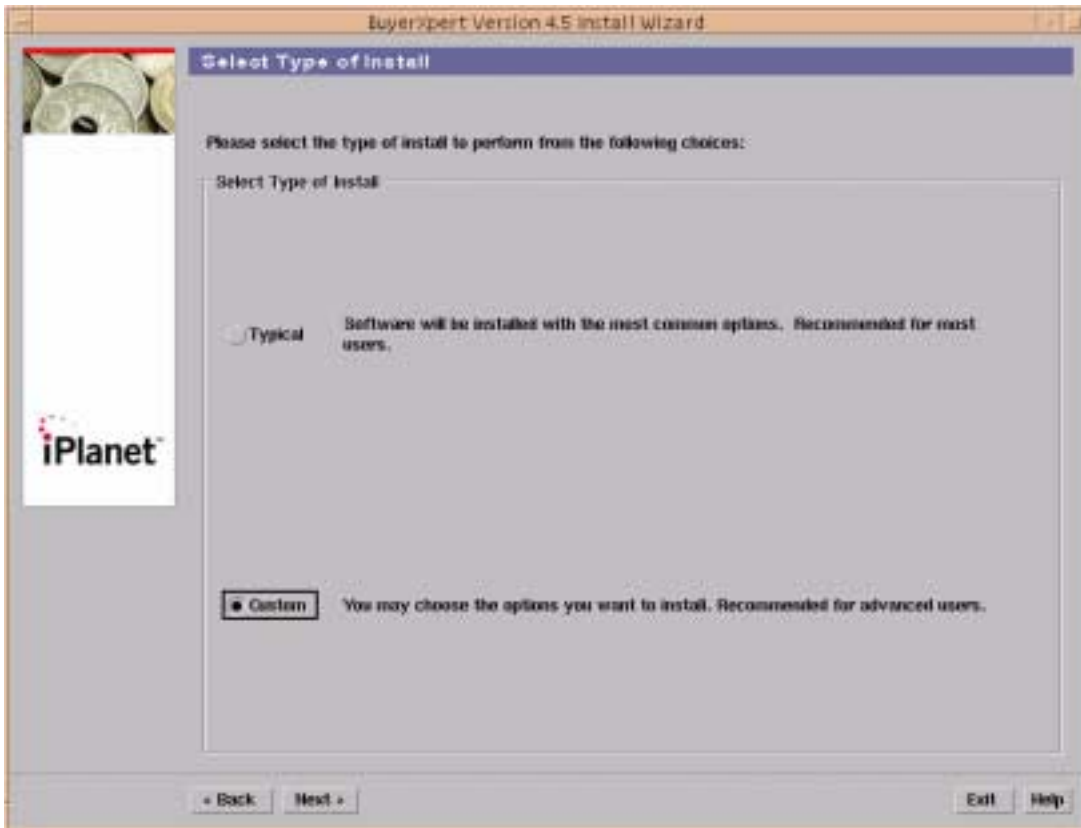


6. If necessary, increase the window size to make the entire agreement visible.
7. Review the agreement.
8. Click the Yes (Accept License) button to accept and continue the installation.
The Select Type of Install screen appears.

Figure 4-3 Select Type of Install screen (with Typical option selected)

9. Select the Typical installation.

Figure 4-4 Select Type of Install screen (with Custom option selected)



10. Or select the Custom installation option that uses default values to create schemas in the Oracle database for OMS, Auctions, RFx, and so forth, and that allows you to specify the Oracle tablespace options.

NOTE

- If you are familiar with the Oracle database, select a Custom installation that provides options to customize the Oracle schema creation to your requirements.

The Custom installation allows you to specify the Oracle tablespace options. These page options appear later in this installation.

11. Click the Next button to continue the installation.
The Installation Directory screen appears.

Figure 4-5 Installation Directory screen



12. Enter the iPlanet Application Server Directory name where you want to install BuyerXpert (for example, `/export/IPM6`). This is typically the directory where the iAS server is located (IASROOT).
Or, select the Browse... button to search for a new location to install BuyerXpert.

13. Click the Next button to continue the installation.

If you enter an existing directory that contains the iPlanet Application Server, the following warning appears after you click the Next button informing you of the existing directory.

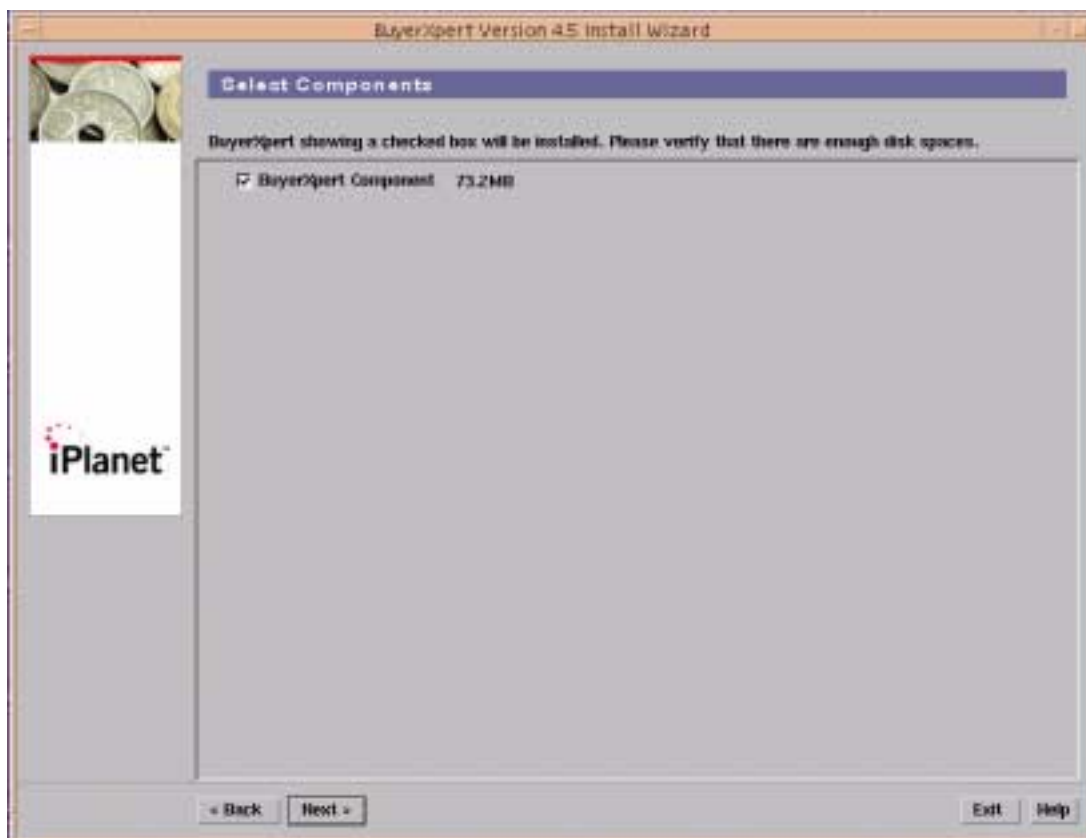
Figure 4-6 Warning screen



14. Review the components list.
15. Click the Accept button to continue the installation.

The installer creates an iPlanet BuyerXpert directory in the specified location and places iPlanet BuyerXpert underneath it.

The Select Components screen displays.

Figure 4-7 Select Components screen

This page displays the size of the BuyerXpert component.

The BuyerXpert software is installed by default.

16. Click the Next button to continue the installation.

NOTE If there is not enough disk space on the system, a warning message displays.

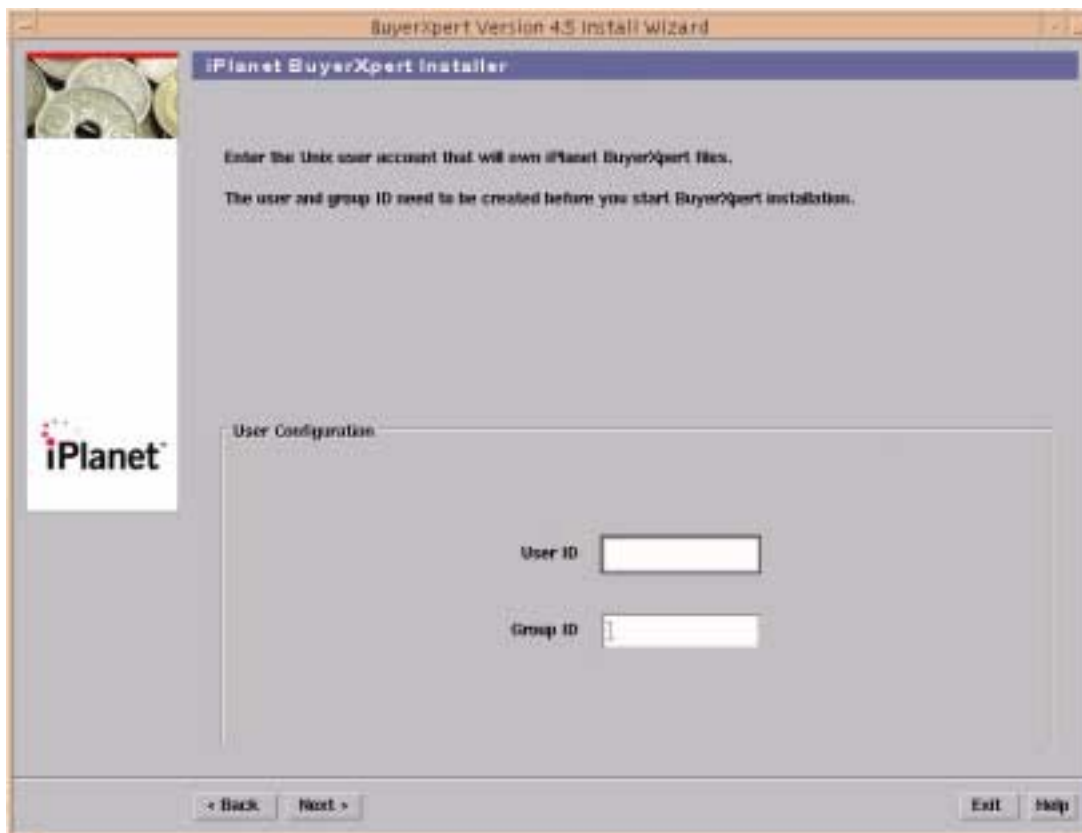
In this case, exit the installation and provide enough disk space before installing the BuyerXpert software.

The Domain Name screen displays.

Figure 4-8 Domain Name screen



17. To find the hostname and domain name, type hostname or domainname at the UNIX prompt.
18. Enter the domain name in the following format:
<hostname>.<domainname>
For example, colonial.red.iplanet.com.
19. Click the Next button to continue the installation.
The User Configuration screen displays.

Figure 4-9 User Configuration screen

20. Enter the User ID.

21. Enter the Group ID.

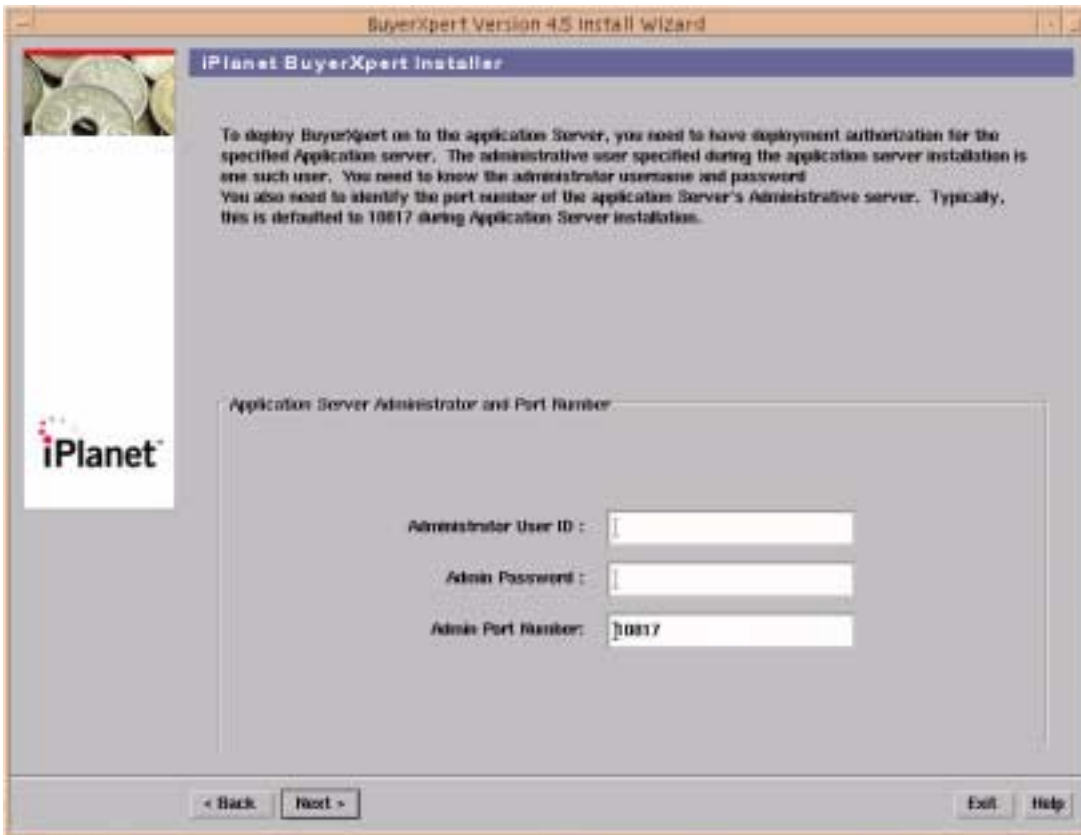
The user and group IDs should be exactly the same as the user and group IDs that you specified during the iAS installation.

You can type `id` at a UNIX prompt to find out your current user and group ID.

22. Click the Next button to continue the installation.

The Application Server Administrator and Port Number screen displays.

Figure 4-10 Application Server Administrator and Port Number screen



23. Enter the Administrator User ID.

This is the same Administrator User ID that you specified during the iAS installation.

24. Enter the Admin Password.

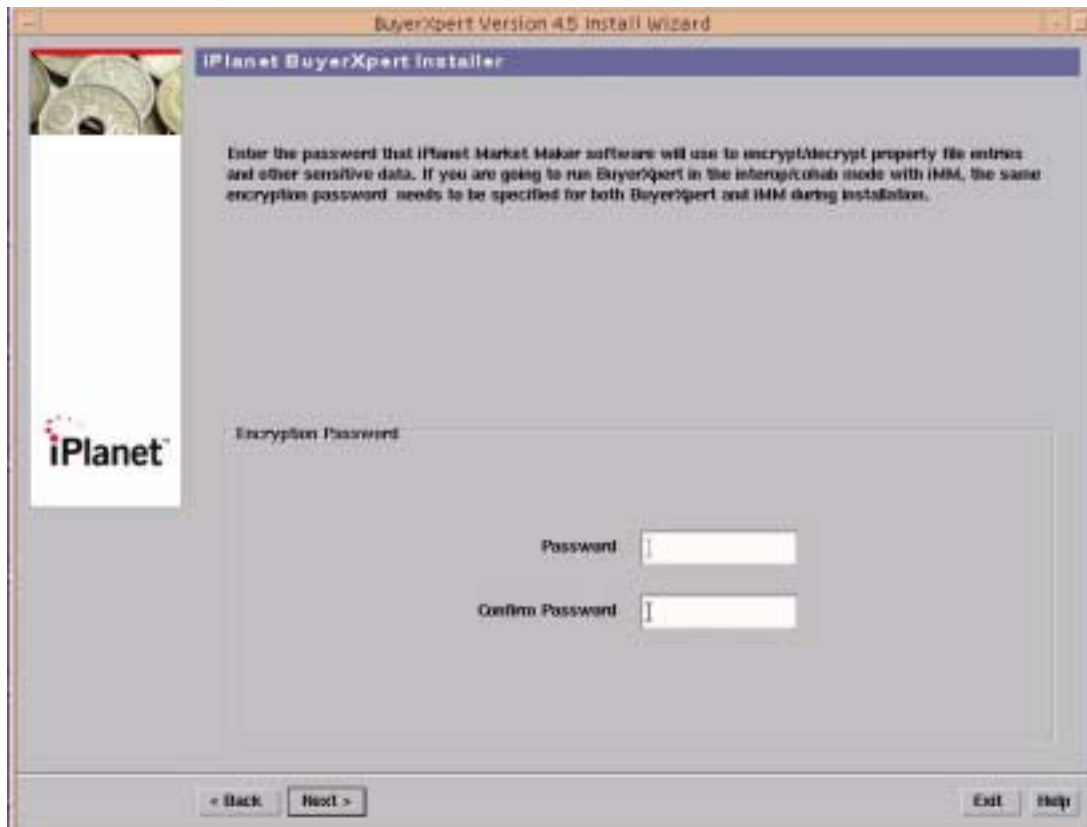
This is the same Admin Password that you specified during the iAS installation.

25. Accept the default for the Admin Port Number.

This is the same Admin Port Number that you specified during the iAS installation.

26. Click the Next button to continue the installation.

The Encryption Password screen appears.



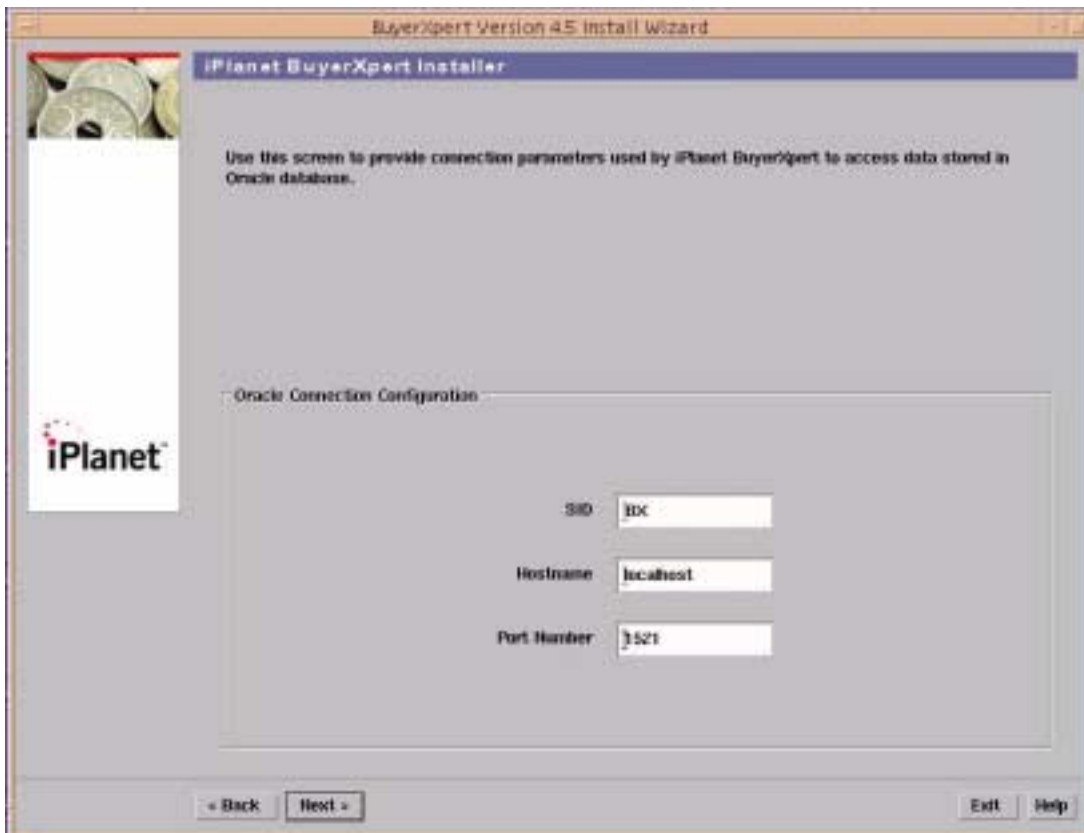
27. Enter the encryption password for encrypt/decrypt property file entries and other sensitive data.

28. Enter the password again to confirm.

29. Click the Next button to continue the installation.

The Oracle Connection Configuration screen displays.

Figure 4-11 Oracle Connection Configuration screen



30. Enter the Oracle SID.

31. Enter the hostname

32. Enter the port number

These values can be found in the `tnsnames.ora` file in the `ORACLE_HOME` directory.

33. Click the Next button to continue the installation.

The JDBC Connect String screen appears.

Figure 4-12 JDBC Connect String screen

The screenshot shows the 'iPlanet BuyerXpert Installer' window. The title bar reads 'BuyerXpert Version 4.5 Install Wizard'. The window contains the following text and fields:

iPlanet BuyerXpert Installer

Since BuyerXpert uses Oracle for one of its data stores, every BuyerXpert installation needs a configuration setting to identify the Oracle data store. BuyerXpert also uses Market Maker as the catalog manager. Aside from the oracle connection that is created for BuyerXpert, another oracle connection is created for the catalog manager

Enter Oracle DB connection information.

JDBC Connect String

Specify Buyer JDBC user:

Specify Buyer JDBC password:

Specify Catalog Mgr DB user:

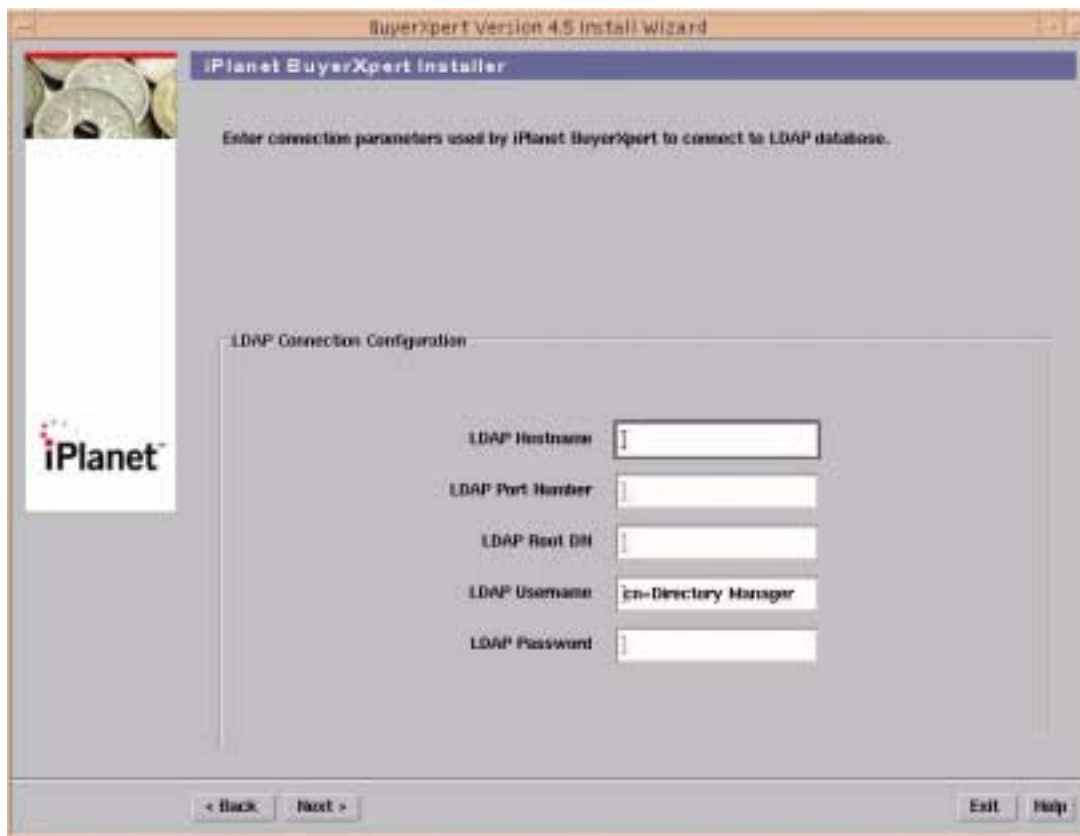
Specify Catalog Mgr DB password:

Navigation buttons: < Back, Next >, Exit, Help

34. Enter the Oracle user to be created for the buyer.
35. Enter the Oracle password to be created for the buyer.
36. Enter the Oracle user to be created for the Catalog Manager DB.
37. Enter the Oracle password to be created for the Catalog Manager DB.
38. Click the Next button to continue the installation.

The LDAP Connection Configuration screen displays.

Figure 4-13 LDAP Connection Configuration screen



39. Enter the LDAP hostname.
40. Enter the LDAP port number
41. Enter the LDAP root DN.
42. Enter the LDAP username.
43. Enter the LDAP password.

These configurations were specified during the creation of the iDS instance.

44. Click the Next button to continue the installation.

The Would you like to set up Archival screen displays.

Figure 4-14 Would you like to set up Archival screen

45. Select Yes if you want to set up PO archival.

NOTE If you choose to install the Requisition Archival feature, it is installed during the BuyerXpert 4.5 installation.

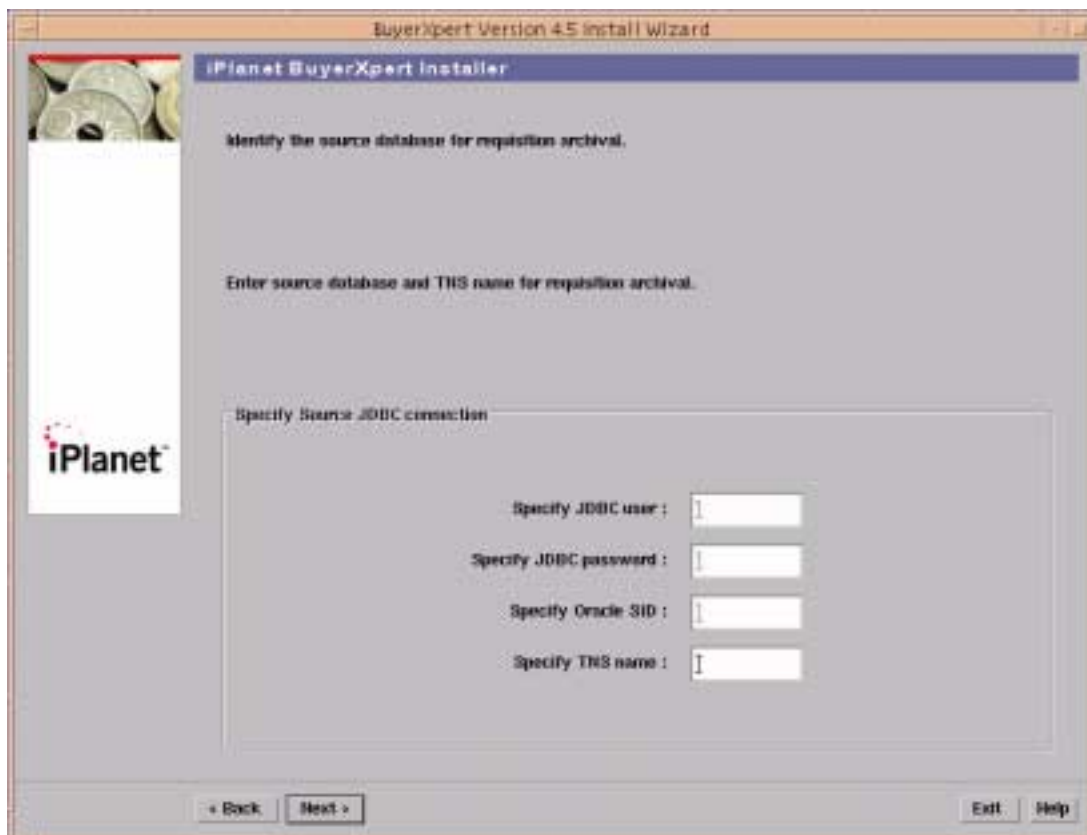
The installer can create the BuyerXpert schema in the target database, if you choose that option.

The target database should also be prepared to be a BuyerXpert database (for example, you should be able to do an `sqlplus` to the SID as a system/manager).

The following seven screens only appear if you select the Yes option to set up for archival.

46. Click the Next button to continue the installation.

The Specify Source JDBC Connection screen displays.

Figure 4-15 Specify Source JDBC Connection screen

The screenshot shows a window titled "BuyerXpert Version 4.5 Install Wizard" with a sub-header "iPlanet BuyerXpert Installer". On the left is a vertical sidebar with an image of coins at the top and the "iPlanet" logo at the bottom. The main area contains the following text and form fields:

Identify the source database for requisition archival.

Enter source database and TNS name for requisition archival.

Specify Source JDBC connection

Specify JDBC user :

Specify JDBC password :

Specify Oracle SID :

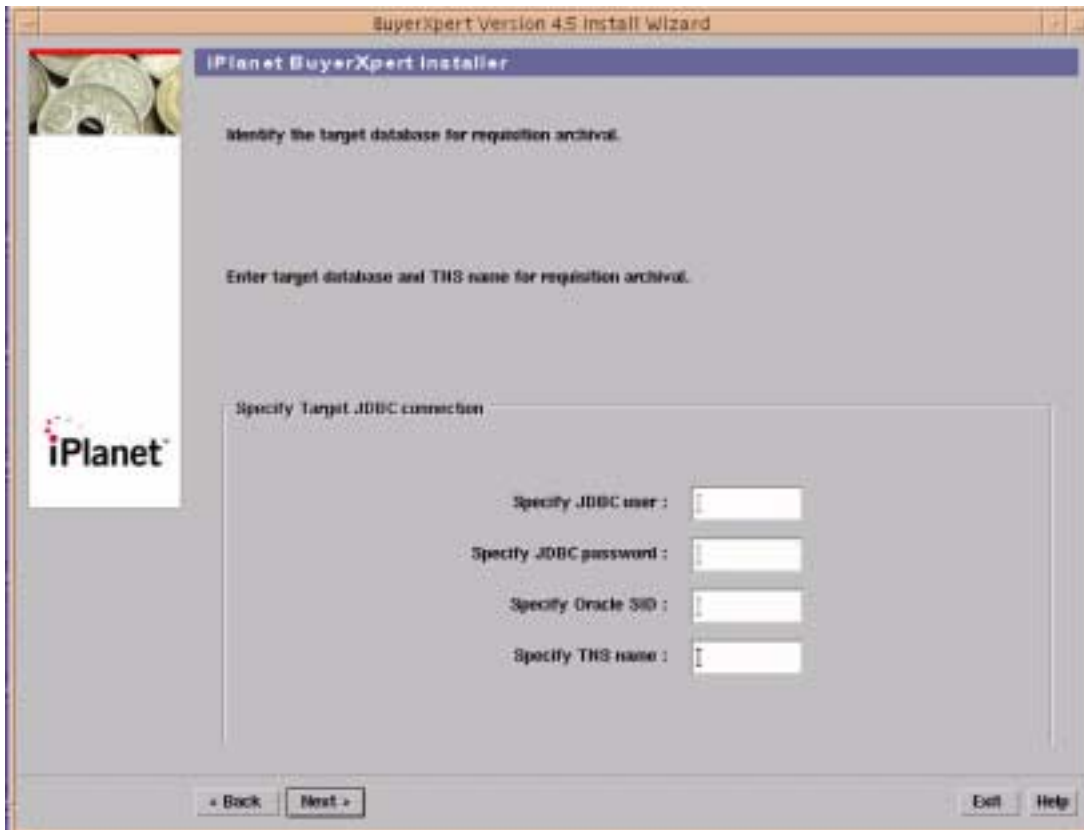
Specify TNS name :

At the bottom, there are four buttons: "< Back", "Next >", "Exit", and "Help".

47. Enter the JDBC user name.
48. Enter the JDBC password.
49. Enter the Oracle SID.
50. Enter the TNS name.
51. Click the Next button to continue the installation.

The Specify Target JDBC Connection screen displays.

Figure 4-16 Specify Target JDBC Connection screen



52. Enter the JDBC user.
53. Enter the JDBC password.
54. Enter the Oracle SID.
55. Enter the TNS name.
56. Click the Next button to continue the installation.

The Specify Driver Name, System User and Password screen displays.

Figure 4-17 Specify Driver Name, System User and Password screen



57. Enter the driver name that is to be used with the XA connection.
58. Enter the Oracle system user.
59. Enter the Oracle system password.

If you have to run `db_setup.sh` before this step, enter the name of the driver that you gave when you ran `db_setup.sh`.

Otherwise, remember the name that you provide here and provide the same name when running `db_setup.sh`.

60. Click the Next button to continue the installation.

The PO Archival Sys User and Password screen displays.

Figure 4-18 PO Archival Sys User and Password screen



61. Enter the Oracle source db sys user name for transaction support.
62. Enter the Oracle source db sys password for transaction support.
63. Enter the target db sys user for transaction support.
64. Enter the target db sys password for transaction support.
65. Click the Next button to continue the installation.

The Oracle PO Archival Objects Configuration screen displays.

Figure 4-19 Oracle PO Archival Objects Configuration screen

BuyerXpert Version 4.5 Install Wizard

iPlanet BuyerXpert Installer

Provide the tablespace parameters used by iPlanet BuyerXpert. to create PO Archival Target module objects in Oracle database.

Oracle PO Archival Objects Configuration

Oracle Target Module User	<input type="text" value="jpx"/>	Password	<input type="text" value="***"/>
Oracle Datafile Directory	<input type="text"/>	File Name	<input type="text" value="target01_IDCLB"/>
Data Tablespace Name	<input type="text" value="target_ts"/>	File Size	<input type="text" value="10M"/>
Oracle Indexfile Directory	<input type="text"/>	File Name	<input type="text" value="target_index01_"/>
Index Tablespace Name	<input type="text" value="target_xts"/>	File Size	<input type="text" value="10M"/>

< Back Next > Exit Help

For a Typical installation:

66. Verify the Oracle target module user.
67. Enter the password.
68. Enter the location of the Oracle datafile directory.
69. Verify the datafile file name.
70. Verify the data tablespace name.
71. Verify the data tablespace file size.
72. Enter the location of the Oracle indexfile directory.
73. Verify the indexfile directory file name.

74. Verify the index tablespace file name.

75. Verify the index tablespace file size.

-
- NOTE**
- For a Custom installation, you can modify the Oracle data and index tablespace name and size, and the location of the datafile.
 - In a Typical or in a Custom installation, if a datafile location is not specified, Oracle uses the default directory location of `ORACLE_HOME/dbs`.
-

76. Click the Next button to continue the installation.

The Target Schema screen displays.

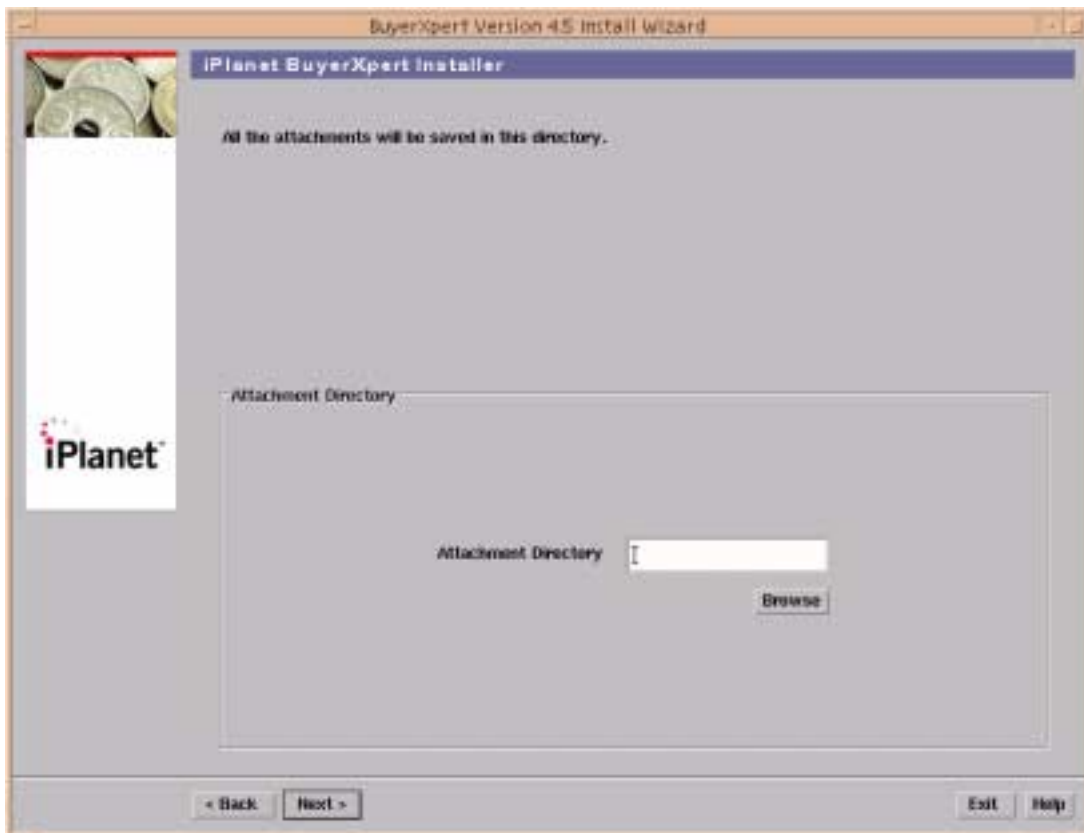
Figure 4-20 Target Schema screen

77. Select Yes if you want to create schema data on the target database.

NOTE If you select Yes, by creating schema data, the activated requisition is overwritten.

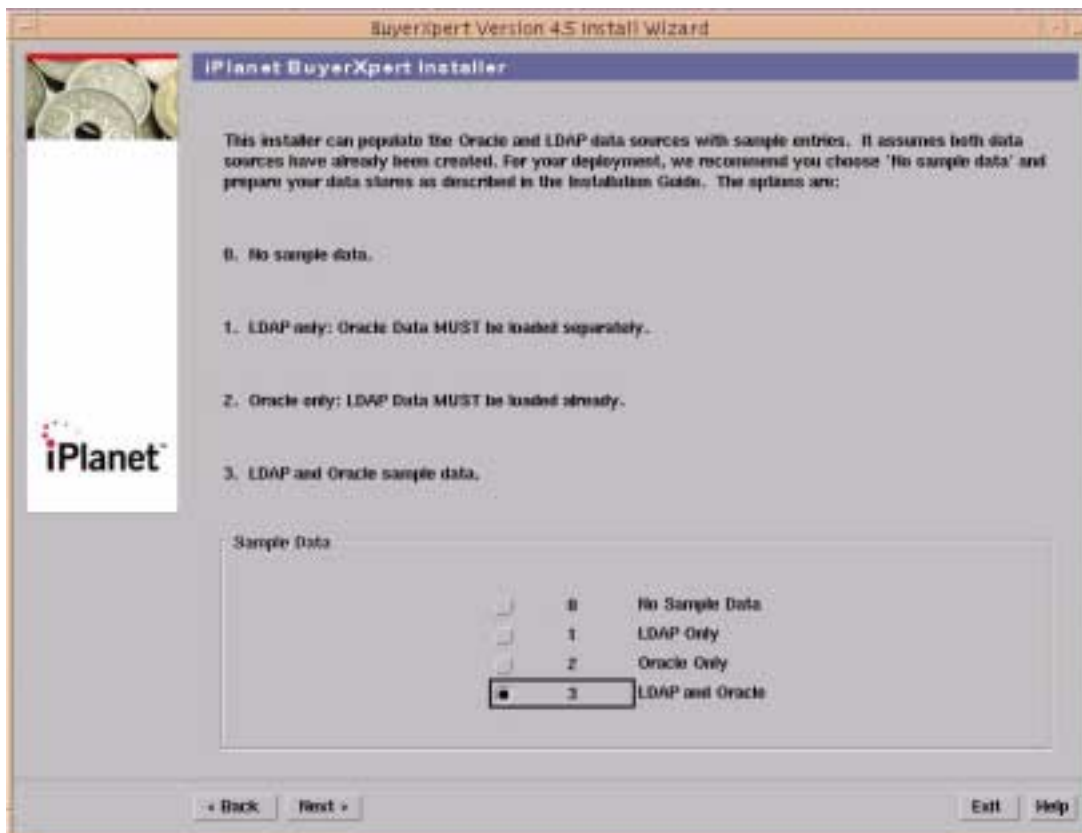
78. Click the Next button to continue the installation.
The Attachment Directory screen displays.

Figure 4-21 Attachment Directory screen



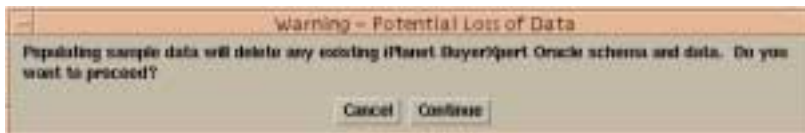
79. Enter the location of the attachment directory.
80. Click the Next button to continue the installation.
The Sample Data screen displays.

Figure 4-22 Sample Data screen



81. Select No if you do not want to populate the Oracle and LDAP data sources with sample entries.
82. Or, Select one of the following:
 - o LDAP Only (to populate the LDAP sample data only)
 - o Oracle Only (to populate the Oracle sample data only)
 - o LDAP and Oracle (to populate both the LDAP and the Oracle sample data)
83. Click the Next button to continue the installation.
 - o If you select either No Sample Data (option #0) or LDAP Only (option #1), proceed to the Actuate Report Server screen.

- If you select either Oracle Only (option #2) or LDAP and Oracle (option #3), the following 13 screens display.
- If you select either Oracle Only (option #2) or LDAP Only (option #3), a warning message displays.

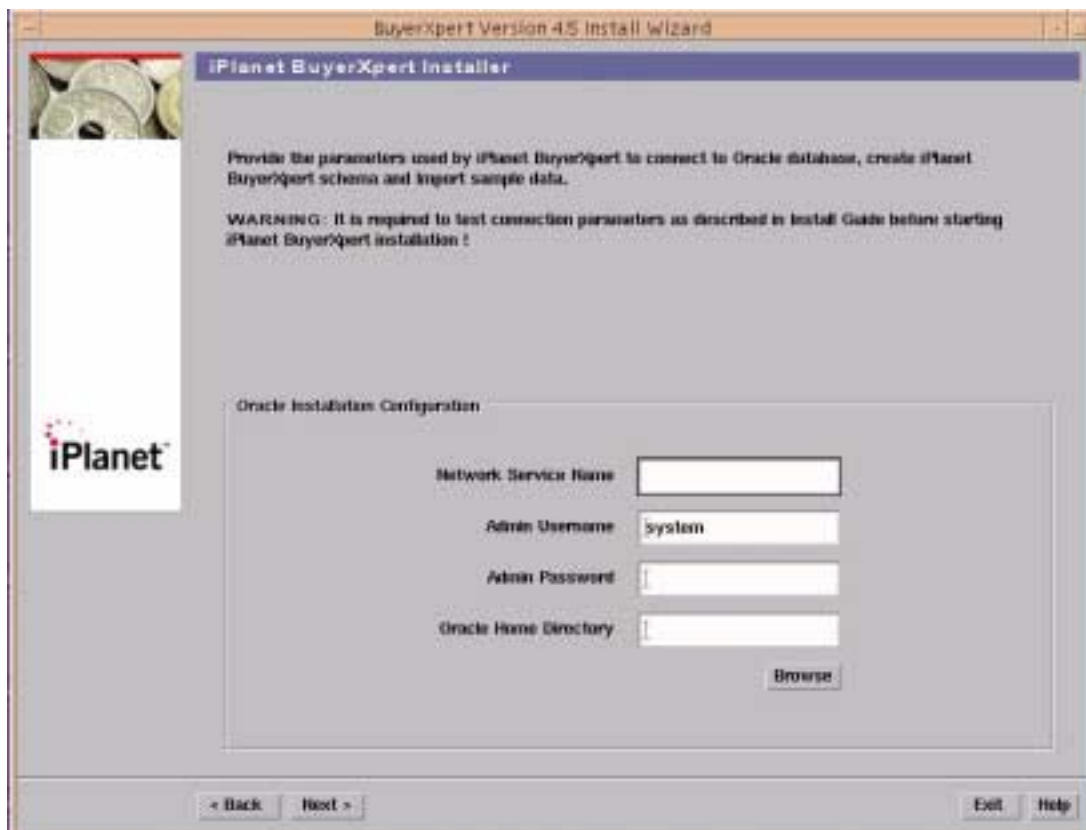


The message advises that *populating sample data will delete any existing iPlanet BuyerXpert Oracle schema and data*, and you are prompted to choose whether or not you would like to proceed.

The installer recreates the users and tablespaces that you specified earlier, and that you specify in the next 12 screens.

- 84.** Click Continue to continue with the installation.

The Oracle Installation Configuration screen displays.

Figure 4-23 Oracle Installation Configuration screen

85. Enter the network service name.
86. Enter the system username.
87. Enter the system password.
88. Enter the location of the Oracle home directory.
89. Click the Next button to continue the installation.

The Oracle Buyer Objects Configuration screen displays.

Figure 4-24 Oracle Buyer Objects Configuration screen

BuyerXpert Version 4.5 Install Wizard

iPlanet BuyerXpert Installer

Provide the tablespace parameters used by iPlanet BuyerXpert to create buyer module objects in Oracle database.

Oracle Buyer Objects Configuration

Oracle Module User	<input type="text"/>	Password	<input type="text"/>
Oracle Datafile Directory	<input type="text"/>	File Name	buyer01_004.db
Data Tablespace Name	buyer_ts	File Size	10M
Oracle Indexfile Directory	<input type="text"/>	File Name	buyer_index01_1
Index Tablespace Name	buyer_ixts	File Size	10M

← Back Next → Exit Help

90. For a Custom installation:

You can modify the Oracle user, data and index tablespace name and size, and the location of the datafile.

If no datafile location is specified, Oracle uses the default location, ORACLE_HOME/dbs.

- 91.** Enter the Oracle module username.
- 92.** Enter the location of the Oracle datafile directory.
- 93.** Enter the location of the Oracle indexfile directory.
- 94.** Enter the password.

95. Click the Next button to continue the installation.

The Oracle Common Objects Configuration screen displays.

Figure 4-25 Oracle Common Objects Configuration screen

BuyerXpert Version 4.5 Install Wizard

iPlanet BuyerXpert Installer

Provide the parameters used by iPlanet Catalog Manager to create common module objects in Oracle database.

Oracle Common Objects Configuration

Oracle Module User	<input type="text" value="cmn"/>	Password	<input type="password"/>
Oracle Datafile Directory	<input type="text"/>	File Name	<input type="text" value="cmn01_EDC.dbf"/>
Data Tablespace Name	<input type="text" value="cmn_ts"/>	File Size	<input type="text" value="10M"/>
Oracle Indexfile Directory	<input type="text"/>	File Name	<input type="text" value="cmn_index01_EC"/>
Index Tablespace Name	<input type="text" value="cmn_ixs"/>	File Size	<input type="text" value="10M"/>

< Back Next > Exit Help

96. For a Custom installation:

- o Enter the password for the cmn user.
- o You can modify the Oracle user, data and index tablespace name and size, and the location of the datafile.

If no datafile location is specified, Oracle uses the default location, ORACLE_HOME/dbs.

97. Click the Next button to continue the installation.

The Oracle Community Objects Configuration screen displays.

Figure 4-26 Oracle Community Objects Configuration screen

BuyerXpert Version 4.5 Install Wizard

iPlanet BuyerXpert Installer

Provide the parameters used by iPlanet Catalog Manager to create community module objects in Oracle database.

Oracle Community Objects Configuration

Oracle Module User	<input type="text" value="com"/>	Password	<input type="text"/>
Oracle Datafile Directory	<input type="text"/>	File Name	<input type="text" value="com01_0X.dbf"/>
Data Tablespace Name	<input type="text" value="com_ts"/>	File Size	<input type="text" value="10M"/>
Oracle Indexfile Directory	<input type="text"/>	File Name	<input type="text" value="com_index01_0E"/>
Index Tablespace Name	<input type="text" value="com_xts"/>	File Size	<input type="text" value="10M"/>

< Back Next > Exit Help

98. For a Custom installation:

- o Enter the password for the `com` user.
- o You can modify the Oracle user, data and index tablespace name and size, and the location of the datafile.

If no datafile location is specified, Oracle uses the default location, `ORACLE_HOME/dbs`.

99. Click the Next button to continue the installation.

The Oracle Catalog Objects Configuration screen displays.

Figure 4-27 Oracle Catalog Objects Configuration screen

BuyerXpert Version 4.5 Install Wizard

iPlanet BuyerXpert Installer

Provide the parameters used by iPlanet Catalog Manager to create catalog module objects in Oracle database.

Oracle Catalog Objects Configuration

Oracle Module User	<input type="text" value="cat"/>	Password	<input type="text"/>
Oracle Datafile Directory	<input type="text"/>	File Name	<input type="text" value="cat01_001.dbf"/>
Data Tablespace Name	<input type="text" value="cat_ts"/>	File Size	<input type="text" value="30M"/>
Oracle Indexfile Directory	<input type="text"/>	File Name	<input type="text" value="cat_index01_001"/>
Index Tablespace Name	<input type="text" value="cat_ixts"/>	File Size	<input type="text" value="30M"/>

< Back Next > Exit Help

100. For a Custom installation:

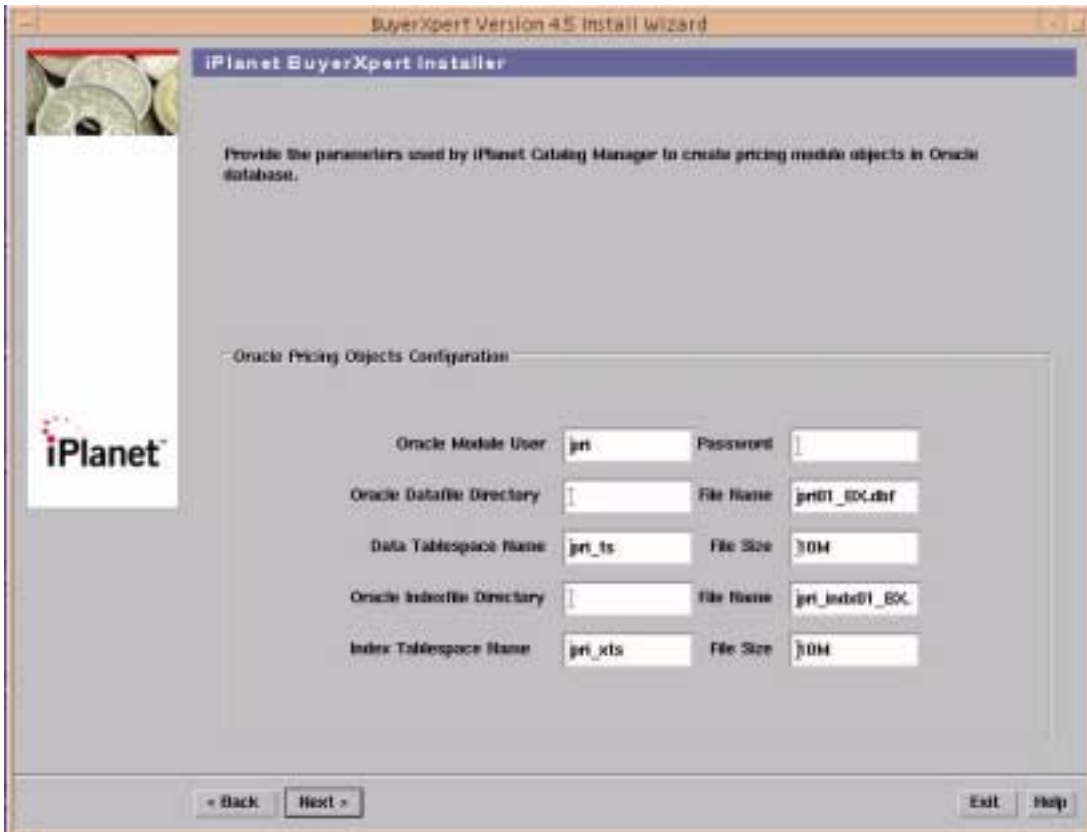
- o Enter the password for the `cat` user.
- o You can modify the Oracle user, data and index tablespace name and size, and the location of the datafile.

If no datafile location is specified, Oracle uses the default location, `ORACLE_HOME/dbs`.

101. Click the Next button to continue the installation.

The Oracle Pricing Objects Configuration screen displays.

Figure 4-28 Oracle Pricing Objects Configuration screen



102. Click the Next button to continue the installation.

The Oracle ESV Objects Configuration screen displays.

Figure 4-29 Oracle ESV Objects Configuration screen

BuyerXpert Version 4.5 Install Wizard

iPlanet BuyerXpert Installer

Provide the parameters used by iPlanet Market Maker to create ESV module objects in Oracle database.

Oracle ESV Objects Configuration

Oracle Module User	esv	Password	
Oracle Datafile Directory		File Name	esv01_IDX.dbf
Data Tablespace Name	esv_ts	File Size	30M
Oracle Indexfile Directory		File Name	esv_idx01_00
Index Tablespace Name	esv_xts	File Size	30M

< Back Next > Exit Help

103.For a Custom installation:

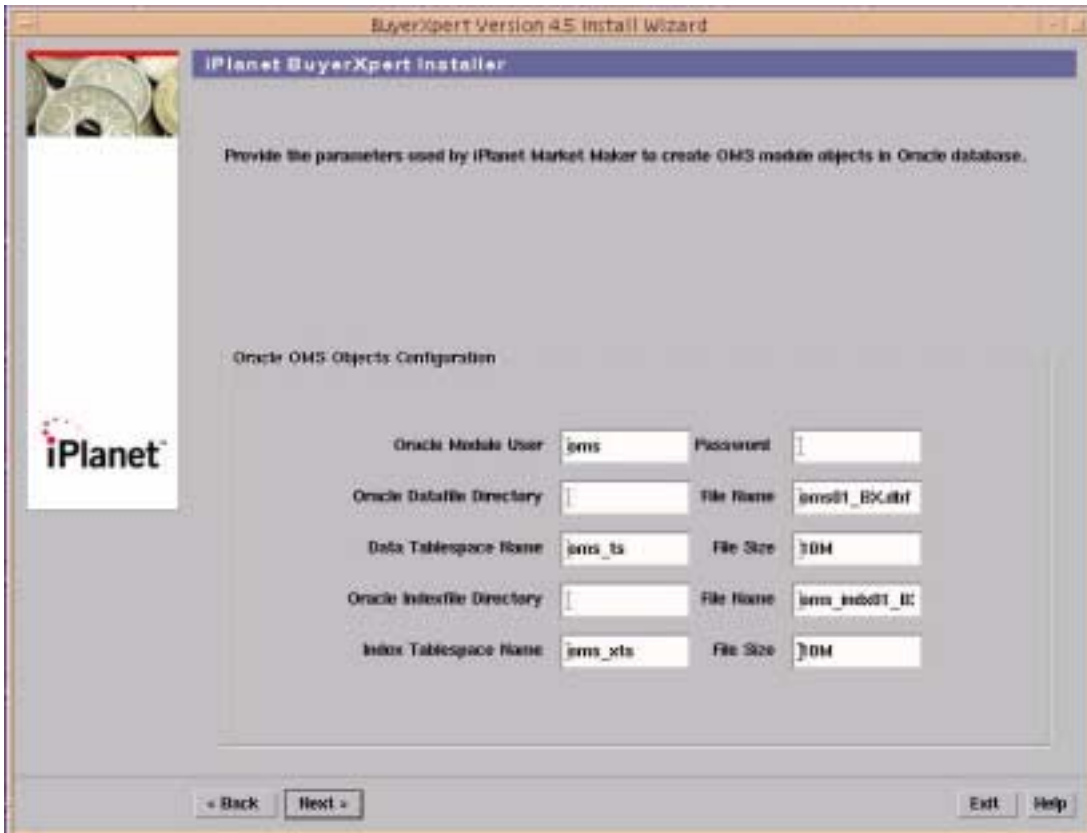
- Enter the password for the `esv` user.
- You can modify the Oracle user, data and index tablespace name and size, and the location of the datafile.

If no datafile location is specified, Oracle uses the default location, `ORACLE_HOME/dbs`.

104.Click the Next button to continue the installation.

The Oracle OMS Objects Configuration screen displays.

Figure 4-30 Oracle OMS Objects Configuration screen



105.For a Custom installation:

- Enter the password for the oms user.
- You can modify the Oracle user, data and index tablespace name and size, and the location of the datafile.

If no datafile location is specified, Oracle uses the default location, ORACLE_HOME/dbf.

106.Click the Next button to continue the installation.

The Oracle Auction Objects Configuration screen displays.

Figure 4-31 Oracle Auction Objects Configuration screen

BuyerXpert Version 4.5 Install Wizard

iPlanet BuyerXpert Installer

Provide the parameters used by iPlanet Catalog Manager to create auction module objects in Oracle database.

Oracle Auction Objects Configuration

Oracle Module User	<input type="text" value="auc"/>	Password	<input type="text"/>
Oracle Datafile Directory	<input type="text"/>	File Name	<input type="text" value="auc01_BK.dbf"/>
Data Tablespace Name	<input type="text" value="auc_ts"/>	File Size	<input type="text" value="10M"/>
Oracle Indexfile Directory	<input type="text"/>	File Name	<input type="text" value="auc_indx01_idx"/>
Index Tablespace Name	<input type="text" value="auc_ixts"/>	File Size	<input type="text" value="10M"/>

< Back Next > Exit Help

107.For a Custom installation:

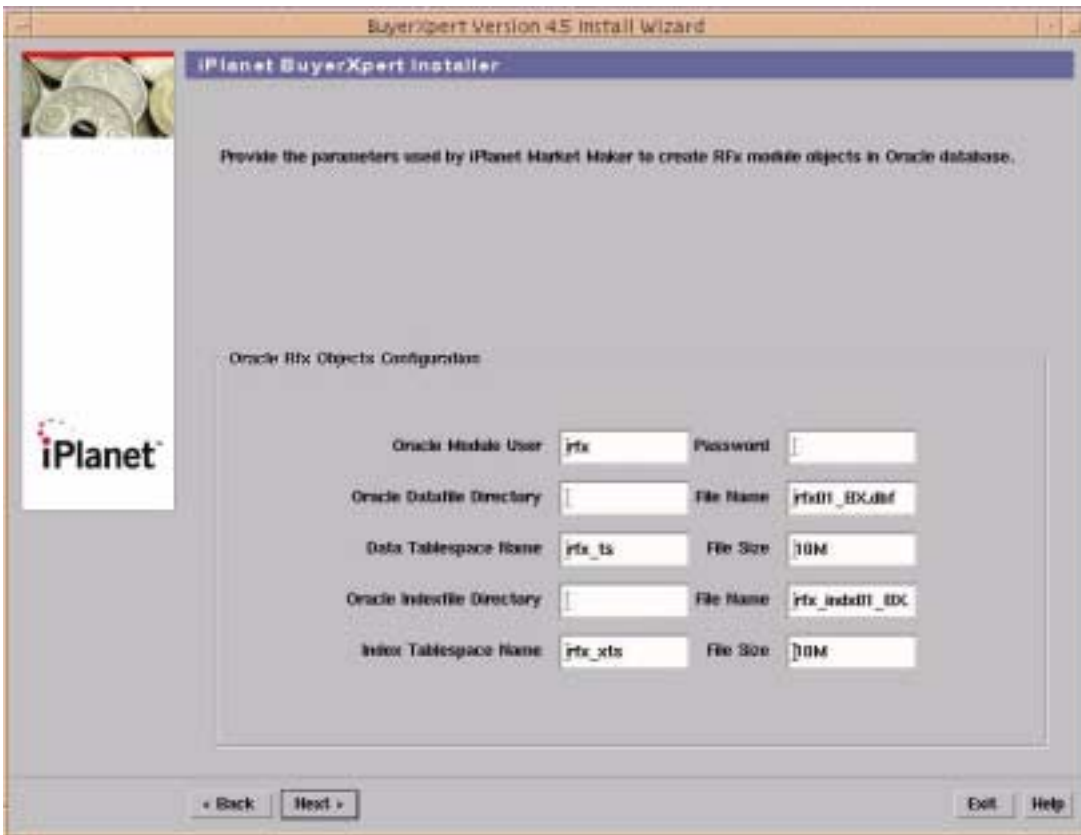
- o Enter the password for the auc user.
- o You can modify the Oracle user, data and index tablespace name and size, and the location of the datafile.

If no datafile location is specified, Oracle uses the default location, ORACLE_HOME/dbf.

108.Click the Next button to continue the installation.

The Oracle RFX Objects Configuration screen displays.

Figure 4-32 Oracle RFX Objects Configuration screen



109.For a Custom installation:

- Enter the password for the `rfx` user.
- You can modify the Oracle user, data and index tablespace name and size, and the location of the datafile.

If no datafile location is specified, Oracle uses the default location, `ORACLE_HOME/dbs`.

110.Click the Next button to continue the installation.

The Oracle Exchange Objects Configuration screen displays

Figure 4-33 Oracle Exchange Objects Configuration screen

BuyerXpert Version 4.5 Install Wizard

iPlanet BuyerXpert Installer

Provide the parameters used by iPlanet Market Maker to create exchange module objects in Oracle database.

Oracle Exchange Objects Configuration

Oracle Module User	<input type="text" value="exc"/>	Password	<input type="text"/>
Oracle Datafile Directory	<input type="text"/>	File Name	<input type="text" value="exc01_exc.dbf"/>
Data Tablespace Name	<input type="text" value="exc_ts"/>	File Size	<input type="text" value="10M"/>
Oracle Indexfile Directory	<input type="text"/>	File Name	<input type="text" value="exc_index01_idx"/>
Index Tablespace Name	<input type="text" value="exc_ixts"/>	File Size	<input type="text" value="10M"/>

< Back Next > Exit Help

111. For a Custom installation:

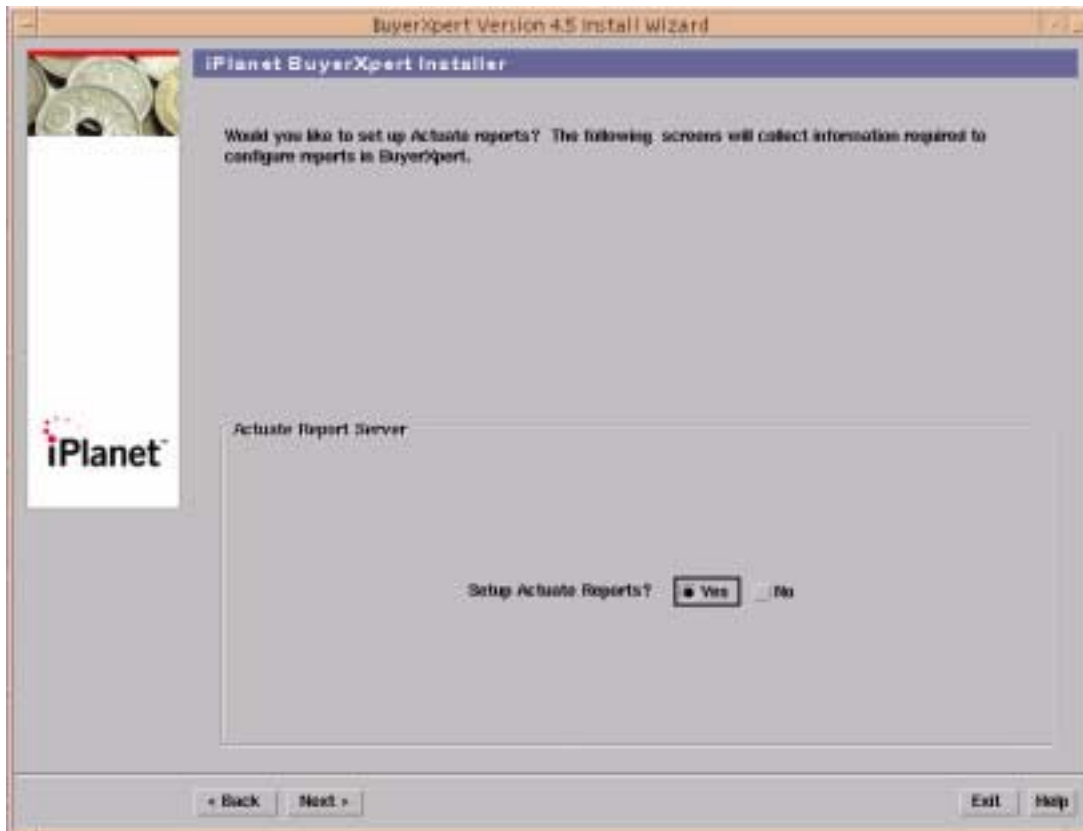
- Enter the password for the exc user.
- You can modify the Oracle user, data and index tablespace name and size, and the location of the datafile.

If no datafile location is specified, Oracle uses the default location, ORACLE_HOME/dbs.

112. Click the Next button to continue the installation.

The Actuate Report Server screen displays.

Figure 4-34 Actuate Report Server screen

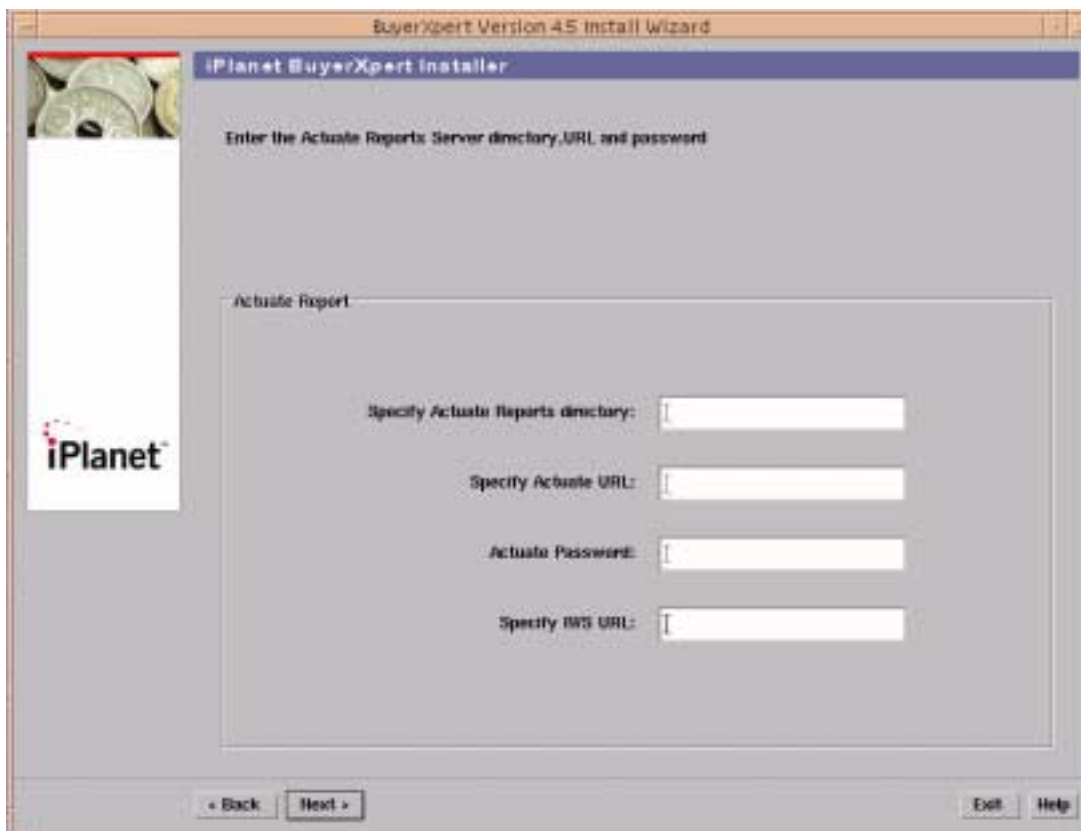


113. If you do not want to setup Actuate reports, proceed to Ready to Install, Click the Next button to continue the installation..

114. Select Yes if you want to setup Actuate reports.

115. Click the Next button to continue the installation.

The Actuate Report screen displays.

Figure 4-35 Actuate Report screen

The screenshot shows a window titled "BuyerXpert Version 4.5 Install Wizard" with a sub-header "iPlanet BuyerXpert Installer". The main text reads "Enter the Actuate Reports Server directory, URL, and password". Below this, a section titled "Actuate Report" contains four input fields: "Specify Actuate Reports directory:", "Specify Actuate URL:", "Actuate Password:", and "Specify iWS URL:". The iPlanet logo is visible on the left side of the window. At the bottom, there are buttons for "< Back", "Next >", "Exit", and "Help".

116. Enter the location of the Actuate Reports directory.

117. Enter the Actuate URL.

118. Enter the Actuate password.

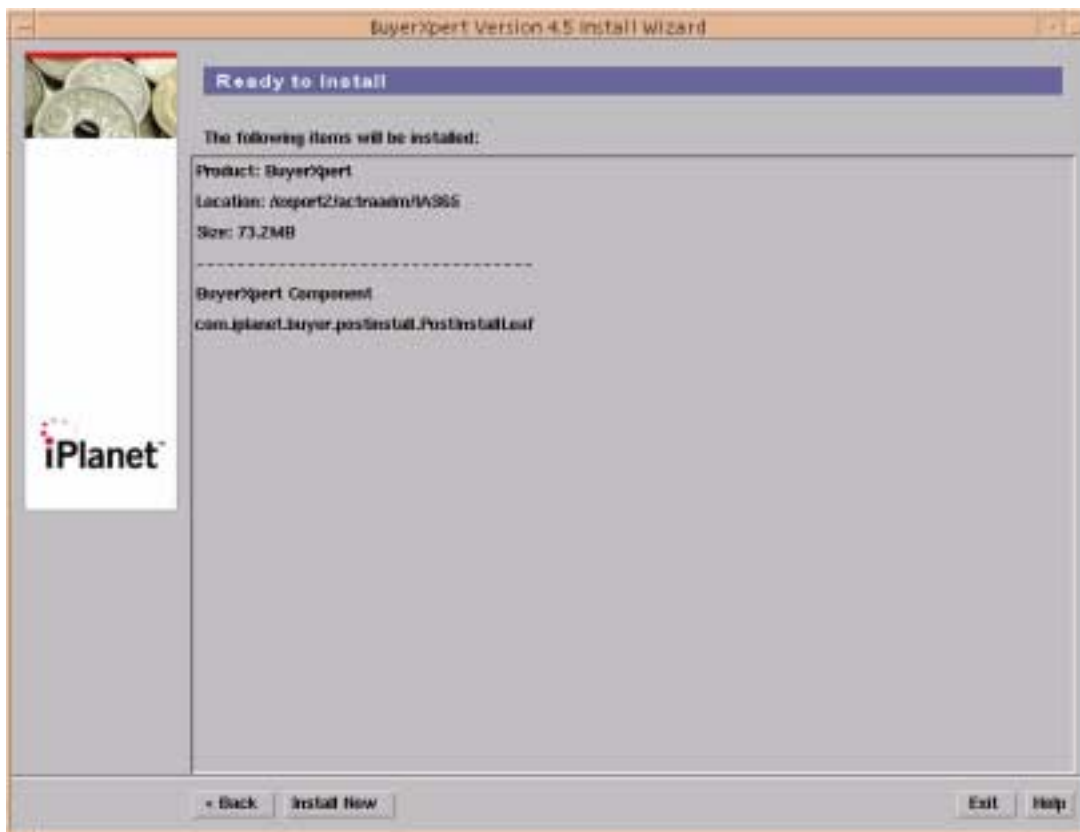
NOTE The Actuate Reports directory, URL, and password were specified during the Actuate Reports installation.

119. Enter the iWS URL.

120. Click the Next button to continue the installation.

The Ready to Install screen displays.

Figure 4-36 Ready to Install screen



121. Click Install Now.

The Installing... screen displays.

Figure 4-37 Installing... screen

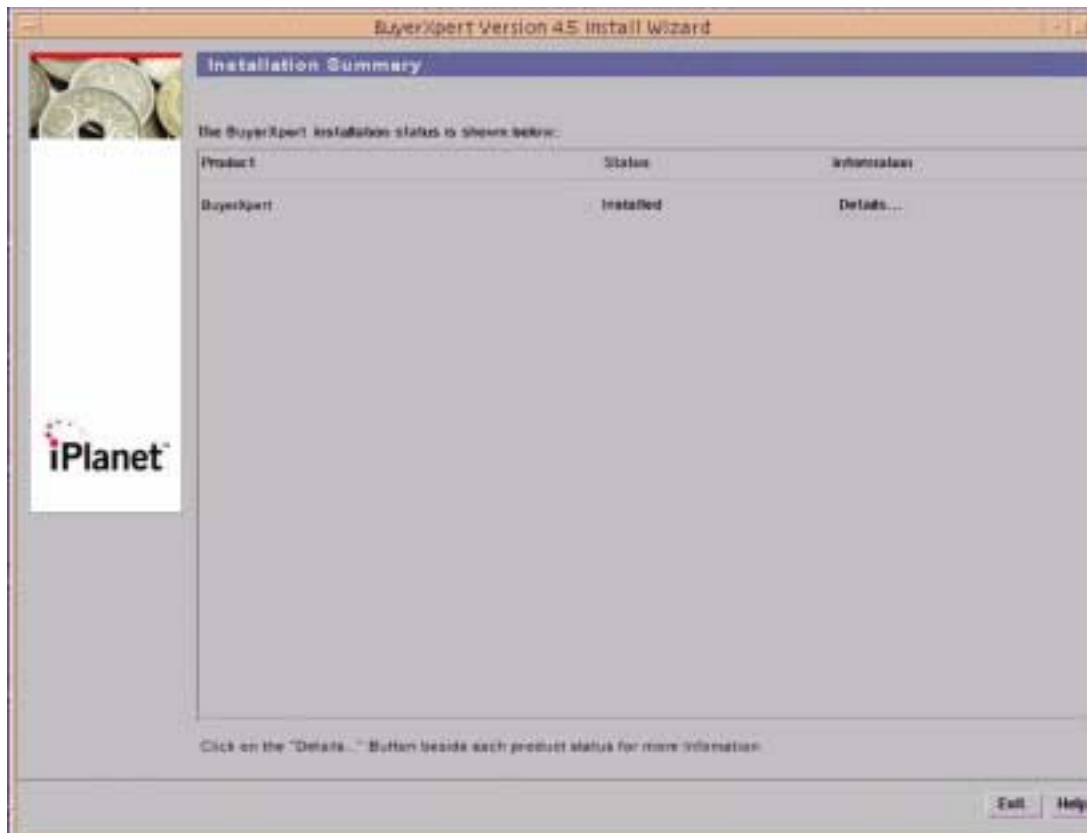
Installation is in progress.

NOTE The Installation Progress bar displays 100% before installation is complete (this is a known problem).

Click Stop if you want to cancel the installation before it is complete.

The Installation Summary screen displays.

Figure 4-38 Installation Summary screen



The installation is complete in approximately 45 minutes.

If the installation is successful, the Status displays *Installed*.

If the installation is not successful, the Status displays *Failed*.

The installation log is in `/tmp/BX45install-<username>`.

Click Exit to exit the installer.

Post Installation Configuration for Requisition Archival/Restore

The following configurations need to be done after the BuyerXpert 4.5 installation for Archival/Restore.

PM Related Configuration for Archival/Restore

This step needs to be done only after you have configured Process Manager for BuyerXpert 4.5 Installation. This step creates workflow related tables in the target database.

```
cd <IASROOT>/buyer/admin/config/archive
./archive_pm.sh
    -p <PM_USER_CONN_STRING_FOR_SOURCE>
    -s <SYSTEM_USER_CONN_STRING_FOR_TARGET>
    -t <DATA_SEGMENT_FOR_TARGET>
    -i <INDEX_SEGMENT_FOR_TARGET>
    -c creates PM Schema on Target
```

For example, `./archive_pm.sh -p procmgr/procmgr@BX -t system/manager@TARGET -t TS01 -i TS02 -c`

Configuring Actuate for BuyerXpert

1. The Setup Actuate Reports screen displays.
Enter **n** if you do not want to configure Actuate with BuyerXpert at this time.
2. Enter **y** if you want to configure Actuate with BuyerXpert at this time.

NOTE Actuate must be installed prior to installing BuyerXpert.

If you entered **y** in the previous screen, the Report Server screen displays.

3. Enter the path where Actuate is installed.
4. At the next screen, enter the Actuate Server URL.

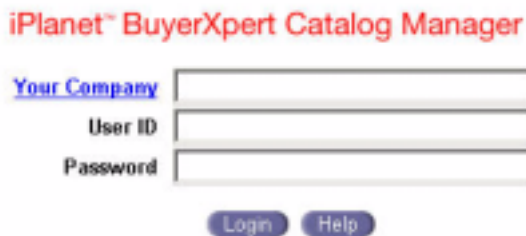
5. The Actuate Administrator Password screen displays.
Enter the Actuate administrator password.
Allow approximately 30 minutes for BuyerXpert to complete the installation.

Creating Catalogs in Catalog Manager

To create catalogs in Catalog Manager:

1. Enter the URL:
`http://hostname:port/NASApp/buyer/imm/imm.jsp`
2. The Login screen displays.

Figure 4-39 Login screen



iPlanet™ BuyerXpert Catalog Manager

Your Company

User ID

Password

Login Help

3. To enter the sample catalog data, enter the following information:
 - o Company ID: `buyercompany`
 - o Username: `kevin`
 - o Password: `kevin`

If the company is a buyer and a seller company, the Buyer/Seller login screen displays.

Figure 4-40 Buyer/Seller Login screen



iPlanet™ BuyerXpert Catalog Manager

Welcome kevin! Please select a role:

Seller Buyer

4. Select one of the following roles:

- Seller
- Buyer

The Catalog : Select a Catalog screen displays.

Figure 4-41 Catalog : Select a Catalog screen



5. Click Catalog from the menu bar.

The Browse option displays in the submenu.

Figure 4-42 Browse Option (sub-menu option)



6. Click Browse.

The Catalog : Select a Catalog screen displays with a list of existing catalogs.

Figure 4-43 Catalog : Select a Catalog screen



7. Click a Catalog Name.
The Catalog : Browse Catalog page appears.
8. If necessary, click the Return to Catalogs button.
The Catalog : Select a Catalog page appears.
9. Click the Create button.
The Catalog : Create Catalog page appears.
10. Enter a catalog name.
11. Click Next.
12. Enter a brief Catalog Description to provide notes that describe the catalog contents.
13. Select a company.
Select catalog categories for this catalog view.
14. Select a user group for accessing this catalog.
Verify the configuration.
15. Confirm
Bring up this catalog to online mode from offline.

Creating Membership Indexes

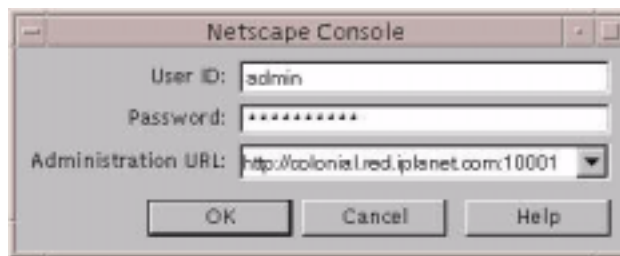
For membership performance improvements, you need to create the following indexes in your membership Directory Server if they do not already exist:

```
iplanetecguild
iplanetecparentorgguid
uid
sn
cn
ou
o
displayname
```

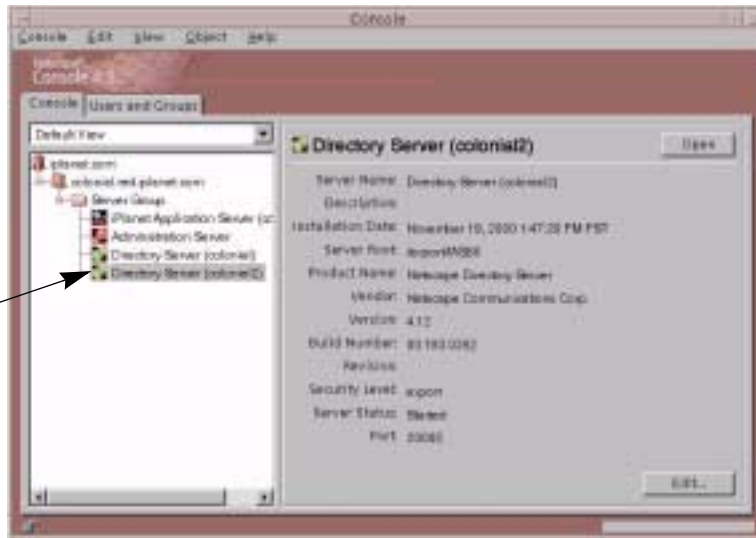
1. To create indexes, you need to run `startconsole` from the iAS home directory.

```
% ./startconsole
```

2. The console screen displays.

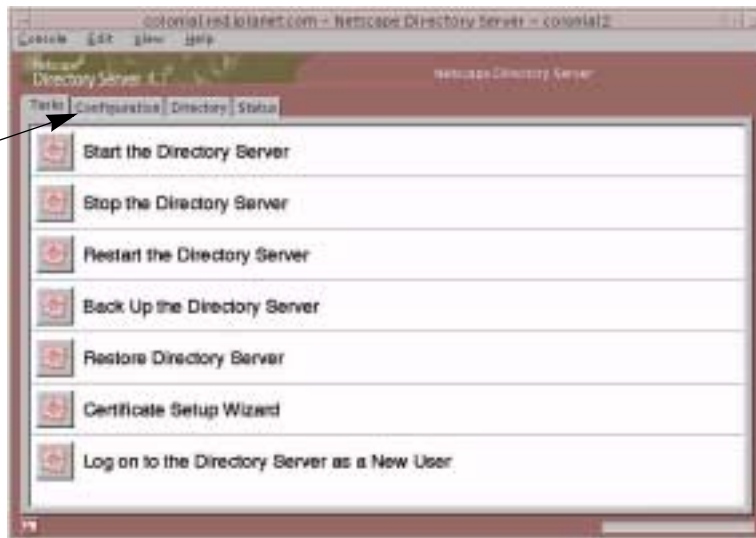


3. Enter the administrator password you gave when you installed Process Manager.
4. Click OK.
5. Double click the Directory Server that you created under the Server Group.



Directory Server

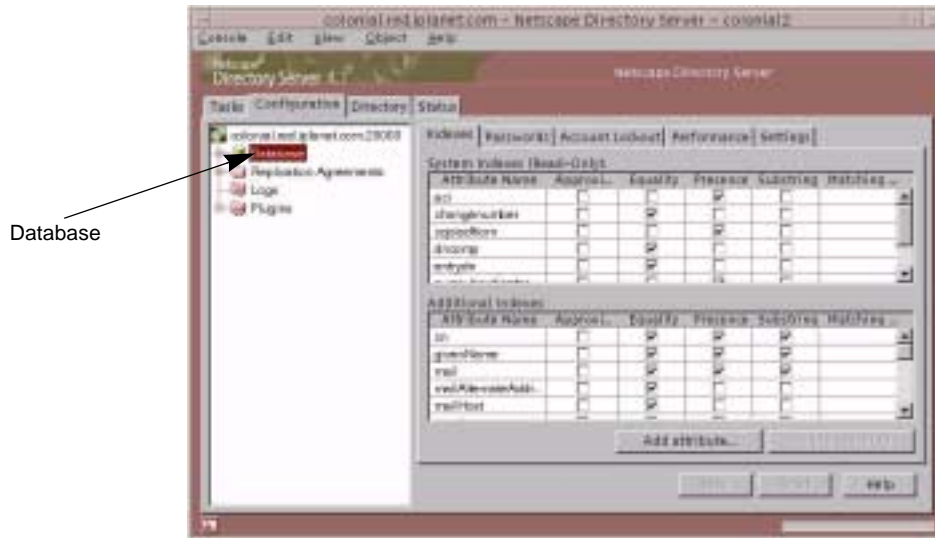
6. Select the Configuration tab.



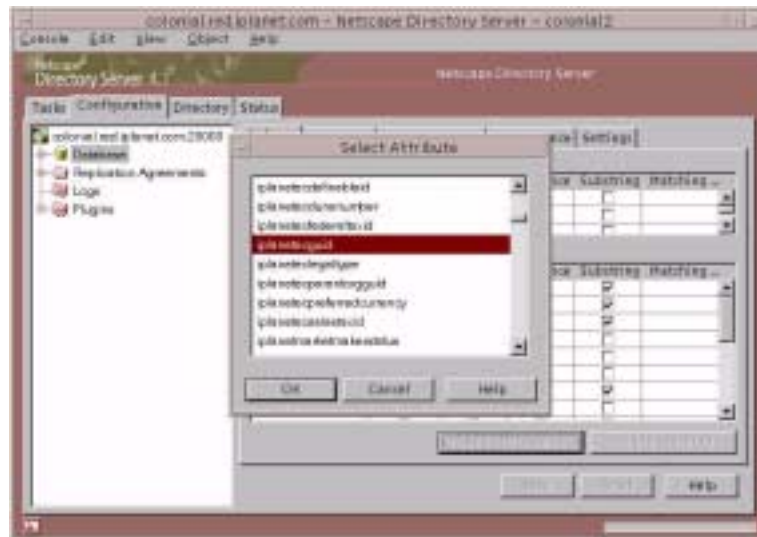
Configuration

7. Highlight Database, located on the left side.

8. Click Add Attribute.



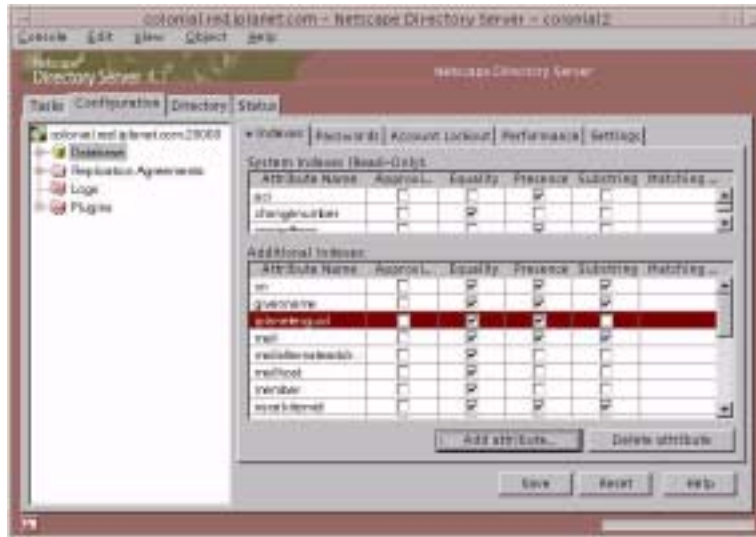
The Select Attribute window displays.



9. Select iplanetecguid.

10. Click OK.

The attribute name iplanetecguid appears under the Addition Indexes column and attribute Equality and Presence is checked.



11. Add the other attributes by repeating the previous steps.

12. Click Add Attribute to add all these attributes:

iplanetecparentorgguid

uid

sn

cn

ou

o

displayname

13. Click Save.

14. Restart the server.

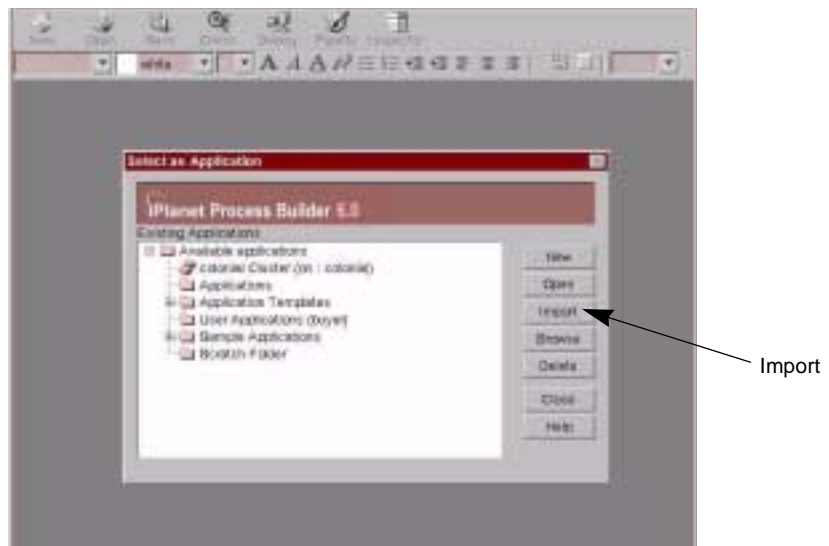
Running the Process Builder

To deploy a sample application:

1. Run the Process Builder:

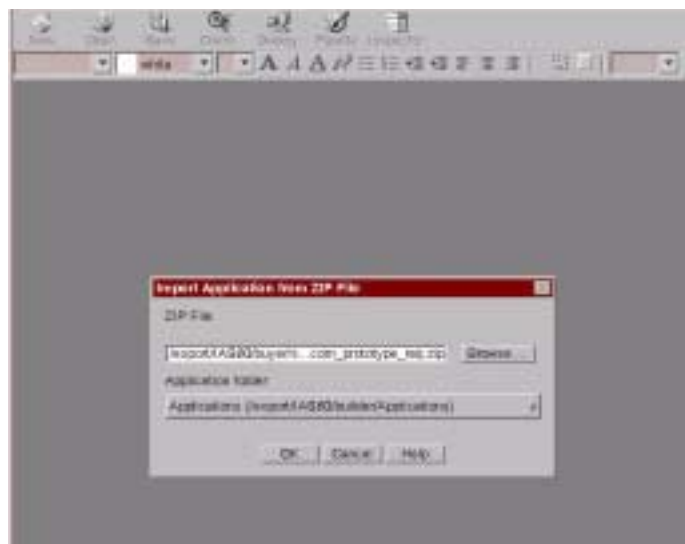
```
% IAS_ROOT/builder/Builder.sh &
```

The Process Builder screen displays.



2. Click Import.

The Import Application window displays.

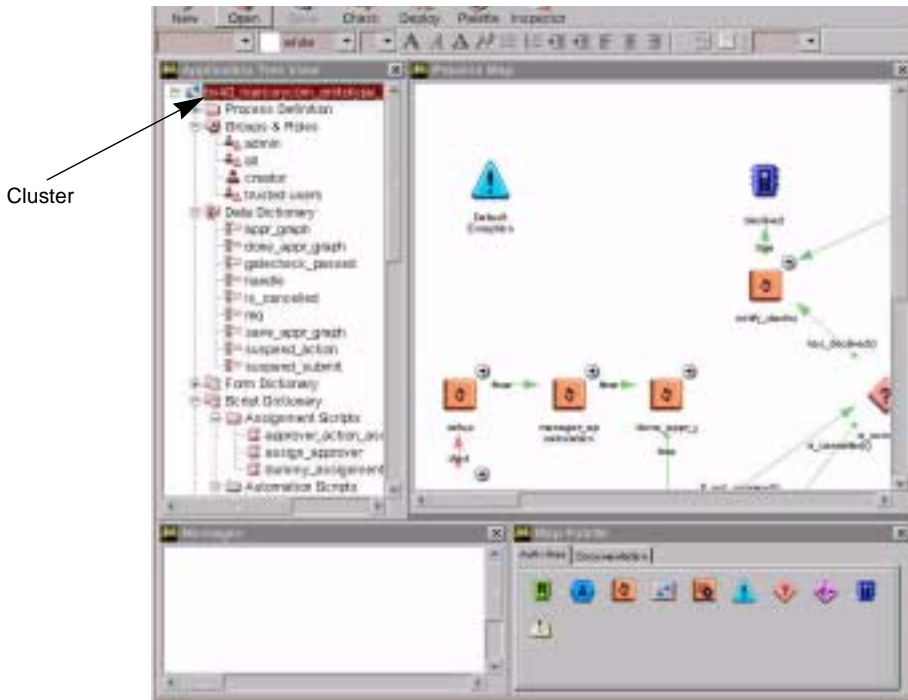


3. Enter the zip file location.

For example,

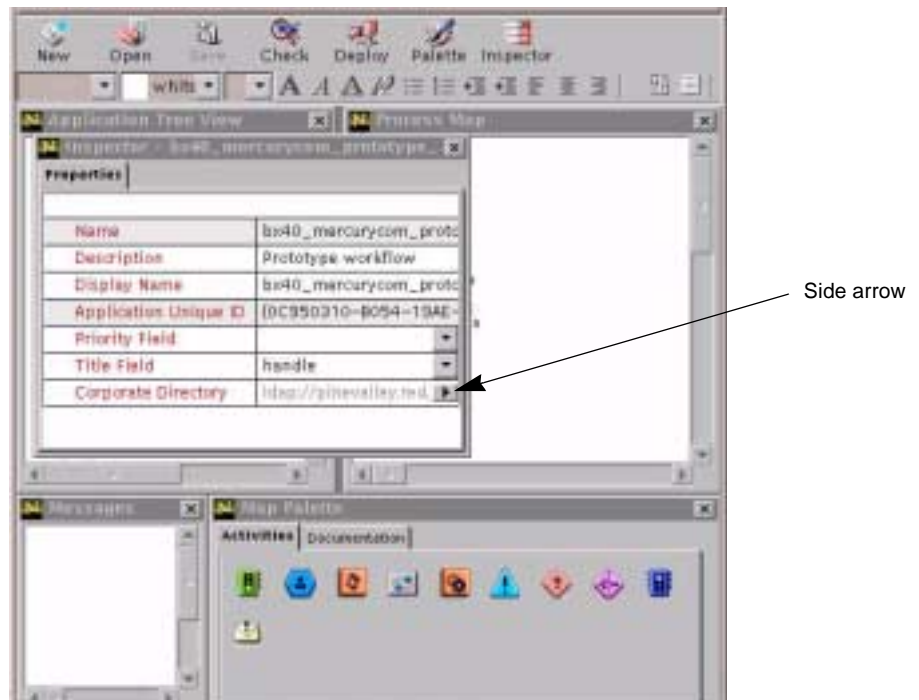
IAS_ROOT/buyer/sample_data/workflow/bx40_buyercompany_prototype_req.zip

4. Click OK.
5. The cluster that you just set up displays on the left side of the screen.

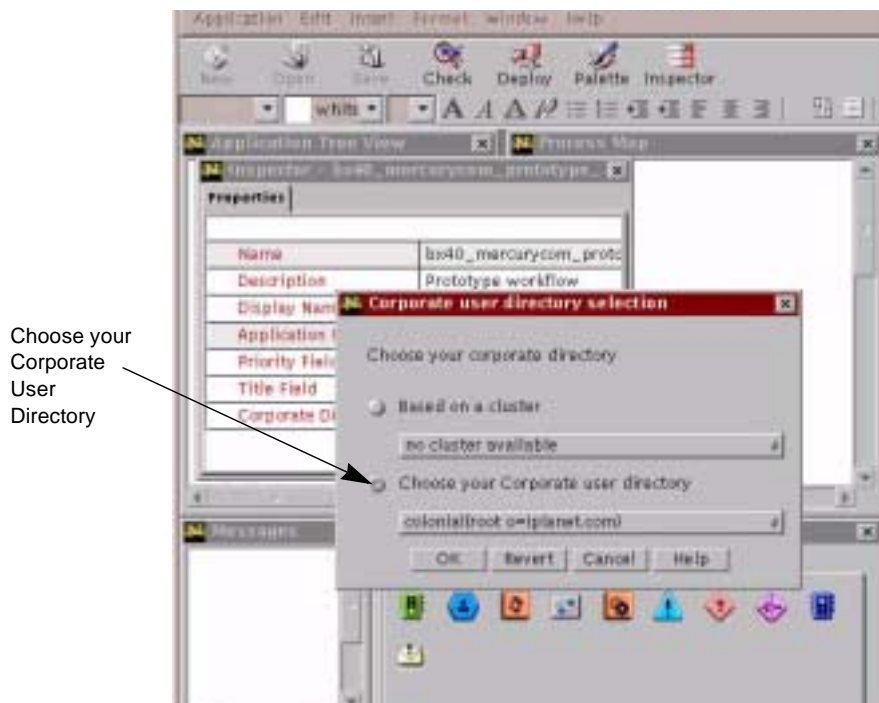


6. Double click the *bx40_buyercompany_prototype* file name on the left side of the screen.

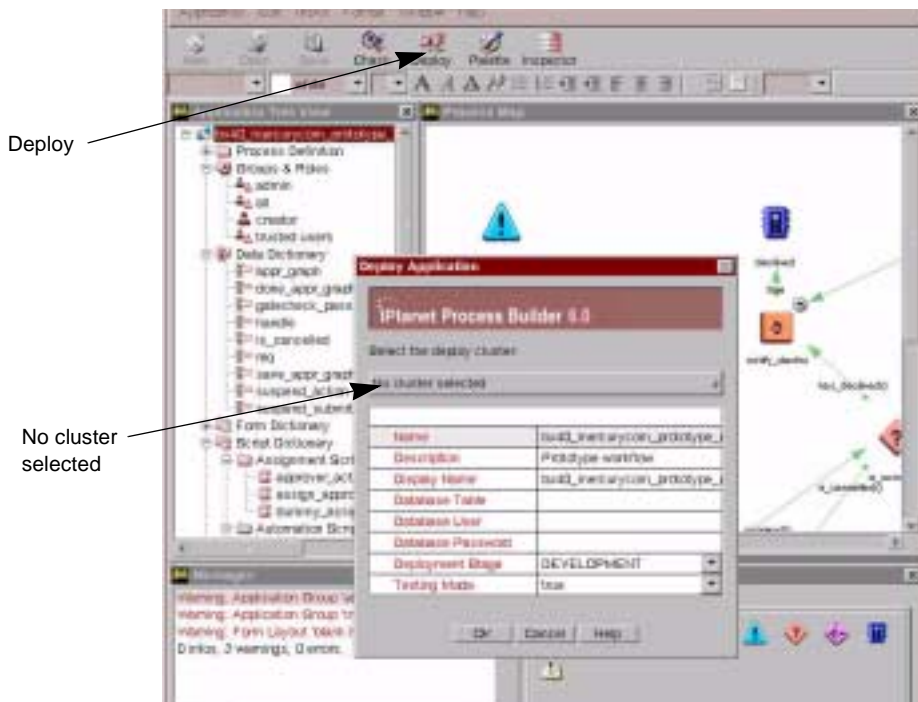
The Inspector screen displays.



7. Verify that the corporate directory contains the correct machine name.
If not, click the side arrow button.



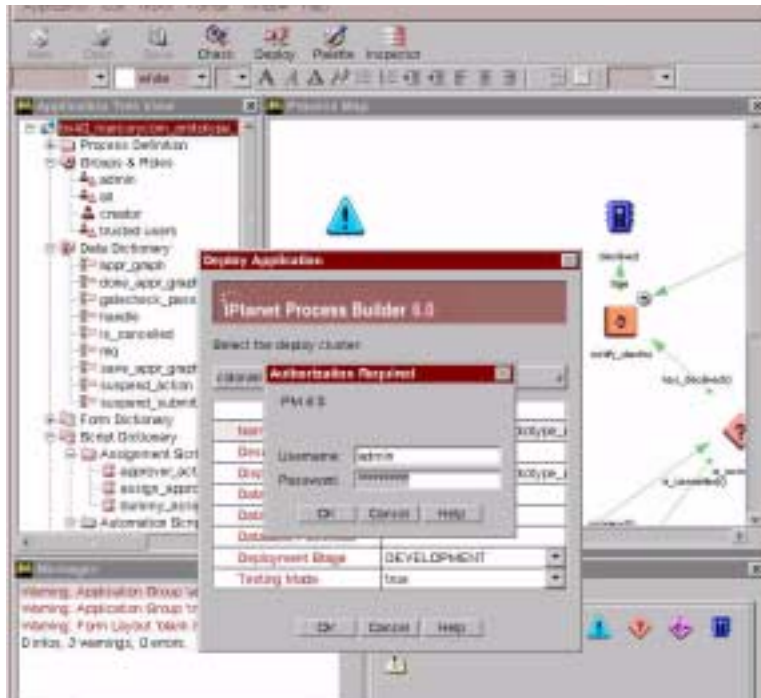
8. Select Choose Your Corporate User Directory.
9. Click OK.
10. Close the Inspector screen.
11. Click Save.



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

13. Select the cluster by clicking No Cluster Selected.

The drop down menu displays with the cluster that you previously created.



14. Enter your iAS user ID.

15. Enter your iAS password.

16. Click OK.

The Successful Deployment screen displays.

17. Go to the browser and enter the following URL:

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

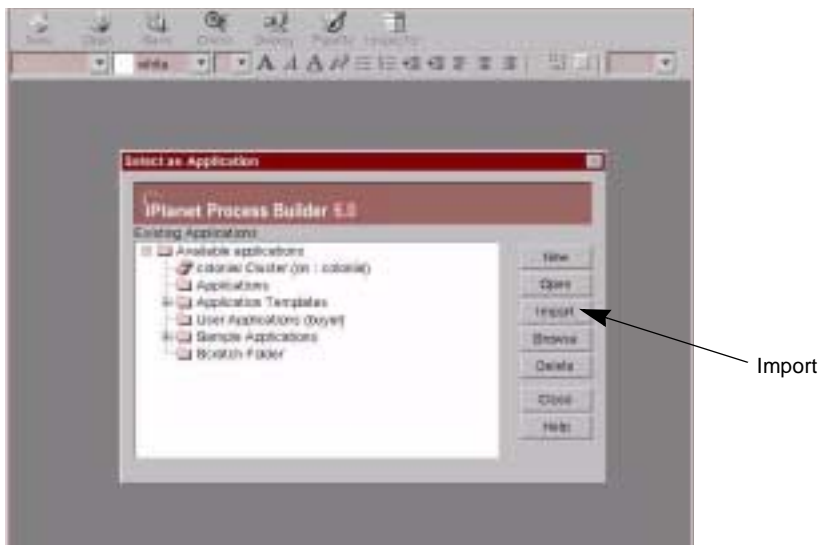
18. Click the New Process tab.

The name of the application that you just deployed displays.

Importing Timecard Application

1. Run the Process Builder again:

`IAS_HOME/builder/Builder.sh`



2. Click Import.

The Import Application from ZIP File screen displays.

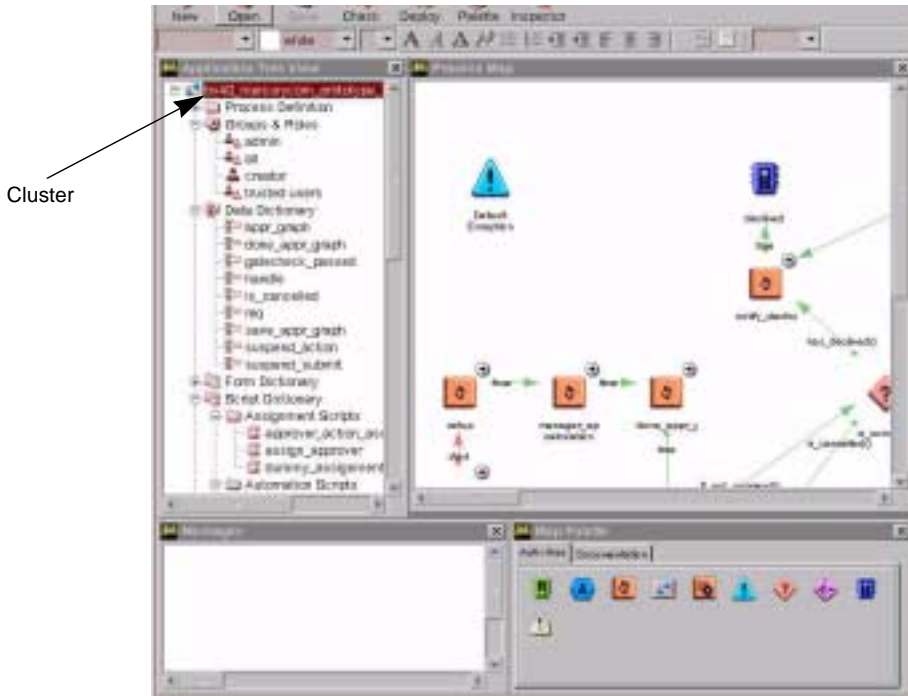


3. Enter the zip file location.

For example,

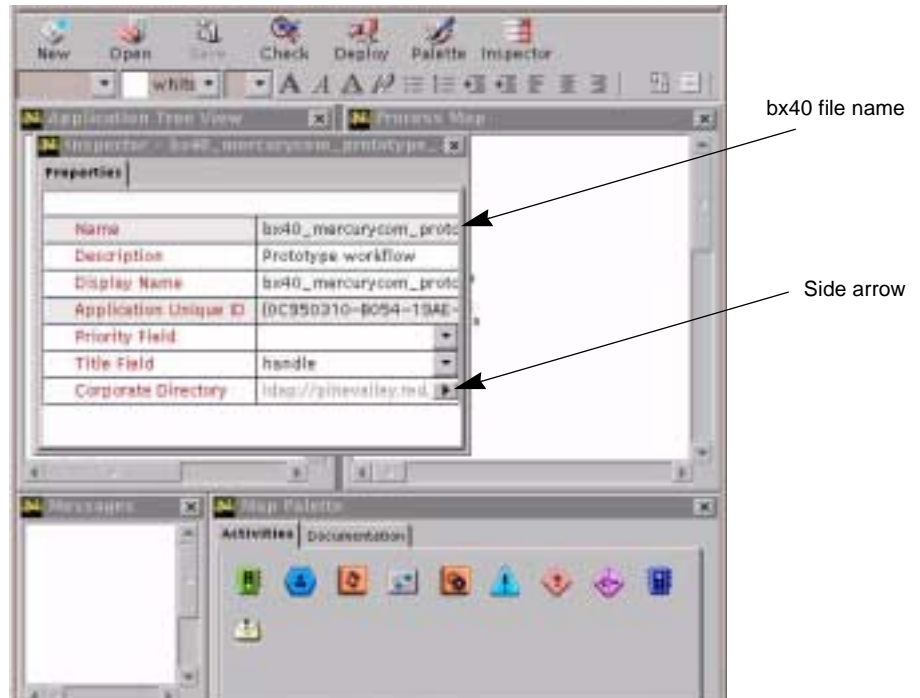
*IAS_ROOT/buyer/sample_data/timecard/bx40_buyercompany_prototype
_ tc.zip*

4. Click OK.

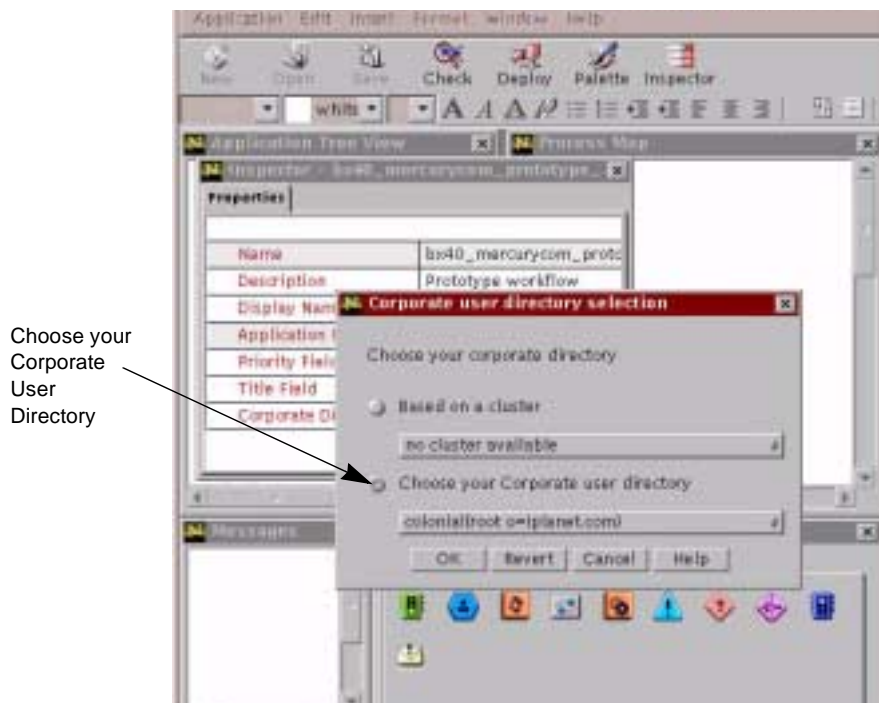


5. The cluster that you just set up displays on the left side of the screen.
6. Double click the *bx40_buyercompany_prototype* file name, located on the left side of the screen.

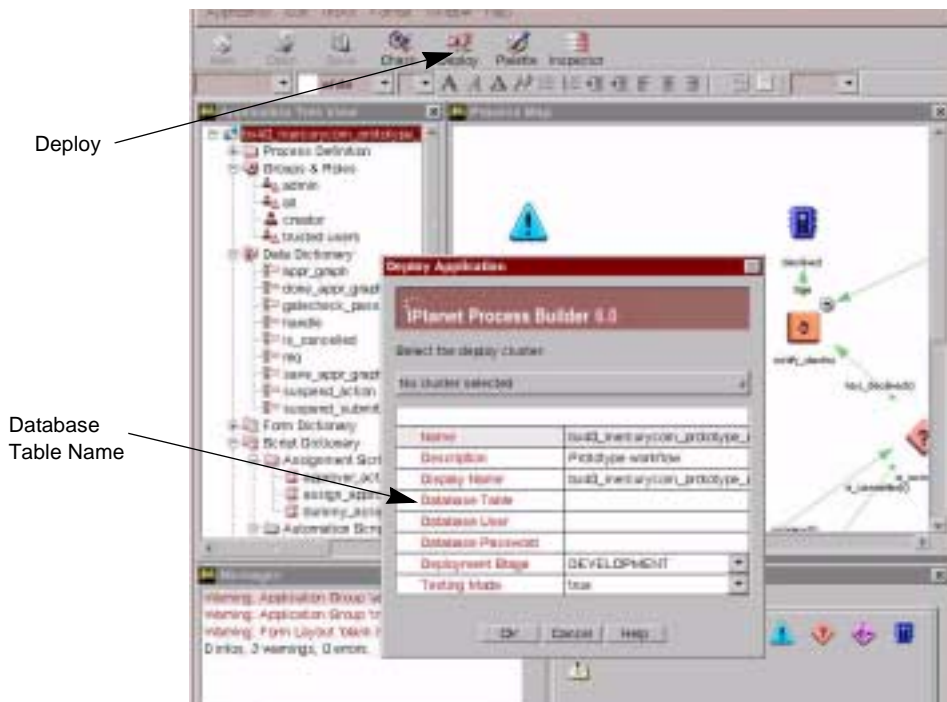
The Inspector screen displays.



7. Verify that the corporate directory contains the correct machine name.
If not, click the side arrow button.



8. Select Choose Your Corporate User Directory.
9. Click OK.
10. Close the Inspector screen.
11. Click Save.



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

The Database Table name must be changed from the previous deployment.

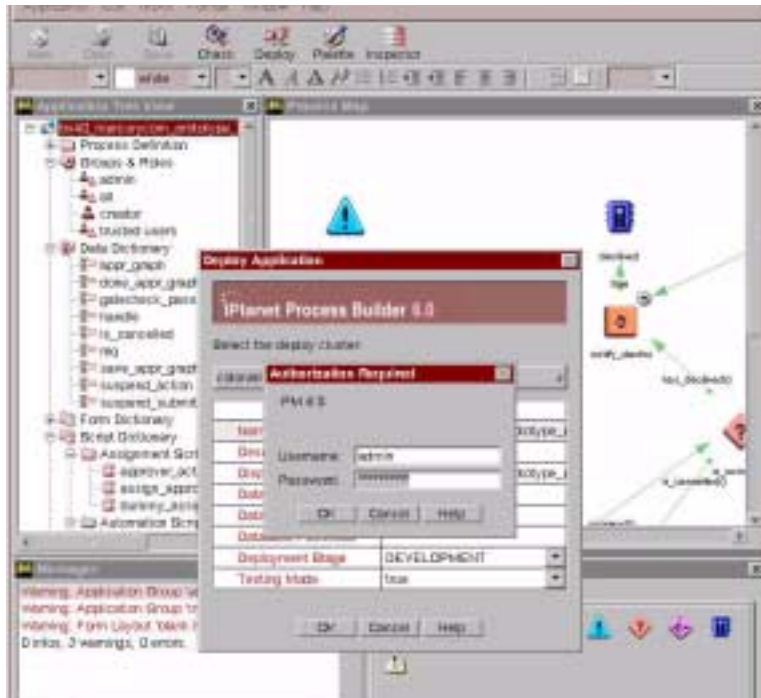
13. Click the Database Table field.

14. Enter a new name for the timecard deployment.

15. Select the cluster by clicking No Cluster Selected.

The drop down menu displays with the cluster that you previously created.

16. Click OK.



17. Enter your iAS user ID.

18. Enter your iAS password.

19. Click OK.

The Successful Deployment screen displays.

20. Go to the browser and enter the URL:

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

21. Click the New Process tab.

The name of the application that you just deployed displays.

The BuyerXpert software installation is complete.

Preparing the Seed Data Storage

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

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

- Preparing the Directory Server data storage
- Preparing the Oracle data storage
- Loading the application seed data

Preparing the Directory Server Data Storage

Before you can install seed data, you need to prepare the Directory Server data storage.

1. Create a new instance of Directory Server (see Chapter 3, Creating an iPlanet Directory Server (LDAP) Instance, for instructions).
2. Set the directory root.

For example:

```
o=iplanet.com.
```

3. Modify the schema on the Directory Server by one of the following two methods:
 - o Include the schema files.
 - a. Pick your favorite path for these configuration files, located in your BuyerXpert installation directory:

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

For example:

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

- 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

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

```
% slapd-instance/restart-slapd
```

- o Apply schema modifications specified in the `ldif` file format.

Include the schema files:

- a. Use the `schema.ldif` file, located in your BuyerXpert installation directory:
path to ias/buyer/sample_data/directory_ldif/buyer/iplanet/schema.ldif.
- b. Load the schema into a running Directory Server using `ldapmodify` as:

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

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

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

For example:

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

5. Run the script `loadSeedData.sh`:

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

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

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

Preparing the Oracle Data Storage

To prepare the Oracle data storage:

1. Create your database account

First verify that you have tablespace to do this.

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:

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

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.
-

- This script uses the following syntax:

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

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

- Valid parameters for this script are:

-b *BX_DATA* — populate BuyerXpert data only, does not load catalog name

-r *IASRoot* — IAS base directory, for example, `/export/IAS60/`

-u *USER/PASSWORD*— Oracle user login and password

-s *SYSTEM USER/PASSWORD*— Oracle system user and password

-d *DBSOURCE* — Oracle database access name

-o *ORACLE_HOME* — Pass this if you want to override the `ORACLE_HOME` environment variable.

-t *DATA TABLESPACE* — data tablespace to be used for the user

-i *INDEX TABLESPACE* — index tablespace to be used for the user

For example:

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

where:

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

- The script can be found at:

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

Loading the Application Seed Data

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

- Create the install superuser
- Import the policy book
- Clean up the install superuser

To create the install superuser in your BuyerXpert installation (without any sample data):

1. Log in using `-/-/-` as your organization, followed by login name and password.
2. Create a dummy organization for the superuser.

For example:

```
InstallOrg.
```

3. Create a user with superadmin privileges.

For example:

```
InstallUser.
```

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

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

```
KIVAes.sh start
```

5. Log in to the Admin interface as `InstallUser`.

For example:

```
InstallOrg/InstallUser/InstallUser
```

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

6. Click the Import/Export tab.

7. Select the files to be imported.

Multiple files can be imported in the same screen.

8. Import the following files in the order shown:

- a. *IAS-ROOT*/buyer/schema/cleardb.imp

This file clears the policy tables and objects.

- b. *IAS-ROOT*/buyer/schema/role.imp

This file imports roles.

- c. *IAS-ROOT*/buyer/schema/policy.imp

This file imports policies.

After the installation is complete and you are satisfied with the data, it is recommended that you delete the `InstallUser` and `InstallOrg`.

Before doing this, verify that you have other users designated as superadmins.

Installing Additional Software

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

The following sections are contained in this chapter:

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

Installing iPlanet ECXpert

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

See the iPlanet ECXpert documentation for installation instructions.

Installing iPlanet Portal Server

Installing the iPlanet Portal Server consists of the following:

- Installing iPlanet Portal Server
- Adding a New Domain

Installing iPlanet Portal Server

1. Log in as superuser to install the iPlanet Portal Server. You should run the installation as root.

```
% su - root
```

2. Unzip the distribution.

```
% gunzip iPS3.0SP3-01.tar.gz
```

3. Untar the distribution from the archive.

```
% tar -xvf iPS3.0SP3-01.tar
```

4. Start the installation process.

```
% ./ipsinstall
```

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

- o **Installation log at**
/var/sadm/install/logs/ipsinstall.5745/install.log
 - o **The product runs without a license. However, you must purchase a license from Sun Microsystems to use this product.**
5. Do you accept? [y]/n **y**
 - o Inspecting system.
 - o Inspecting network.
 6. What is the subdomain (". " for none)? [red]
 7. What is the domain? [iplanet.com]
 - o Inspecting iPS components.
 - o Preparing to install.
 8. Select which component to install:
 - 1) Server
 - 2) Gateway
 - 3) Exit
 - Choice? [3] **1**

9. What directory to install in? [/opt] /**export/portal**

10. Will this be an open portal install? y/[n] **y**

11. Use SSL protocol to the server? y/[n] **n**

12. Is this a multiple server install? y/[n] **n**

The profile server will run on `wellspring.red.iplanet.com`

13. What is the port for the profile server? [**8080**]

The directory server will run on `wellspring.red.iplanet.com`

14. What is the port for the directory server? [**389**]

15. What is the root of the role tree? [**iplanet.com**]

16. What is the user for the root of the role tree? [**root**]

17. What is the administrator port for the web server? [**8088**]

18. What is the passphrase (8 chars minimum) : **adminadmin**

19. Re-enter passphrase : **adminadmin**

Server settings:

Installation Directory : /**export/portal**

Role Tree Root : **iplanet.com**

Role Administrator : **root**

Server List : **http://wellspring.red.iplanet.com:8080**

Profile Server : **http://wellspring.red.iplanet.com:8080**

LDAP Server : **wellspring.red.iplanet.com:389**

LDAP Admin Port : **8900**

Web Server Admin Port : **8088**

Start Server : **y**

20. Are these settings correct? [y]/n **y**

When the installation is complete, it is necessary to bring up the iPlanet Portal Server using the following steps:

21. Start the iPlanet Portal Server:

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

```
% cd SUNWips/bin
```

22. Shutdown all iPlanet Portal Server related processes.

```
% ./ipsserver stop
```

23. Start up the iPlanet Portal Server.

```
% ./ipsserver start
```

This concludes the installation of the iPlanet Portal Server.

Refer to the “Portal Deployment” section of this document for instructions on integrating with iPlanet BuyerXpert.

Adding a New Domain

All the iPlanet Portal Server integration related files are included when you install iPlanet BuyerXpert. They are located in the *SERVER_ROOT/buyer/buyer/BXPORAL* directory, shown as *PORTAL_ROOT* in this document. Since the iPlanet 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 iPlanet Portal Server is installed.

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

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

NOTE The name of the machine running iPlanet Portal Server is *machinename* and *port* is the port number of the iPlanet WebServer where iPlanet Portal Server is running.

2. Type *root* as the user name, and the root password of your machine as the password.
3. After you log in, click the Manage Domains Link on the left panel.
4. Click Add New Domain, located in the right panel.
5. Enter the buying company name for the domain name (for example, BuyerCompany) and Buyer for the Default Role.
6. Click Create.

You should see the following message:

Successfully Created New Domain

7. Click Continue.
8. Choose the domain that you just created, click Authentication, select Membership from the Authentication Screen and click Submit.
9. Log out from the console.

Portal Deployment

Portal Deployment consists of the following:

- Deploying the Authentication Modules
- Deploying the Channels
- Copying the Required Libraries
- Configuring the iPlanet BuyerXpert Webserver
- Adding the Channels to the User's Profile
- Testing Single Sign-on

Deploying the Authentication Modules

The BuyerXpert integration in portal relies on certain iPlanet BuyerXpert-specific attributes being created in the user profile when a new user is created. This step changes some of the template files used by the portal authentication module to facilitate creation of the specific attributes, and is therefore a necessary step. You need to go through the following sequence to get this to work:

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/templates/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. Copy the new template for UserInfo:

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

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

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

7. Start up iPlanet Portal Server:

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

8. Import the component:

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

If things go well, you should see the following message:

```
Operation Completed Successfully
```

9. Edit the /etc/opt/SUNWips/xml/iwtTag.xml file, adding the following lines in the <iwt:Att name="iwtTag-tags" section after the line userConfigurable="TRUE">

```
<Val>bxAuth-bxUserName|profile</Val>
<Val>bxAuth-bxpassword|profile</Val>
<Val>bxAuth-bxsignon|profile</Val>
<Val>bxAuth-bxName|profile</Val>
```

10. Save.

11. Import the `iwtTag.xml` file:

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

12. To test what you have done so far:

- a. Access the domain that you created after you installed iPlanet Portal Server.
- b. On the login page for that Domain, click *New User*.

You should see a form with some iPlanet BuyerXpert specific fields (for example, BuyerXpert User Id).

13. Complete the form and register.

If the submission goes through correctly, a disclaimer page is displayed. Otherwise, an error displays on the browser page.

Deploying the Channels

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

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

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

2. Edit the entries in the `buyerInfo.properties` file so that you point to the correct database, LDAP, and iPlanet BuyerXpert settings.
3. The `headerNames.properties` file contains the field names for the track and inbox channels. It can be customized by the administrator to his or her own choice of field names. Copy the `headerNames.properties` file to the same directory as your `buyerInfo.properties` file:

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

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

5. Copy the XML descriptors for the channels:

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

6. Edit all the XML descriptors to reflect the location of the properties file.

- a. Open the descriptors in your preferred text editor.
- b. Look for an attribute called "fileLocation".
- c. Change the value for this attribute from "/export" to the location of the properties file.
- d. Save.
- e. Close the descriptors.

7. Import the XML descriptors using the ipsadmin script.

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

8. After importing each of the descriptors, you should see the following message:

```
Operation Completed Successfully
```

9. Copy the class files to the portal:

```
% cp -r PORTAL_ROOT/classes/com
<portal-server-installation-directory>/SUNWips/lib/
% mkdir -p
<portal-server-installation-directory>/SUNWips/public_html/servlet
% cp PORTAL_ROOT/classes/*.class
<portal-server-installation-directory>/SUNWips/public_html/servlet/
```

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

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

- o Edit the jvm12.conf file, locate the jvm.classpath variable and append <portal-server-installation-directory>/SUNWips/public_html/servlet

11. Add all of the iPlanet BuyerXpert channels to the available channels list:

a. Access the iPlanet Portal Server admin console by entering the URL:
`http://<machinename>:<port>/console.`

b. Log in as root.

c. Click the Manage Domains link.

d. Select the domain that you created.

e. Expand the Applications link.

f. Select Desktop.

The Available and Selected Providers list windows appear.

g. In the Channel Name text box, enter:

```
iwtReqStatProfileProvider
```

h. In the Class Name text box, enter:

```
com.iplanet.portalserver.providers.buyerx.RegStatProfileProvider
```

i. Click Add.

j. Click Submit to update the Profile Server.

k. In the Channel Name text box, enter:

```
iwtInboxProfileProvider
```

l. In the Class Name text box, enter:

```
com.iplanet.portalserver.providers.buyerx.InboxProfileProvider
```

m. Click Add.

n. Click Submit to update the Profile Server.

o. In the Channel Name text box, enter:

```
iwtReqTrackProvider
```

p. In the Class Name text box, enter:

```
com.iplanet.portalserver.providers.buyerx.RegTrackingProvider
```

q. Click Add.

r. Click Submit to update the Profile Server.

- s. In the Channel Name text box, enter:
`iwtTCTrackProvider`
- t. In the *Class Name* text box, enter:
`com.iplanet.portalserver.providers.buyerx.TCTrackingProvider`
- u. Click Add.
- v. Click Submit to update the Profile Server.
- w. In the Channel Name text box, enter:
`iwtInboxTrackProvider`
- x. In the Class Name text box, enter:
`com.iplanet.portalserver.providers.buyerx.InboxTrackingProvider`
- y. Click Add.
- z. Click Submit to update the Profile Server.
- aa. Click the Logout link to logout of the console.

Copying the Required Libraries

1. Shut down the iPlanet Portal Server server
2. Copy the Oracle JDBC driver and JDBC jar files from the iPlanet BuyerXpert installation directory to the portal server lib directory

```
% cp <IAS_SERVER_ROOT>/buyer/lib/classes12.jar  
<portal-server-installation-directory>/SUNWips/lib/
```

```
% cp <IAS_SERVER_ROOT>/ias/classes/java/jdbc20.jar  
<portal-server-installation-directory>/SUNWips/lib/
```

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

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

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

Configuring the iPlanet BuyerXpert Webserver

Due to security issues with Javascript, we changed the way content is rendered after a user is authenticated in iPlanet BuyerXpert. So it becomes necessary for us to configure the iPlanet WebServer that iPlanet BuyerXpert uses. This step requires copying some HTML template files to the docroot of the iPlanet BuyerXpert webserver (usually the directory called *docs*).

1. Copy the `inbox.html`, `welcome.html` and `track.html` templates to the docroot of the iPlanet BuyerXpert webserver.

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

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

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

2. Verify that the entries for `bxInboxScreen`, `bxWelcomeScreen`, and `bxTrackScreen` in the `buyerInfo.properties` files reflect the correct URLs for the three files that you just copied.

Adding the Channels to the User's Profile

All the required configuration steps have now been completed and you should test to see if you can view the channels as follows:

1. Log in to the iPlanet Portal Server as a user by accessing the following URL (if you are a new user, click the new user button to set yourself up):

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

2. Select the Content link and add one or all of the iPlanet BuyerXpert channels to the desktop.

The channel information is displayed.

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

The thin channels also display iPlanet BuyerXpert-specific information for the user in a much more concise fashion. For example, instead of displaying all the open requisition IDs, the thin channel for Open Requisitions only displays a count of the number of requisitions that are incomplete, pending approval, and so forth.

Testing Single Sign-on

Single sign-on is enabled for every user by default unless “no” or “false” was entered during new user registration.

If you are not sure what your settings are:

1. Log in to the iPlanet Portal Server.
2. Click Edit in the User Information channel (top left corner of the page).

There is a BuyerXpert Information section that contains all relevant settings.

If the value for “Enable Single sign-on” field is either “false” or “no”, then it has been disabled for you.

3. If you want to change your BuyerXpert settings:
 - o Edit the relevant fields.
 - o Click Finished.

If single sign-on has been enabled for you:

- o Click the Requisition ID in the iPlanet BuyerXpert Track Requisition channel to automatically log in to iPlanet BuyerXpert. The Track Requisitions screen displays in a separate browser window.
- o Click the Requisition ID in the BuyerXpert Approval Inbox channel to automatically log in to iPlanet BuyerXpert. The Approval Inbox screen displays in a separate browser window.
- o Click any link in the thin channels to go to its relevant screen in iPlanet BuyerXpert.

Installing Reuters Multi-Currency Live Feed

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

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

Features of the multi-currency live feed include:

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

HTML Format

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

XML Format

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

Before Installing

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

More information can be found at:

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

Installation of Multi-Currency Live Feed

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

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

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

currConv.load.PullData.serverPort=8080

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

currConv.load.PullData.reutersPort=80

currConv.load.PullData.reutersSession=SESSION_ID

currConv.load.PullData.reutersFormat=XML

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

currConv.load.PullData.outDir=YOUR_OUT_DIR

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

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

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

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

# in billerXpert
#####

#####

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

```

source $BX_HOME/billxpert_env.csh (NEED MODIFY FOR BX4.5)
#####
# Please change the values accordingly
#####
setenv DATABASEPROFFILE $BX_HOME/currconv/database.properties
setenv REUTERS_PROP $BX_HOME/currconv/CCLoad.properties
# Pull data
$JAVA_HOME/bin/jre com.iplanet.ecomm.currconv.load.PullData
$REUTERS_PROP
# here get the OUTPUTDIR from the properties file.
setenv OUTPUTDIR `grep currConv.load.PullData.outDir
${REUTERS_PROP} | sed 's/.*/`/`
# load data
if ( -d $OUTPUTDIR/.Pulldata ) then
    ${JAVA_HOME}/bin/jre com.iplanet.ecomm.currconv.load.CCLoad
$OUTPUTDIR/.Pulldata
    $DATABASEPROFFILE reuter ${REUTERS_PROP}
else
    echo $OUTPUTDIR
    echo " Data Pull FAILED \!\!\! "
endif

```

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

```

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

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

```

```
</Convert>
```

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

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

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

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

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



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

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

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

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

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

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

5. Run the script `getData.csh`.
6. Check the logs.

The Error logs are kept in `/tmp` directory (for example, `CCLoadErr<date>_<time>.log`).

Shutting Down, Starting and Uninstalling BuyerXpert

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

The following sections are contained in this chapter:

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

Shutting Down Procedures

Shutting Down BuyerXpert

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

Shutting Down Directory Server

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

Shutting Down iPlanet Application Server

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

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

Shutting Down iPlanet Web Server

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

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

Starting Procedures

Starting iPlanet Web Server

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

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

Starting iPlanet Application Server

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

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

Starting Directory Server

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

Starting BuyerXpert

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

Uninstalling BuyerXpert

1. Make sure iAS has stopped:
% **KIVaes.sh stop**
2. Use the uninstall program, following the instruction on screen to uninstall the software:
% **java uninstall_buyerXpert**
3. Follow the prompt to uninstall the software.

New Sample Data

This chapter describes the new sample data for iPlanet BuyerXpert 4.5.

Sample Data

Company Name - Buyer Company

User Groups

- Catalog Browsers
- Catalog Super Admin
- Company Admin
- Employees

Roles

We have the standard set of roles.

- Sysadmin
- OrgAdmin
- SelfAdmin

Locations

- BuyerCompany Bill-To Location 1
- BuyerCompany Bill-To Location 2

- BuyerCompany Ship-To Location 1
- BuyerCompany Ship-To Location 2

Org Units

This is similar to the original sample data (mercury.com).

- Locations
- Executive Office
- Sales, Executive Office
- East Coast Sales, Sales, Executive Office
- East Coast Region 1, East Coast Sales, Sales, Executive Office
- EC Sales Team 1, East Coast Region 1, East Coast Sales, Sales, Executive Office
- EC Sales Team 2, East Coast Region 1, East Coast Sales, Sales, Executive Office
- East Coast Region 2, East Coast Sales, Sales, Executive Office
- EC Sales Team 3, East Coast Region 2, East Coast Sales, Sales, Executive Office
- EC Sales Team 4, East Coast Region 2, East Coast Sales, Sales, Executive Office
- West Coast Sales, Sales, Executive Office
- West Coast Region 1, West Coast Sales, Sales, Executive Office
- WC Sales Team 1, West Coast Region 1, West Coast Sales, Sales, Executive Office
- WC Sales Team 2, West Coast Region 1, West Coast Sales, Sales, Executive Office
- West Coast Region 2, West Coast Sales, Sales, Executive Office
- WC Sales Team 3, West Coast Region 2, West Coast Sales, Sales, Executive Office
- WC Sales Team 4, West Coast Region 2, West Coast Sales, Sales, Executive Office

Following are the users, and their association of roles and iPlanet Market Maker privileges. All of these users belong to OrgUnit “Executive Office”.

Table A-1 Users, Roles, Privileges

Company Name	Users	BuyerRole	iPlanet Market Maker Privileges
BuyerCompany	askip	orgadmin	CatalogBrowse
	paul	selfadmin	CatalogBrowse
	david	selfadmin	CatalogBrowse
	aaron	sysadmin	CatalogBrowse CatalogSuperAdmin CompanyAdmin
	peter	selfadmin	CatalogBrowse
	julie	selfadmin	CatalogBrowse
	jeffe	selfadmin	CatalogBrowse
	nancy	selfadmin	CatalogBrowse
	kevin	sysadmin	CatalogBrowse CatalogSuperAdmin CompanyAdmin
	michael	selfadmin	CatalogBrowse
	ronnie	sysadmin	CatalogBrowse
	glenn	orgadmin	CatalogBrowse Employees
	robin	sysadmin	CatalogBrowse
	claire	selfadmin	CatalogBrowse
	rohan	orgadmin	CatalogBrowse
	antonio	sysadmin	CatalogBrowse
	vandy	selfadmin	CatalogBrowse
	zanutto	selfadmin	CatalogBrowse Employees
	jennifer	selfadmin	CatalogBrowse Employees
	jacquelyn	selfadmin	CatalogBrowse Employees
jackson	sysadmin	CatalogBrowse Employees	

NOTE The username and password are the same for login.

Time Card Creators

- Kevin
- Nancy

Troubleshooting

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

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

Try restarting iWS.

I Cannot Add to the Cart with Sample Data

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

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

```
[https-hostname]: start failed (2: unknown early startup error)
[https-hostname]: failure: watchdog could not connect to
notification port ( Connection refused )
```

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

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

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

1. Create LDAP schema:

```
IAS_HOME/shared/bin/ldapmodify -h hostname -p LDAP_port_number -c -a -D irectory_user -w directory_user_password -f
```

```
IAS_HOME/buyer/sample_data/directory_ldif/buyer/iplanet/schema.ldif
```

For example:

```
/export/IAS60/shared/bin/ldapmodify -h colonial -p 20000 -c -a -D "cn=Directory Manager" -w adminadmin -f
```

```
/export/IAS60/sample_data/directory_ldif/buyer/iplanet/schema.ldif)
```

2. Import LDAP data:

```
IAS_HOME/shared/bin/ldapmodify -h hostname -p LDAP_port_number -c -a -D directory_user -w directory_user_password -f
```

```
IAS_HOME/buyer/sample_data/directory_ldif/buyer/iplanet/BuyerXpertSample.ldif
```

where:

IAS_HOME is the location where IAS is installed

hostname is the machine name

LDAP_port_number the port number when creating the LDAP instance

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

directory user password the password for the directory user

For example:

```
/export/IAS60/shared/bin/ldapmodify -h colonial -p 20000 -c -a -D "cn=Directory Manager" -w adminadmin -f
```

```
/export/IAS60/sample_data/directory_ldif/buyer/iplanet/BuyerXpertSample.ldif)
```

I Cannot See the Sample Catalog After Installation

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

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

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

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

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

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

where:

IAS_HOME is the location where IAS is installed

user_name is the user to be created in oracle

password is the user password created in Oracle

Example

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

3. Run the `import_data.sh` script.

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

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

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

IAS_HOME/ias/bin/KIVAes.sh start

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

where:

IAS_HOME is the location where the iPlanet Application Server is installed

URL is where iPlanet BuyerXpert is running

login name is the user login name of the Admin interface

password is the user password

organization_name is the user organization name

Example

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

Workflow deployment failed; descriptor failed an internal sanity check.

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

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

```
TABLE_NAME
```

```
-----
```

```
DUAL
SYSTEM_PRIVILEGE_MAP
STMT_AUDIT_OPTION_MAP
AUDIT_ACTIONS
PSTUBTBL
AURORA$IIOPIOP$SYSTEM$PROPERTIES
```

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

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

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

```
21 rows selected.
```

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

```
Table dropped.
```

```
SQL> commit;
```


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