Oracle® Retail Customer Engagement Cloud Service (Relate)

Installation Guide - Installer
Release 11.1
E79518-01
Revision 2

September 2016

ORACLE

Oracle® Retail Customer Engagement Cloud Service (Relate), Installation Guide - Installer, Release 11.1

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CONTENTS

Chapter 1: Introduction 5

Who Should Use This Guide 6

Related Documents 6

Supported Platforms 7

Application Server Operating System 7

Database Server Software 7

Required Materials 7

Installing Java Development Kit (JDK) Version 1.7.x 8

Modifying the Environment Variables (Windows) 10

Modifying the Environment Variables (Linux) 12

Chapter 2: Installation 13

Overview 13

Assumptions 14

Installation Process 14

Database Installation 15

SQL Server Installation 15

Oracle Installation 24

Create the New Database 33

SQL Server 33

Oracle 34

Upgrade the Database 35

SQL Server 35

Oracle 35

Relate Installation 36

Initial Configuration 48

Chapter 3: Initial Configuration 49

Overview 49

Segment Management Query Templates **50**
Start Relate Services **50**
Log In **51**
Perform Initial Configuration **52**
Import Users and User Configurations (New Installation) **52**
Import New Franchisee CSV File 54
Import User CSV File 56
Import Roles CSV File 58
Import Franchisee Assignment CSV File 59
Appendix A: Start/Stop Relate Services **61**
Overview **61**
Windows **61**
Service 61
Start 61
Stop 62
Non-Service 62
Start 62
Stop 62
Linux **63**
Start 63
Stop 63
Appendix B: Secure Sockets Layer (SSL) **64**
Overview **64**
Create the SSL Certificate **65**
Enable SSL for Relate **67**
Appendix C: Revision History **71**

CHAPTER 1

Introduction

The rebranding for the latest version of this documentation set is in development as part of post MICROS acquisition activities. References to former MICROS product names may exist throughout this existing documentation set.

The *Relate Installation Guide - Installer* provides the procedures and instructions necessary to perform either a full installation/configuration of the Relate application and its associated database, or an upgrade to Oracle Relate™ 11.1.

If you are upgrading from a previous version of Relate earlier than version 11.0, please contact your project manager for more information.

This document is intended only as a guide for a typical implementation. Since implementations will differ from customer-to-customer, it is up to the person performing the implementation to know when and how to deviate from this guide.

Refer to the following chapters for the information you need to get started:

- Chapter 2, "Installation" on page 13, describes the installation and configuration of Relate Services and the database using an installer that will guide you through the entire installation process.
- Chapter 3, "Initial Configuration" on page 49, provides instructions for configuring Relate Services after it has been installed.
- Appendix A: "Start/Stop Relate Services" on page 61, provides instructions for starting and stopping Relate in Windows and Linux.
- Appendix B: "Secure Sockets Layer (SSL)" on page 64 provides procedures for creating SSL certificates and enabling SSL in Relate.

Who Should Use This Guide

This guide is intended for anyone responsible for the installation and configuration of, or the upgrade to, Relate 11.1, including Operations Technical Support and Customer Technical Support.

Anyone using this guide should have a working knowledge of XML, the network system being used and, depending upon the environment and system you are using, SQL Server or Oracle database, and the Windows or the Linux operating system.

Related Documents

The following documents are part of the Relate CRM documentation suite and may be helpful when configuring/validating the Relate application. These documents can be found on the Relate 11.1 Installation CD-ROM in the `/documentation` directory.

Relate User Guide - The *Relate User Guide* provides the end user with instructions/details on how to use the Web Interface to the CRM Server. It aids the user by describing information required to perform an operation, what the information is used for (if necessary), and how different pieces of information interact with each other (if necessary).

Batch Processing & Web Services Guide - Provides users with information, examples, and guidelines needed to compose SOAP-based and XML messages for the Relate application (through batch file processing and the web interface), and how to integrate applications with Relate through WSDL interfaces.

Relate Database Dictionary - The *Relate Database Dictionary* provides users with a description of the Relate database tables, fields, relationship diagrams, and default data.

Relate Configuration Guide - The *Relate Configuration Guide* provides a description of the Relate configuration tool as well as instructions, requirements, and information concerning the configuration of the Relate application and database. The settings include both those set at the time of installation and those that may be changed at a later date.

Supported Platforms

The following list describes the minimum requirements necessary to install and run Relate 11.1 and its associated database.

Application Server Operating System

- ❑ Windows Server 2008 R2 SP1 running a 64-bit Java Virtual Machine
- ❑ OpenSuse version 12.3

At least 8 GB of RAM is required on the application server.

Database Server Software

- ❑ MS SQL Server 2012 SP1 (running on Windows Server 2008 R2 SP1)
- ❑ Oracle 11gR2 - Release 11.2.0.2 (running on Windows Server 2012)

Required Materials

The following materials are required to complete the installation and configuration of the Relate application and the associated database.

"Installed" means that the item must be installed before the Relate installation can begin.

- ❑ Relate 11.1.xx Installation CD-ROM
- ❑ Operating System (Installed)
- ❑ Database Server (Installed)
- ❑ Java™ SE Development Kit 7 (JDK version 1.7) (Installed)

  For instructions on installing JDK 1.7, see "Installing Java Development Kit (JDK) Version 1.7.x" on page 8.

Installing Java Development Kit (JDK) Version 1.7.x

Oracle's Java Development Kit (JDK) is used for running Java applets and applications. The latest version of the kit can be downloaded from:
http://www.oracle.com/technetwork/java/javase/downloads/jdk7-downloads-1880260.html

Similar steps will need to be performed in Linux to install the Java Development Kit (JDK) Version 1.7.x.

1. Check to see if there is an existing version of Java on the server by entering the following command:

   ```
   C:\> java -version
   ```

2. The system will present the version number if there is an existing Java version. Note the version number of the Java version installed.
   - ❑ If nothing is returned, continue with next step.
   - ❑ If an older version exists (e.g. Java 1.6.x_xx) continue with next step.
   - ❑ If the command returns Java 1.7.x_xx, skip to "Modifying the Environment Variables (Windows)" on page 10.

3. Download and run the `jdk-7uXX-windows-vvvv.exe` application, where:
   - ❑ `XX` is the revision number.
   - ❑ `vvvv` is either `i586` or `x64`, depending upon the system on which the installation is being performed.

   The Java installer opens.

Figure 1-1: Java Installer

4. Click **Next** to continue.

   The Choose Program Features step opens.

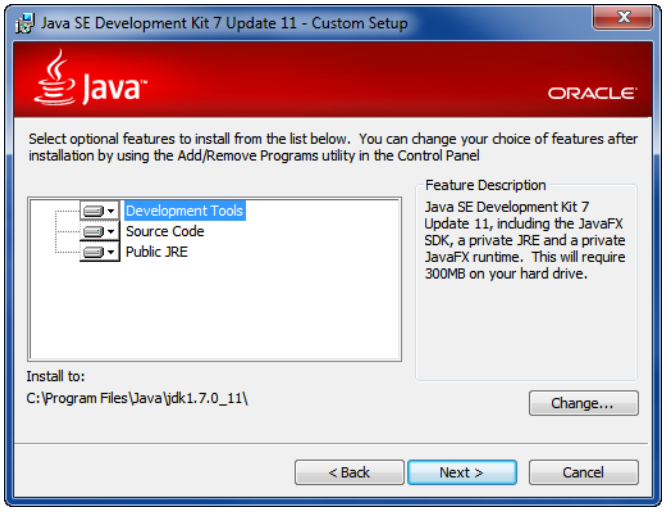


Figure 1-2: Choose Program Features

5. Click **Next** to perform the installation.

   While performing the setup, accept all of the defaults.

   The program installs Java SDK 7, which includes JDK 1.7, the Java FX SDK, the Java Runtime Environment (JRE), and the Java plug-in on the web server.

6. Click **Finish** to complete the JDK installation.

Figure 1-3: Finish Installation

Once the JDK has been installed, add an Environment Variable for Java and add the Java directories to the web server's path.

Modifying the Environment Variables (Windows)

Update the server's Environment Variables and path by performing the following:

1. In the **Start** menu, select **Control Panel**.
2. If Control Panel is organized by category, click to open **System and Security**.
3. Click **System**.
4. Click the **Advanced system settings** link on the left side of the window.

   The System Properties window opens on the Advanced tab.
5. Click the **Environment Variables** button.

   The Environment Variables window opens.
6. Check to see if the `JAVA_HOME` variable already exists.
   - ❑ If the variable does not exist, continue with the next step.
   - ❑ If the variable does exist, check whether its value is `c:\Program Files\Java\jdk1.7.0_XX` (where `XX` is the revision number).
     Note: *The short name cannot be used here*.
     - ❍ If the variable exists, but the value is not correct, continue with step 12.
     - ❍ If the value is correct, continue with step 15.

> *The path may differ if you installed the JDK to a directory other than the default.*

7. In the System Variables pane, click **New** to open the New System Variable dialog box.

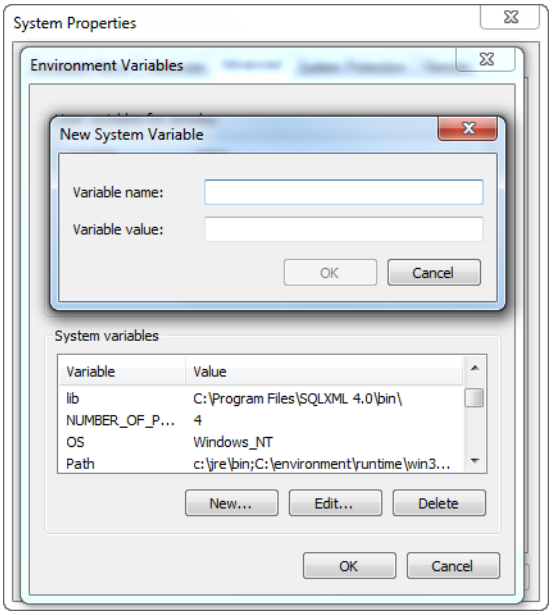


Figure 1-4: Add New System Variable

8. Enter `JAVA_HOME` in the **Variable name** field. Ensure that the variable name is all upper case.
9. Enter `c:\Program Files\Java\jdk1.7.0_XX`, where `XX` is the revision number. If the JDK has been installed somewhere other than in `c:\Program Files`, enter the absolute path to the `\jdk1.7.0_XX` directory.
10. Click **OK** to save the system variable information.

    Continue with step 15.
11. If the JAVA_HOME variable exists, but is not set to the correct value, click the **JAVA_HOME** variable in the System Variables list to select it.
12. Click **Edit**.

    The Edit System Variable window opens.

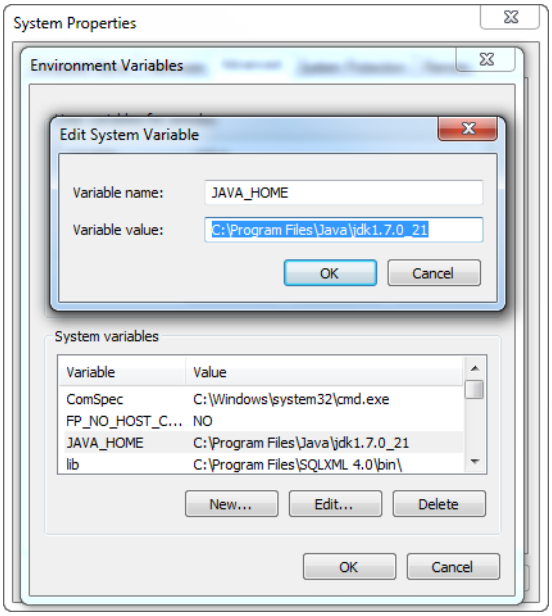


Figure 1-5: Edit Java Home

13. In the **Variable value** field, enter `c:\Program Files\Java\jdk1.7.0_XX`, where `XX` is the revision number. If the JDK has been installed somewhere other than in `c:\Program Files`, enter the absolute path to the `jdk1.7.0_XX` directory.
14. Click **OK** to save the system variable information.

    Continue with the next step.

15. While in the Environment Variables window, from the System Variables pane, click to highlight the **Path** system variable, then click **Edit**.

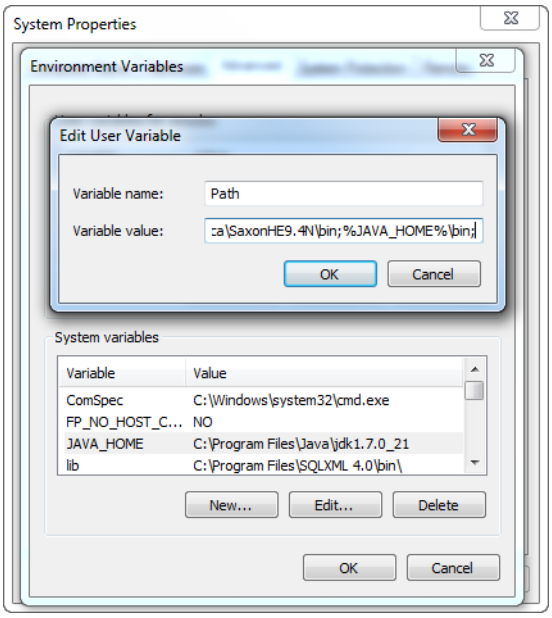


Figure 1-6: Edit Path

16. Check whether the value `%JAVA_HOME%\bin` already exists. If it does, you are finished with this procedure.

    Otherwise, continue with the next step.

17. In the **Edit System Variable** dialog box, click to place the cursor in the **Variable value** field, then press the [End] key. This places the cursor at the end of the path.

18. Append the following to the end of the value in the **Variable value** field:

    `;%JAVA_HOME%\bin`

19. Click **OK** to save the System Variables.

20. In the Environment Variables window, click **OK** to save the Environment Variable information.

21. Exit the Control Panel.

Modifying the Environment Variables (Linux)

Several commands must be run to prepare Java for Relate. However, the commands required for setting environment variables in Linux will depend upon the Linux distribution used, the shell used, and the installation directory for Java. Therefore, you will need to determine the commands required to perform the following tasks.

1. Check whether the **$JAVA_HOME** variable is set to the `jdk1.7.0_XX` directory. If it is not, set **$JAVA_HOME** to the absolute path to the `jdk1.7.0_XX` directory.

2. Check whether the **$PATH** variable includes the `$JAVA_HOME\bin` value. If it does not, add `$JAVA_HOME\bin` to the **$PATH** variable.

CHAPTER 2

Installation

Overview

This chapter describes:

- The installation procedure for Relate 11.1.
- The upgrade procedure for Relate 11.1 from an earlier version.

This installation will not completely configure Relate, it will only configure the system settings. The rest of the settings must be configured before Relate can be used. See *Chapter 3, "Initial Configuration" on page 49* *and the* **Relate Configuration Guide** *for more information.*

Assumptions

This chapter assumes the following:

- The host computer has a server Operating System (OS) installed (see "Application Server Operating System" on page 7).
- Java Development Kit (JDK) 1.7.x has been installed.
- The database software (see "Database Server Software" on page 7) has been installed.
- Information such as Organization ID, database name, database username/password, etc. is available.
- An SSL certificate is available for Relate ("Create the SSL Certificate" on page 65).

New installations of Relate require an SSL certificate. Upgrades do not require an SSL certificate.

Installation Process

The installation process consists of the following steps:

1. Run the database installer for your database.
   - ❑ If you are installing an SQL Server database, see "SQL Server Installation" on page 15.
   - ❑ If you are installing an Oracle database, see "Oracle Installation" on page 24.
2. Create or upgrade the database.
   - ❑ If you are creating a SQL Server database, see "SQL Server" on page 33.
   - ❑ If you are creating an Oracle database, see "Oracle" on page 34.
   - ❑ If you are upgrading a SQL Server database, see "Upgrade the Database" on page 35.
3. Run the Relate installer (see "Relate Installation" on page 36).
4. Configure the software (see Chapter 3, "Initial Configuration" on page 49).

Database Installation

SQL Server Installation

*At any time during the installation process, click **Cancel** to exit the process without saving any settings that may have been entered.*

Use the following procedure to install a SQL Server database:

- *A SQL Server database installation can only be performed by the Windows installer. The Linux database installer does not include the option to install a SQL Server database.*
- *A SQL Server database server should not be used with a Linux application server. This configuration is not supported and may result in unpredictable behavior in Relate.*

1. Insert the Database Installation CD into the CD-ROM drive.

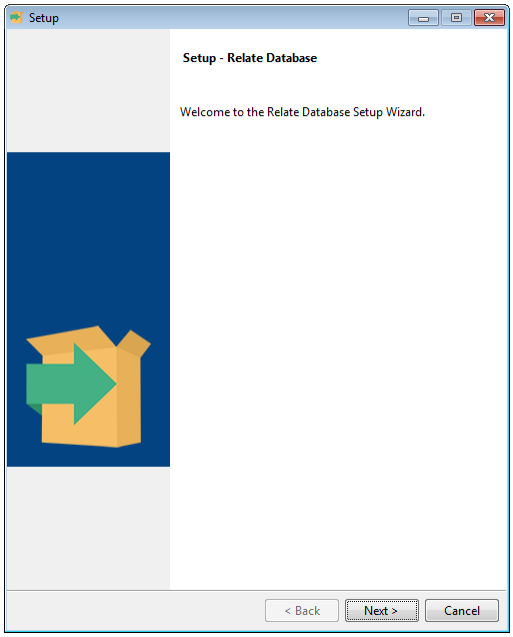


Figure 2-1: Welcome Screen

If the Installer does not automatically start:

a. Open a browser and navigate to the CD drive.

b. Double-click the `Relate-db-11.1.00.xx.exe` file.

The Welcome screen will be displayed.

c. Click **Next** to move to the next step.

2. If necessary, change the Installation Directory. Click **Next** to move to the next step.

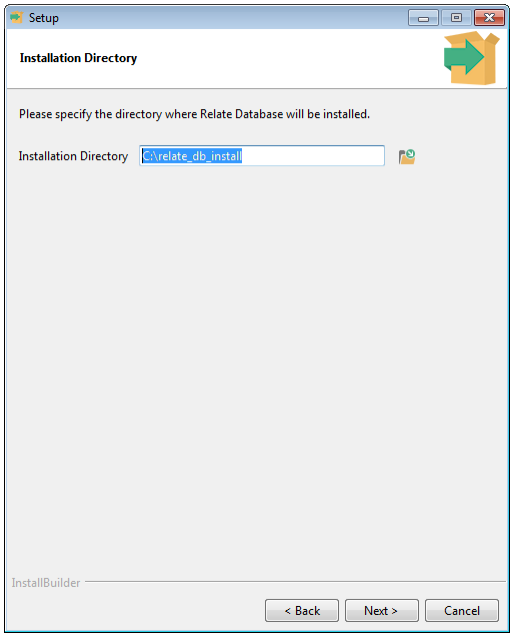


Figure 2-2: Installation Directory

If the entered directory exists, the installation program will display a warning message that the existing directory will be renamed. Click **OK** *to confirm the message and continue.*

To browse for a directory, do the following:

a. Select the folder icon next to the entry field. A Browse for Folder window opens.

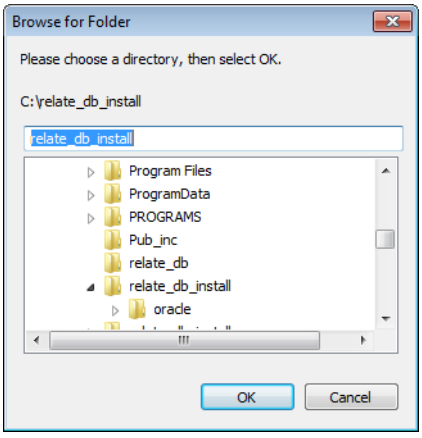


Figure 2-3: Browse for Folder

b. Navigate through the directory structure to locate the proper folder.

c. Click on the folder to select it, then click **OK**.

The full path of the folder appears in the entry box.

3. Click the checkbox for the database and installation type you are performing. Click **Next** to move to the next step.

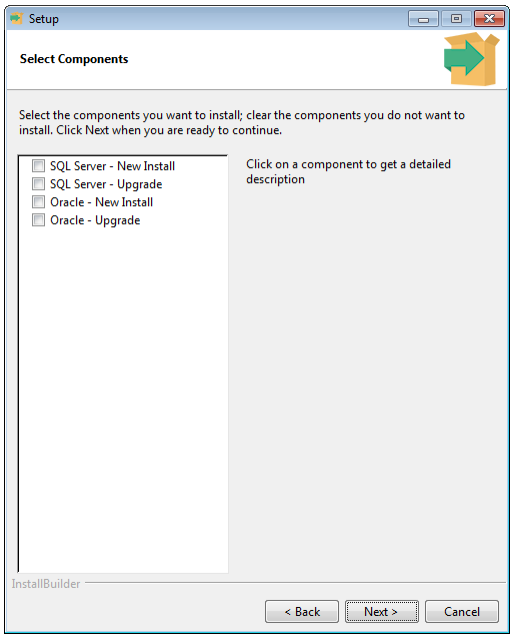


Figure 2-4: Select Components

Select one, and only one, database component.

a. If this is a new installation for SQL Server:

1) Check **SQL Server - New Install**.

2) Click **Next**, then continue with step 5.

b. If this is an upgrade installation for SQL Server:

1) Check **SQL Server - Upgrade**.

2) Click **Next**, then continue with the next step.

4. Enter the name of the Relate database. Click **Next** to continue with step 9 on page 22.

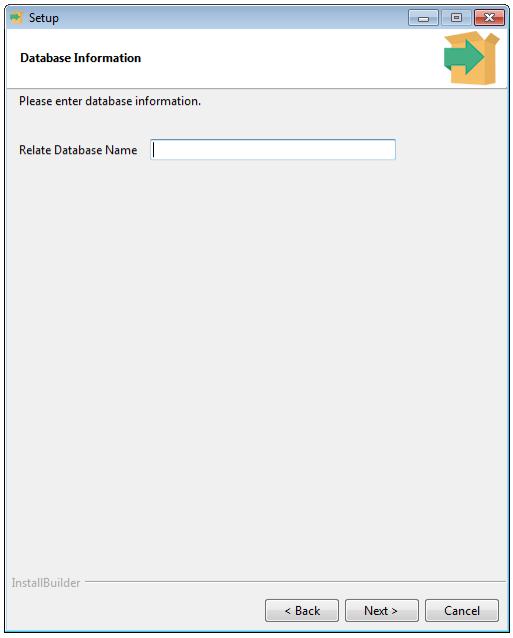


Figure 2-5: Database Information

5. Enter the following information for your organization:

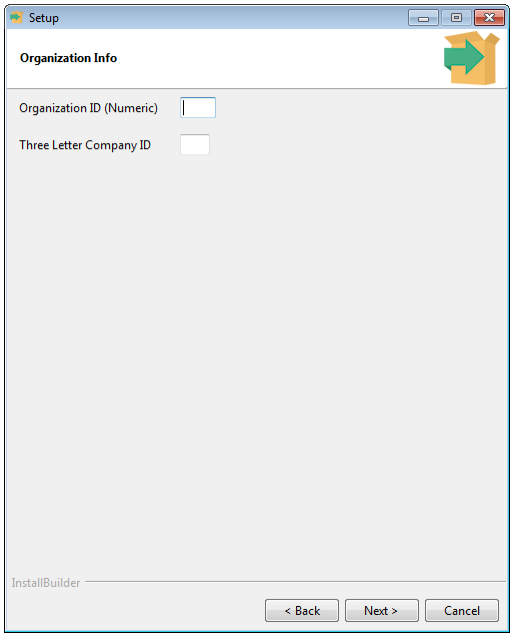


Figure 2-6: Organization Info

a. **Organization ID (Numeric)** - The 3-digit identification number assigned to your organization.

b. **Three Letter Company ID** - This 3-character company ID is also assigned to your organization.

When you are finished, click **Next** to move to the next step.

6. Define the database information.

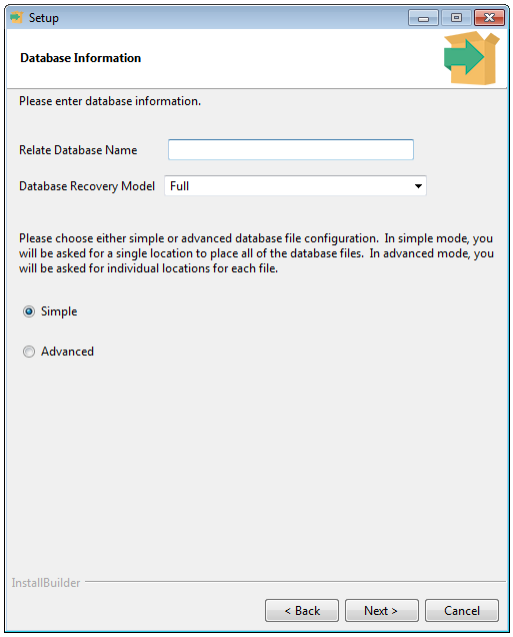


Figure 2-7: Database Information (New Install)

a. Enter the **Relate Database Name**.

b. Select the **Database Recovery Model**: **Full** or **Simple**.

c. Select whether you are performing a **Simple** or **Advanced** database file configuration, then click **Next** to continue with the next step.

- **Simple** - All database files are placed in a single specified directory.
- **Advanced** - Different database files are placed in separate directories that are specified individually.

d. Click **Next** to continue.

- If you selected **Simple** database file, continue with the next step.
- If you selected **Advanced** database file configuration, continue with step 8.

7. Select the location of the database files, then click **Next** to continue with step 9.

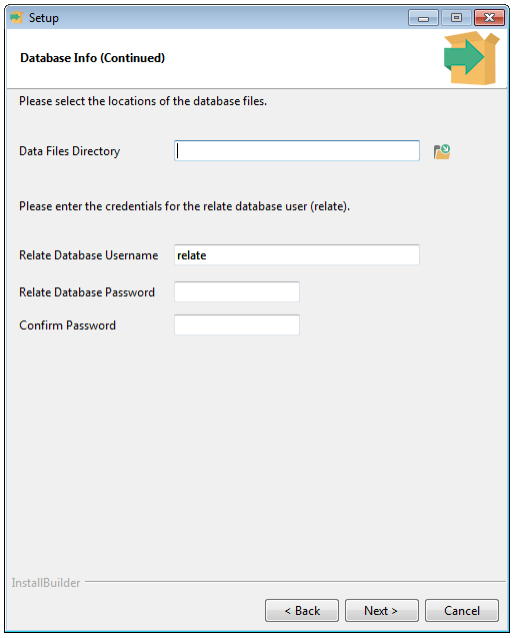


Figure 2-8: Database File Locations - Simple

To browse for a directory, do the following:

a. Select the folder icon next to the entry field. A Browse for Folder window opens.

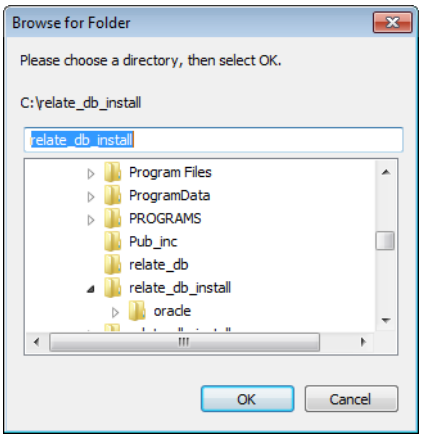


Figure 2-9: Browse for Folder

b. Navigate through the directory structure to locate the proper folder.

c. Click on the folder to select it, then click **OK**.

The full path of the folder appears in the entry box.

d. Click **Next** to continue with step 9.

8. If you selected **Advanced** database file configuration in step c:

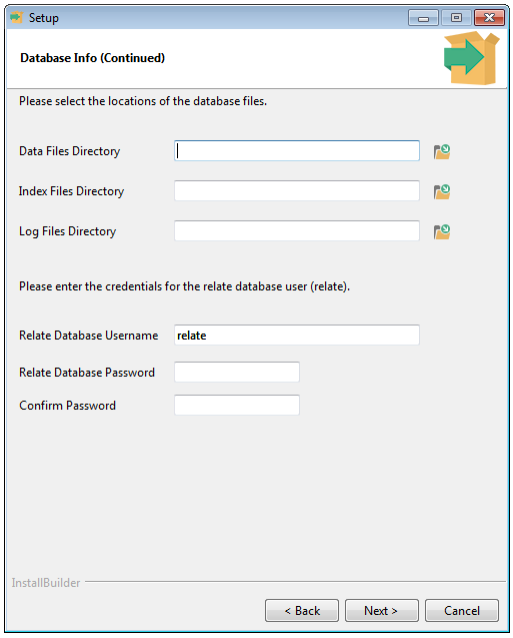


Figure 2-10: Database File Locations (SQL Server)

a. Select the locations for the database files.

To browse for a directory, do the following:

1) Select the folder icon next to the entry field. A Browse for Folder window opens.

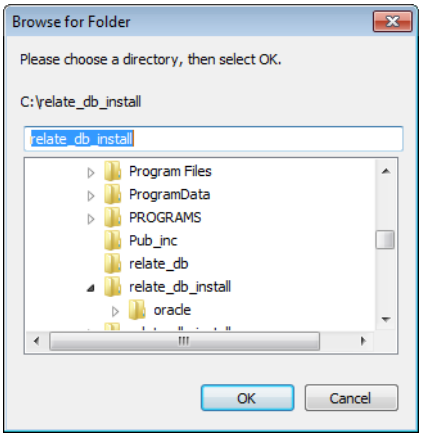


Figure 2-11: Browse for Folder

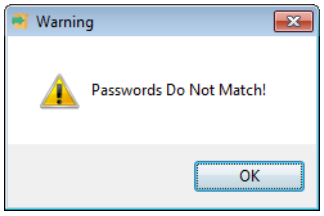
2) Navigate through the directory structure to locate the proper folder.

3) Click on the folder to select it, then click **OK**.

The full path of the folder appears in the entry box.

b. Enter the database owner credentials:

1) **Relate Database Username** - This will be used by Relate to connect to the database.
2) **Relate Database Password** - Password for the username.
3) **Confirm Password** - If this does not match the password already entered, a dialog box is displayed with a warning. Click **OK** to return to the Relate User Credentials screen.



When you are finished, click **Next** to continue.

9. Click **Next** to begin the installation. When the installation is complete, the Finish screen is displayed.

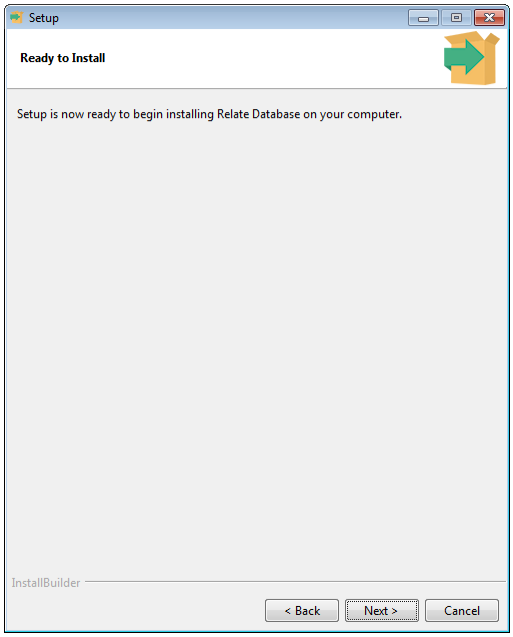


Figure 2-12: Ready to Install

10. Click **Finish** to close the Installation Wizard.

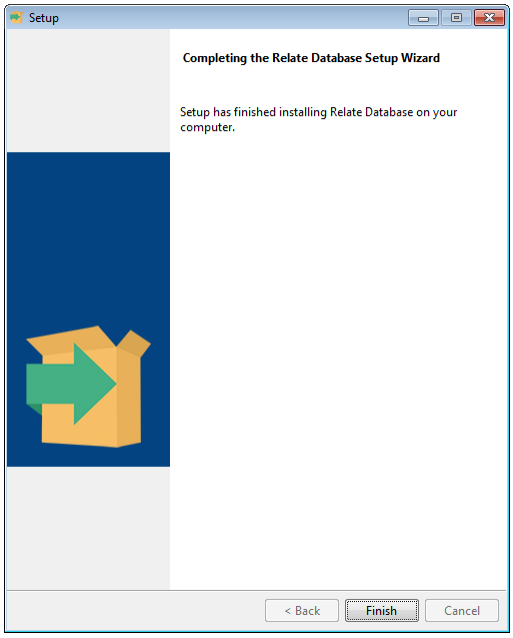


Figure 2-13: Installation Complete

Oracle Installation

*At any time during the installation process, click **Cancel** to exit the process without saving any settings that may have been entered.*

Use the following procedure to install an Oracle database:

1. Insert the Database Installation CD into the CD-ROM drive.

The look and feel of the installer and installation paths entered will be different if you are installing in a Linux environment; however, the steps will mostly be the same.

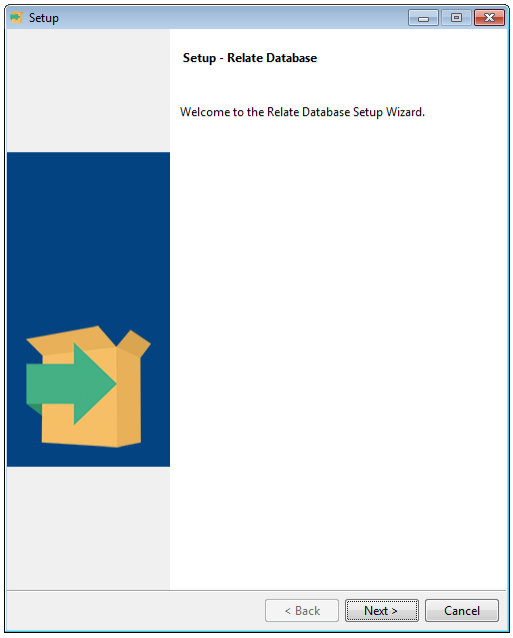


Figure 2-14: Welcome Screen

If the Installer does not automatically start:

a. Open a browser and navigate to the CD drive.

b. Run the installation program for your operating system:

- **Windows** - Double-click the `Relate-db-11.1.00.xx.exe` file.
- **Linux** - Double-click the `Relate-db-11.1.00.xx.run` file.

The Welcome screen will be displayed.

c. Click **Next** to move to the next step.

2. If necessary, change the Installation Directory. Click **Next** to continue with the next step.

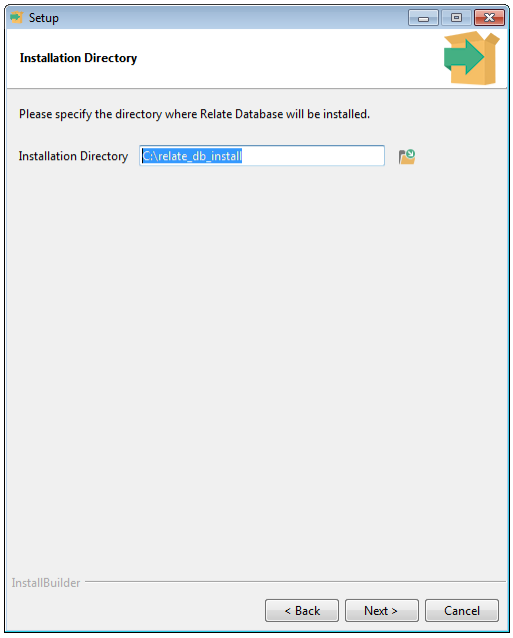


Figure 2-15: Installation Directory

If the entered directory exists, the installation program will display a warning message. Click **OK** *to confirm the message and continue.*

To browse for a directory, do the following:

a. Select the folder icon next to the entry field. A Browse for Folder window opens.

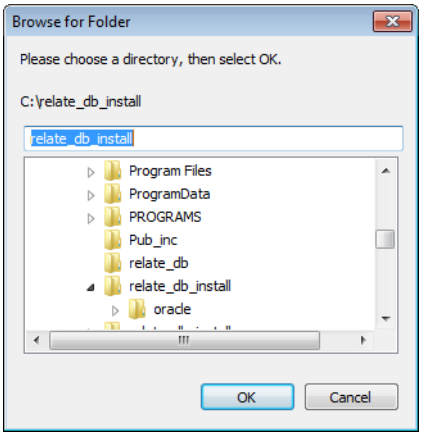


Figure 2-16: Browse for Folder

b. Navigate through the directory structure to locate the proper folder.

c. Click on the folder to select it, then click **OK**.

The full path of the folder appears in the entry box.

3. Click the checkbox for the database and installation type you are performing. Click **Next** to move to the next step.

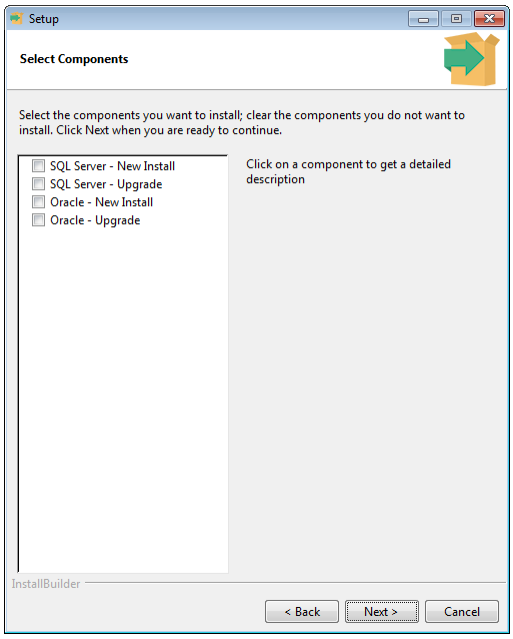


Figure 2-17: Select Components

- *Select one, and only one, database platform.*
- *The Linux database installer will only provide the "Oracle" options.*

a. If this is a new installation:

1) Check **Oracle - New Install**.

2) Click **Next**, then continue with step 4.

b. If this is an upgrade installation for Oracle:

1) Check **Oracle - Upgrade**.

2) Click **Next**, then continue with step 8.

4. Complete the following information for your organization:

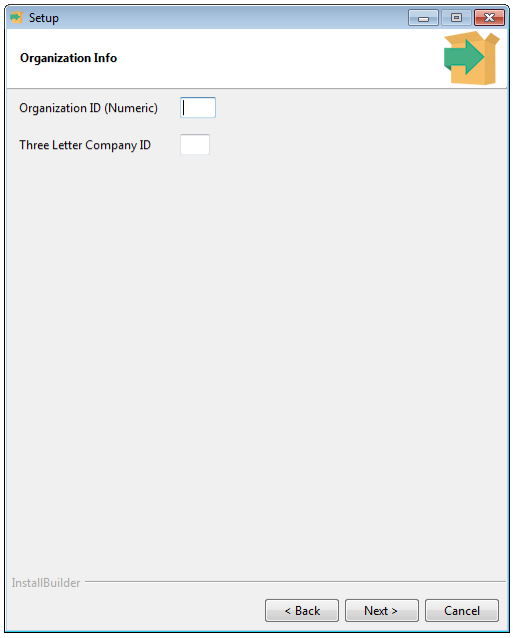


Figure 2-18: Organization Info

a. **Organization ID** - The 3-digit identification number assigned to your organization.

b. **Three Letter Company ID** - This 3-character company ID is also assigned to your organization.

When you are finished, click **Next** to move to the next step.

5. Select whether you are performing a **Simple** or **Advanced** database file configuration, then click **Next** to continue.

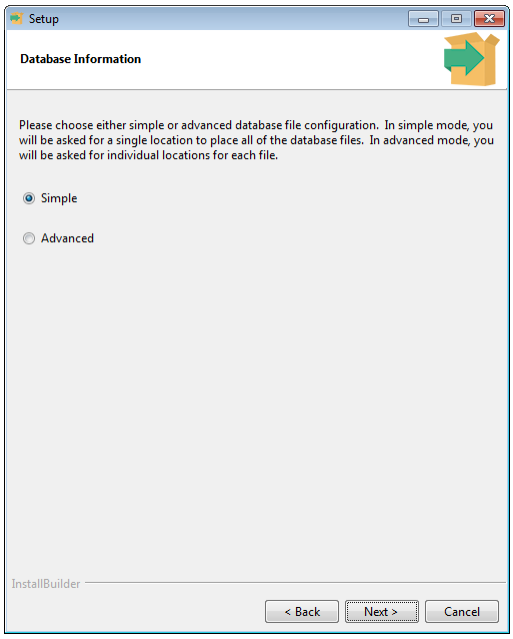


Figure 2-19: Simple or Advanced Database File Locations

- **Simple** - All database files are placed in a single specified directory.

  After selecting **Simple**, click **Next** to continue with the next step.

- **Advanced** - Different sets of database files are placed in separate directories that are specified individually.

  After selecting **Advanced**, click **Next** to continue with step 7.

6. Select the location of the database files, then click **Next** to continue with step 8.

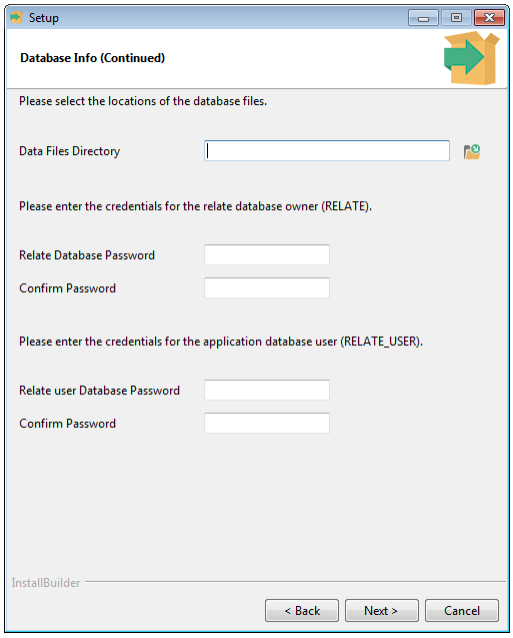


Figure 2-20: Database File Locations - Simple

a. Select the locations for the database file.

To browse for a directory, do the following:

1) Select the folder icon next to the entry field. A Browse for Folder window opens.

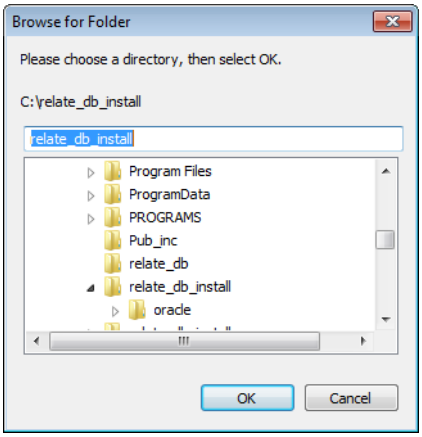


Figure 2-21: Browse for Folder

2) Navigate through the directory structure to locate the proper folder.

3) Click on the folder to select it, then click **OK**.

The full path of the folder appears in the entry box.

b. Enter the login credentials for the user RELATE:

1) **Relate Database Password** - Password for the RELATE username.

2) **Confirm Password** - If this does not match the password already entered, a dialog box is displayed with a warning.

c. Enter the login credentials for the user RELATE_USER:

1) **Relate User Database Password** - Password for RELATE_USER username.

2) **Confirm Password** - If this does not match the password already entered, a dialog box is displayed with a warning.

When you are finished, click **Next** to continue with step 8.

7. Select the locations of the database files.

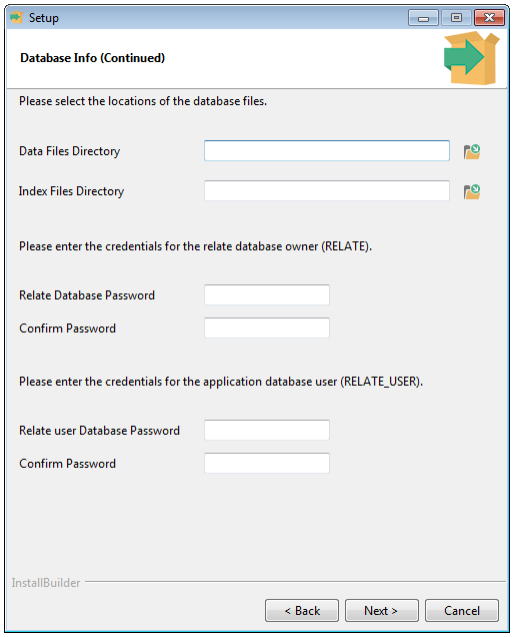


Figure 2-22: Database File Locations - Advanced

a. Select the locations for the database file.

To browse for a directory, do the following:

1) Select the folder icon next to the entry field. A Browse for Folder window opens.

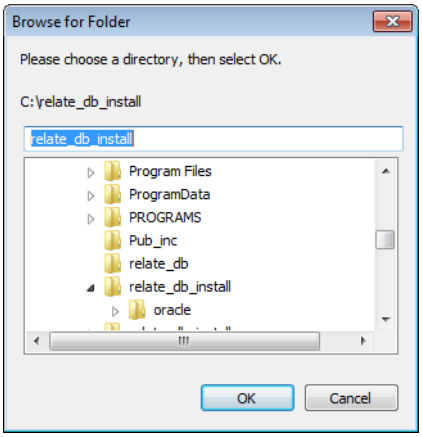


Figure 2-23: Browse for Folder

2) Navigate through the directory structure to locate the proper folder.

3) Click on the folder to select it, then click **OK**.

The full path of the folder appears in the entry box.

b. Enter the login credentials for the user RELATE:

1) **Relate Database Password** - Password for the RELATE username.

2) **Confirm Password** - If this does not match the password already entered, a dialog box is displayed with a warning.

c. Enter the login credentials for the user RELATE_USER:

1) **Relate User Database Password** - Password for RELATE_USER username.

2) **Confirm Password** - If this does not match the password already entered, a dialog box is displayed with a warning.

When you are finished, click **Next** to continue with the next step.

8. Click **Next** to begin the installation. When the installation is complete, the Finish screen is displayed.

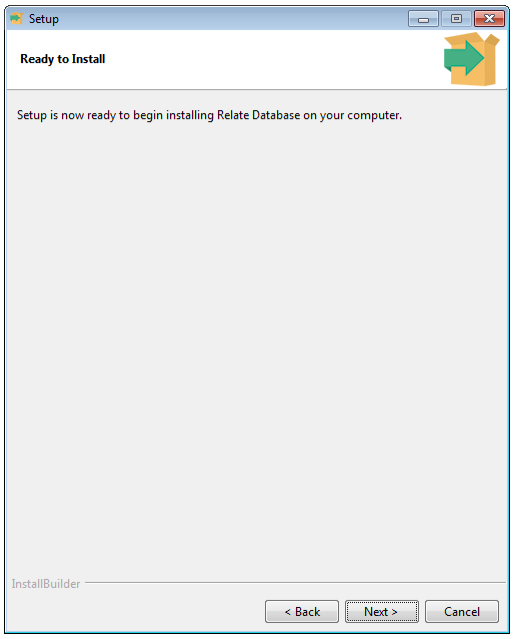


Figure 2-24: Ready to Install

9. Click **Finish** to close the Installation Wizard.

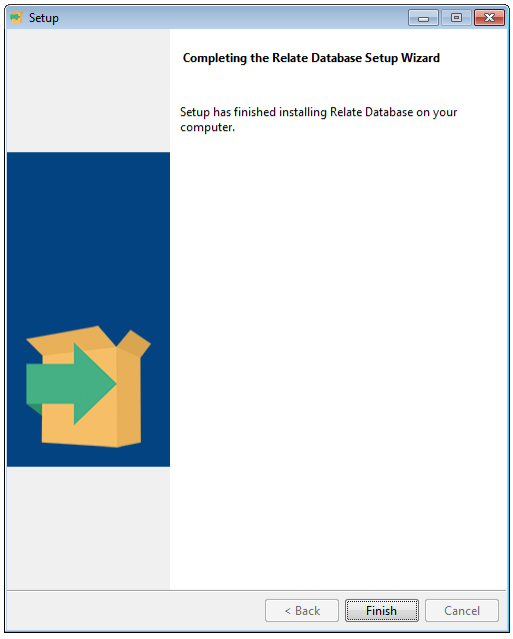


Figure 2-25: Installation Complete

Create the New Database

If you selected an Upgrade installation option in the Relate Database Setup Wizard, do NOT perform the procedures in this section. Proceed to "Upgrade the Database" on page 35.

This process will create a new Relate database. This sample database contains tables, fields, etc. for Relate to use.

SQL Server

Look for errors after running each of the following scripts. If any errors occur, contact your product representative for assistance.

1. Locate the database creation files. These files are located in the `sqlserver` directory within the directory specified in step 2 of the "Database Installation" on page 15 procedure.
2. Open the file `01CreateDB.sql` using your database interface software (e.g. SQL Server Management Studio).
3. Execute the script `01CreateDB.sql`.

   The database is created.
4. Open and execute the script `02CreateUser.sql`.

   Usernames and passwords for the database are created.
5. Open and execute the script `03CreateRelate.sql`.

   Database tables are created.
6. Open and execute the script `04LoadData.sql`.

   Sample data is loaded into the Relate database.
7. Open and execute the script `05OrgID.sql`.

   Organization information is set in the Relate database.
8. Open and execute the script `06InsertReports.sql`.

   Reports are created for Relate.

Oracle

Look for errors in the log files after running each of the following scripts. If any errors occur, contact your product representative for assistance.

The name of the log file is similar to the name of the script, though without a number at the beginning, and with a file extension of `.log`. For example, the log file for `01CreateTBS.sql` is `CreateTBS.log`.

1. Locate the database creation files. These files are located in the `oracle` directory within the directory specified in step 2 of the "Database Installation" on page 15 procedure.
2. Open the file `01CreateTBS.sql` using your database interface software (e.g. sqlplus).
3. Execute the script `01CreateTBS.sql`.

   The tablespaces are created.
4. Open and execute the script `02CreateUsers.sql`.

   Usernames and passwords for the database are created.
5. Open and execute the script `03CreateRELATE.sql`.

   Database tables are created.
6. Open and execute the script `04LoadQRTZRS.sql`.

   Quartz locks are set.
7. Open and execute the script `05OrgID.sql`.

   Organization information is set in the Relate database.

The script `05OrgID.sql` does not create a log file.

8. Open and execute the script `06InsertReports.sql`.

   Reports are created for Relate.

The script `06InsertReports.sql` does not create a log file.

9. As the sysdba user, run the following command in Oracle:

```
GRANT EXECUTE on sys.dbms_crypto to public;
```

Upgrade the Database

If you selected a New Installation option in the Relate Database Setup Wizard, do NOT perform the procedure in this section. Go to "Create the New Database" on page 33, or proceed to "Relate Installation" on page 36 if you have already created the database.

In this section you will run database scripts that will upgrade the existing database.

SQL Server

Look for errors after running each of the following scripts. If any errors occur, contact your product representative for assistance.

1. Locate the database creation files. These files are located in the `sqlserver` directory within the directory specified in step 2 of the "Database Installation" on page 15 procedure.
2. Open the file `db-updates.sql` using your database interface software (e.g. SQL Server Management Studio).
3. Execute the script `db-updates.sql`.

   The database schema is updated for Relate 11.1.

Oracle

- *Look for errors after running each of the following scripts. If any errors occur, contact your product representative for assistance.*
- *Upgrades on Oracle will only succeed if the current version of Relate was installed by the 11.0 installer.*
- The upgrade scripts should be run by Oracle's Relate user.

1. Locate the database creation files. These files are located in the `oracle` directory within the directory specified in step 2 of the "Database Installation" on page 15 procedure.
2. Open the file `db-updates.sql` using your database interface software (e.g. sqlplus).
3. Execute the script `db-updates.sql`.

   The database schema is updated for Relate 11.1.

Relate Installation

This procedure will install the Relate software.

> *A SQL Server database server should not be used with a Linux application server. This configuration is not supported and may result in unpredictable behavior by Relate.*

1. Insert the Application Installation CD into the CD-ROM drive.

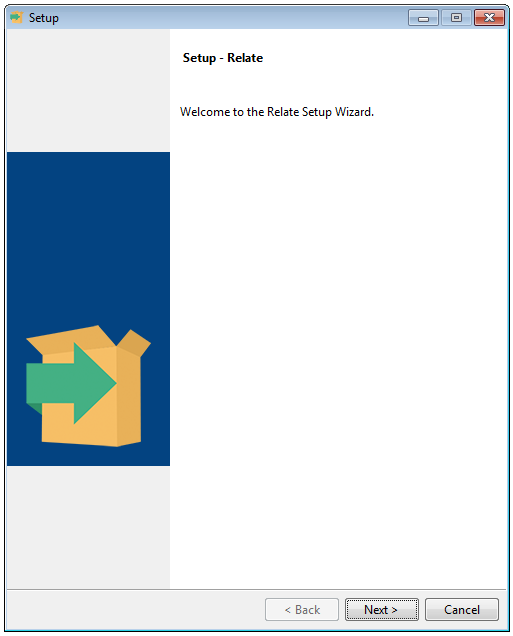


Figure 2-26: Welcome Screen

If the Installer does not automatically start:

a. Open a browser and navigate to the CD drive.

b. Run the installation program for your operating system:

- **Windows** - Double-click the `Relate-11.1.00.xx.exe` file.
- **Linux** - Double-click the `Relate-11.1.00.xx.run` file.

c. Click **Next** to move to the next step.

2. If necessary, change the Installation Directory from the default. If you are performing an upgrade, this directory must be set to the path in which Relate is currently installed.

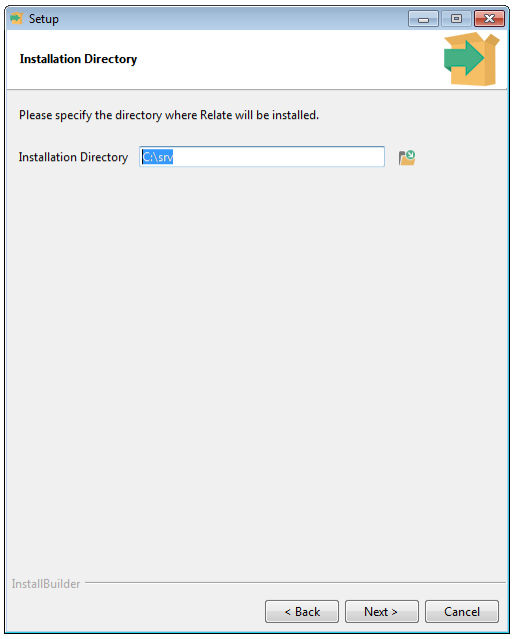


Figure 2-27: Installation Directory

If this is an upgrade, the path should be set to the directory where Relate is currently installed.

If you change the installation directory, the path cannot contain any spaces. If the path contains spaces, the installation will fail.

Click **Next** to continue:

- ❑ If Relate is already installed on your system, continue with the next step.
- ❑ If you are installing Relate on a Windows system, and Relate is not installed on your system, continue with step 4.
- ❑ If you are installing Relate on a Linux system, and Relate is not installed on your system, continue with step 6.

3. If the Installer detects another instance of Relate, the screen shown below will be displayed.

If this screen does not appear, and you are not performing an upgrade, continue with step 4 (Windows) or step 6 (Linux).

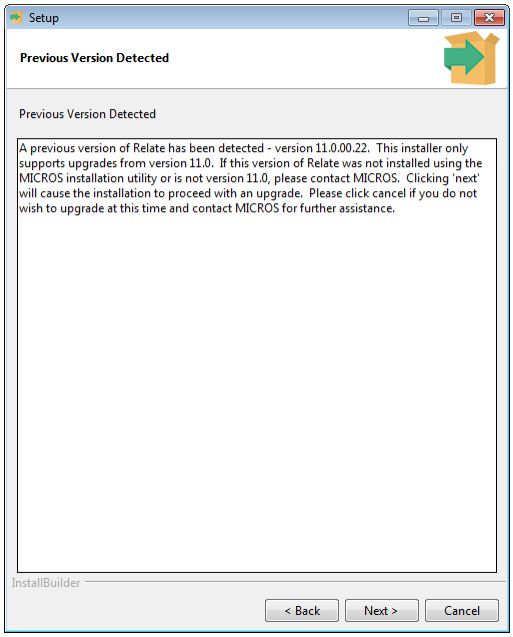


Figure 2-28: Previous Version Detected

a. If the previous version is Relate 11.0 and you wish to continue, click **Next**. The Installer will do the following:

- Stop Relate if it is currently running (Windows Only).
- Delete the services (Windows Only).
- Rename the existing `<install_directory>` to `<install_directory>.preupg`.
- Continue with step 4.

b. If the previous version is not Relate 11.0:

1) Contact your project manager for assistance.

2) Click **Cancel** and then **OK** when asked if you want to stop.

c. If you do not wish to continue, click **Cancel**, then click **OK** when asked if you want to stop.

4. Enter the following information (Windows Only):

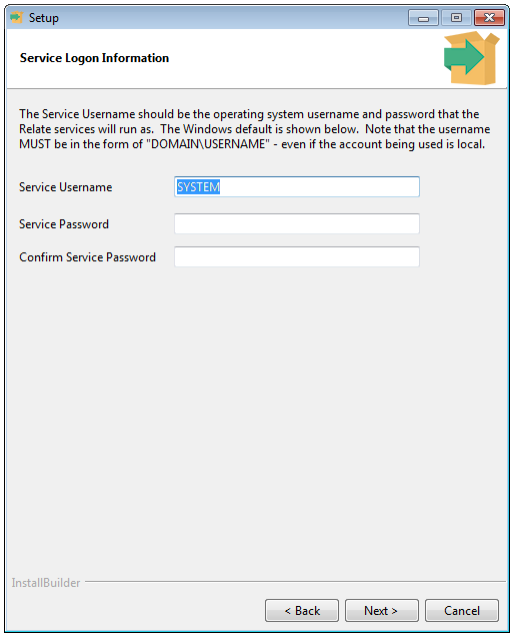


Figure 2-29: Service Username and Password

a. **Service Username** - Enter the Windows Username under which the Relate service will run (Administrator, SYSTEM (recommended), Root, etc.).

The user name must be in the form `DOMAIN\USERNAME`.

If the account is local, the `DOMAIN` portion is the name of the local machine.

b. **Service Password** - Enter the Password for the Username in the Service Password text box.

c. **Confirm Service Password** - Enter the Password a second time in the Confirm Service Password text box.

If this does not match the password already entered, a dialog box is displayed with a warning. Click **OK** to return to the Service Logon Information screen.

d. Click **Next** to move to the next step:

- If this is a new installation, continue with the next step.
- If this is an upgrade installation, continue with step 10.

5. Enter the SSL configuration information:

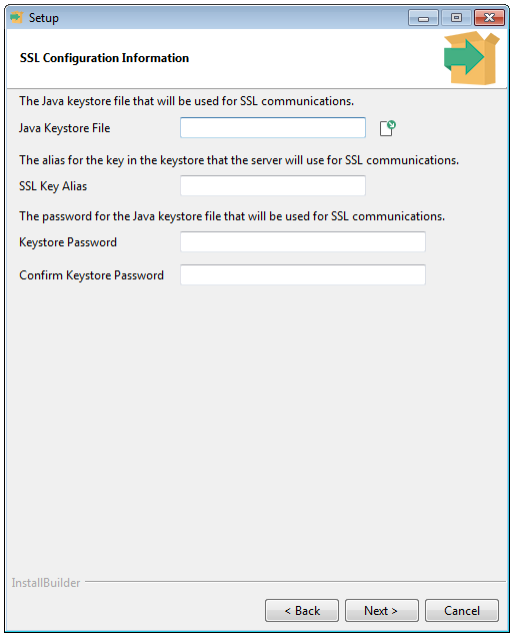


Figure 2-30: Service Logon Information

a. Enter the full path for the **Java Keystore File** (see "Create the SSL Certificate" on page 65 for more information).

If you place the keystore file with the filename `relate.keystore` in the same directory as the installer program, this field will be populated automatically. The installer will then place the keystore file in the `ssl` directory of the Installation Directory (see step 2).

b. Enter the **SSL Key Alias**. This is the alias used by Relate.

This will value will depend upon the configuration of your system.

In the line commands given in the procedure "Create the SSL Certificate" on page 65 in Appendix B: "Secure Sockets Layer (SSL)", the alias is `tomcat`.

c. Enter the **Keystore Password** used to access the keystore.

d. Re-enter the password in the **Confirm Keystore Password** file.

e. Click **Next** to continue with the next step.

6. Select the database you will be using. Click **Next** to move to the next step.

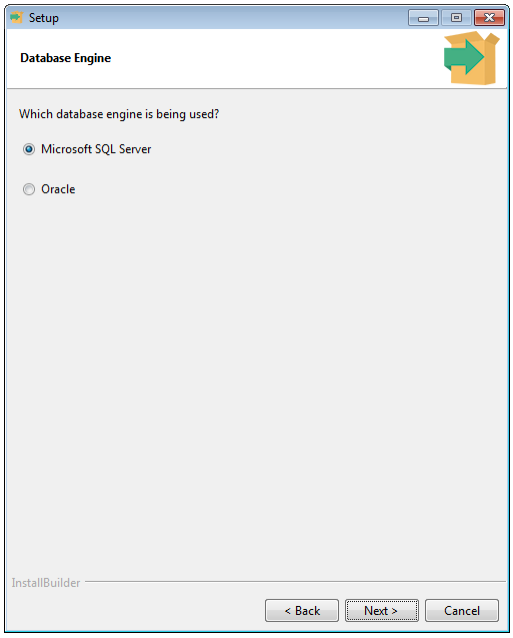


Figure 2-31: Database Engine

- If you selected **Oracle**, continue with the next step.
- If you selected **Microsoft SQL Server**, continue with step 8.

A SQL Server database server should not be used with a Linux application server. This configuration is not supported and may result in unpredictable behavior.

7. If you selected Oracle as your database, enter the database information:

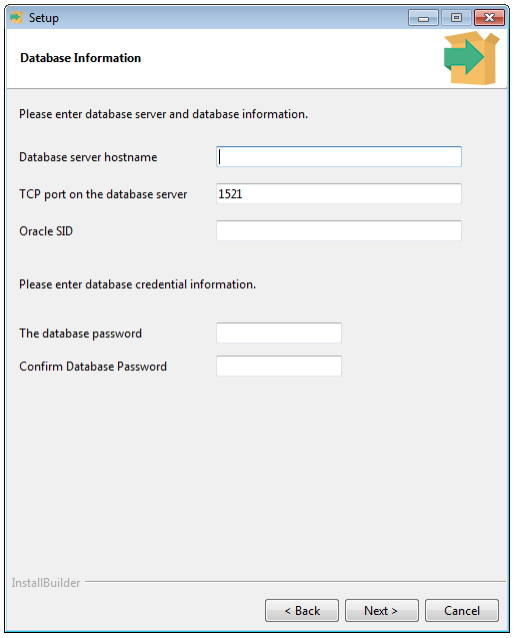


Figure 2-32: Database Information (Oracle)

a. **Database Server Hostname** - Name of the server.

b. **TCP Port on the Database Server** - This is typically "1521", but if you are going to use another port, enter the number here.

c. **Oracle SID** - The SID for Oracle.

d. **Database Password** - Used by Relate to connect to the `relate_user` database account.

e. **Confirm Password** - If this does not match the password already entered, a dialog box is displayed with a warning. Click **OK** to return to the Database Credentials screen.

When you are finished, click **Next** to continue with step 9.

8. If you selected Microsoft SQL Server as your database, enter the database information:

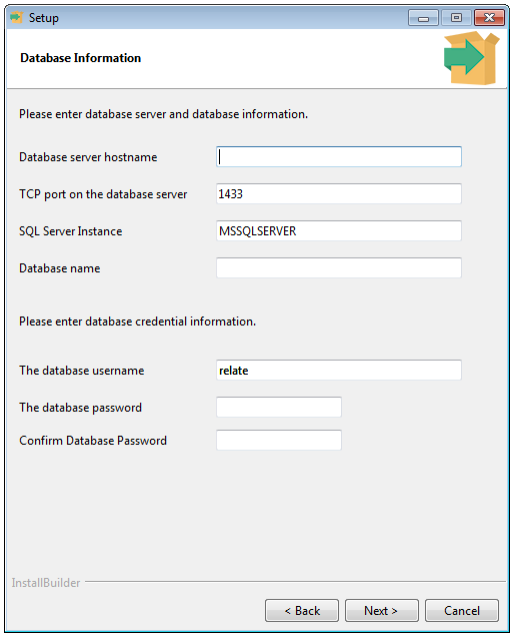


Figure 2-33: Database Information (SQL Server)

a. **Database Server Hostname** - Name of the server.

b. **TCP Port on Database Server** - This is typically "1433", but if you are going to use another port, enter the number here.

c. **SQL Server Instance** - SQL Server Instance to use. If necessary, leave this field blank.

d. **Database Name** - This must agree with the database name you used when installing the database.

e. **Database Username**- This will be used by Relate to connect to the Relate database.

f. **Database Password** - Used by Relate to connect to the Relate database.

g. **Confirm Password** - If this does not match the password already entered, a dialog box is displayed with a warning. Click **OK** to return to the Database Credentials screen.

When you are finished, click **Next** to continue with the next step.

9. Enter the Organization Information:

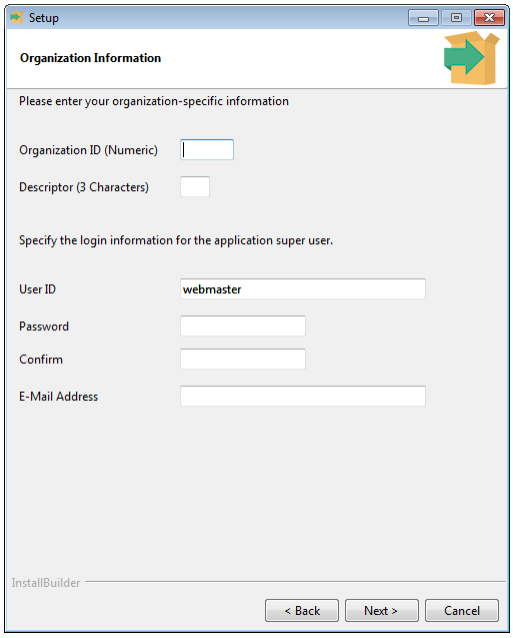


Figure 2-34: Organization Information

a. **Organization ID** - This is the identification number assigned to your organization. This must match the Organization ID you provided in the Database Installer.

b. **Descriptor** - This is the 3-Letter company code assigned to your organization. This must match the Company ID you provided in the Database Installer.

c. Enter the necessary information for the superuser. Click **Next** to move to the next step.

When Relate 11.1 runs for the first time, this will be the only user who can log into the system.

1) **User ID** - The username to use when logging into the system as the superuser.

2) **Password** - The password to use when logging into the system as the superuser.

3) **Confirm** - Confirm the password for the superuser.

If this does not match the password already entered, a dialog box is displayed with a warning. Click **OK** to return to the Relate Super User Credentials screen.

4) **E-Mail Address** - The e-mail address to which Relate will send all messages to be delivered to the superuser.

5) Click **Next** to move to the next step.

10. Configure Relate services. Click **Next** to continue with the next step.

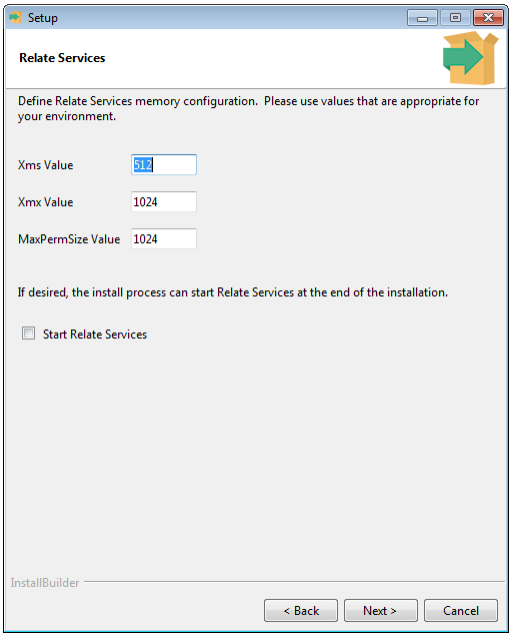


Figure 2-35: Relate Services Memory Allocation (Windows and Linux New Installation)

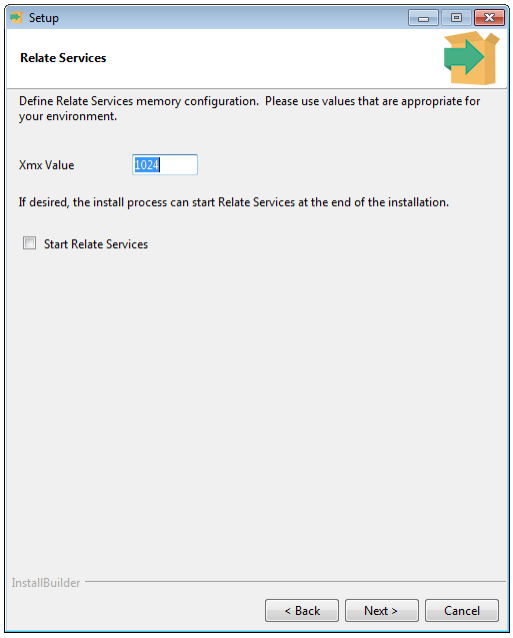


Figure 2-36: Relate Services Memory Allocation (Linux Upgrade)

Speak with your product representative to determine the proper values to enter in these fields.

a. If necessary, update the memory allocations for Relate services.

b. If necessary, click to enter a checkmark (☑) in the Start Relate Services checkbox to start Relate services when installation is finished.

When you are finished, click **Next** to continue:

- ❑ **New Installation** - Continue with step 12.
- ❑ **Upgrade Installation** - Continue with the next step.

11. If you are performing an upgrade installation, confirm the upgrade by clicking **Next** to continue with the next step.

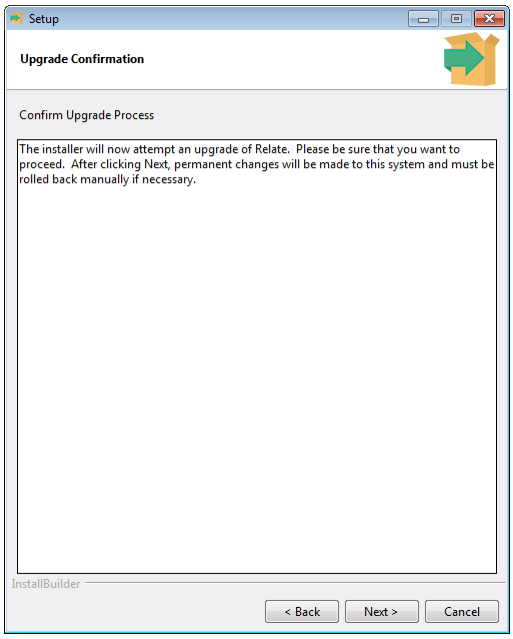


Figure 2-37: Upgrade Confirmation

12. Click **Next** to start the installation process. This process will install the files necessary to run Relate and configure the system settings.

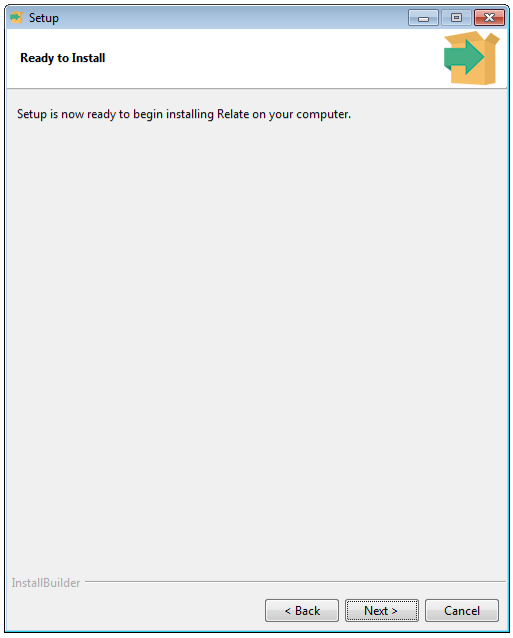


Figure 2-38: Ready to Install

13. After the installation is complete, if you selected the option to start services in step 10, the Installer alerts you that the services will take some time to start. Click **Next** to complete the Relate installation.

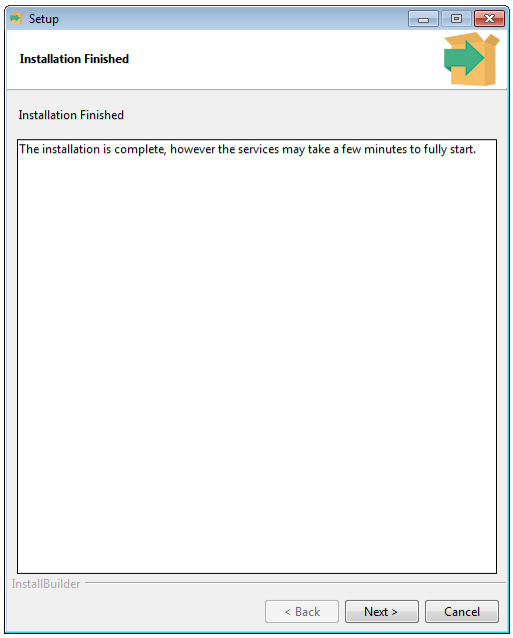


Figure 2-39: Installation Finished

14. Click **Finish** to complete the Relate setup.

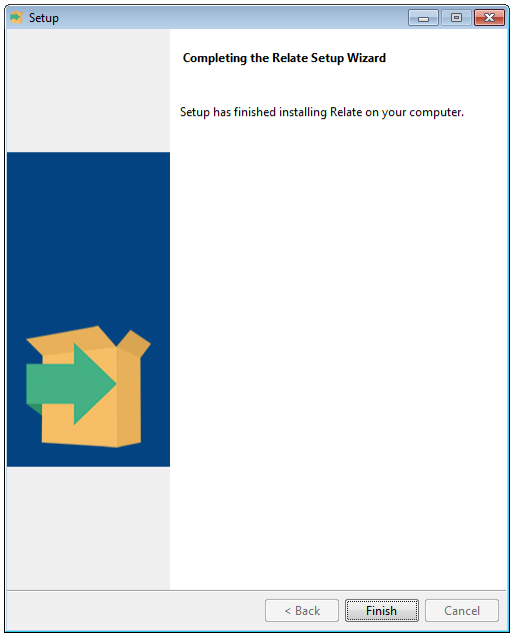


Figure 2-40: Complete Relate Setup Wizard

Initial Configuration

Refer to Chapter 3, “Initial Configuration” on page 49 for instructions on the initial configuration of Relate.

CHAPTER 3

Initial Configuration

Overview

This procedure describes the initial configuration of Relate following installation.

If Relate 11.1 has not been installed, configuration cannot be performed. Perform the installation procedure in *Chapter 2, "Installation" on page 13* *before performing the actions in this chapter.*

The following tasks need to be performed in order to configure Relate:

- "Start Relate Services" on page 50
- "Log In" on page 51
- "Perform Initial Configuration" on page 52

Segment Management Query Templates

Query templates for Segment Management are now in a different location and use a different format than previous versions of Relate. If you are upgrading from Relate 11.0 and you have customized Segment Management query templates, these customizations must be migrated properly to be available in Relate 11.1.

Speak with your product representative before attempting to move these configurations to Relate 11.1 from a previous version.

The values in the current query template file(s) must be configured in the file(s)

```
\srv\relate-services-deploy\apache-tomcat\webapps\relateui#ORG\
    qry_resource_XX.js
```

where **ORG** is the Organization ID and **XX** is the two-letter ISO language code (upper-case) for the properties being set.

- *Each Organization on the server has a separate directory for these configurations. The universal configuration used in earlier versions of Relate must now be configured for each Organization.*
- *After configuring the new file(s), back up the new file(s) in a safe location.* **These directories will be overwritten if you redeploy the .WAR files.**

Start Relate Services

If Relate Services is not running, start the application or service. See Appendix A: "Start/ Stop Relate Services" on page 61 for more information.

Log In

Use the following procedure to log into the Relate application:

1. Use a Web Browser to navigate to the URL provided at the time of installation (similar to: http://<hostname>:<port_number>/relateui/<ORG_ID>/).

   The Relate login page is displayed.

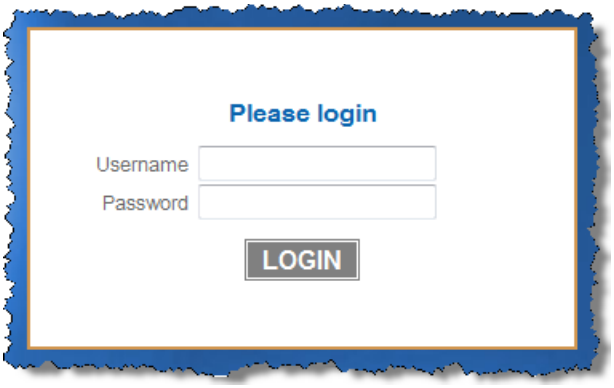


Figure 3-1: Relate Login

2. Enter your username in the **Username** field.
3. Enter password in the **Password** field.
4. Click the **Login** button, or press the [Enter] key.

   The Relate main page opens.

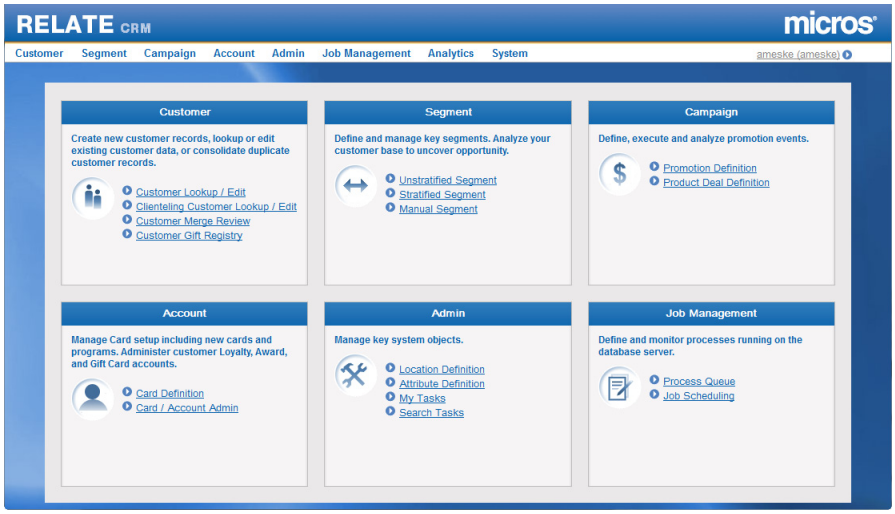


Figure 3-2: Relate Main Page

Perform Initial Configuration

Initial configuration will need to be performed before Relate is ready for use. This configuration includes such requirements as adding organizations, adding and configuring users, creating Role Groups, and making additional configuration changes to Relate. These configuration changes are described in the *Relate Configuration Guide*.

See also: The *Relate Configuration Guide* for a full description of configuration procedures and the configuration options available.

Import Users and User Configurations (New Installation)

If the Relate installation is a new installation, User data may be imported through comma-separated values (CSV) files. These files can be created programmatically from an existing database, allowing Users to be easily moved to Relate.

To import Users into Relate, do the following:

1. Import Franchisees into Relate (if Relate is configured to use Franchisees):
   a. Create the Franchisees CSV file:

      The Create Franchisees CSV file will have the following line format for each new Franchisee:

      ```
      FRANCHISEE_ORG_NAME,FRANCHISEE_ORG_DESCRIPTION
      ```

      where:

      - `FRANCHISEE_ORG_NAME` - Is the name of the Franchisee.
      - `FRANCHISEE_ORG_DESCRIPTION` - Is a description of the Franchisee.

      The first line in a Create Franchisees CSV file must define the Location ID for a user. The next lines will then be used to add as many Franchisee IDs as desired.

   b. Import the Franchisee CSV file. See "Import New Franchisee CSV File" on page 54 for a description of the procedure.
2. Import Users into Relate:
   a. Create the Users CSV file.

      The Users CSV file will have the following line format for each new User:

      ```
      USR_EMAIL,USR_LNAME,USR_FNAME,USR_LANGCODE,USR_ID,USER_LOCATION_ID,
      COUNTRY_CODE
      ```

      where:

- USR_EMAIL - User email address.
- USR_LNAME - User last name.
- USR_FNAME - User first name.
- USR_LANGCODE - ISO language code for the User's default language.
- USR_ID - Unique ID for the User.
- USER_LOCATION_ID - Unique ID for the User's Location.
- COUNTRY_CODE - ISO country code for the User's country.

b. Import the User CSV file. See "Import User CSV File" on page 56.

3. Import Roles into Relate:

a. Create the Roles CSV file.

The Roles CSV file will have the following line format for each Role assigned to a User:

```
ROL_EMAIL,ROL_ROLENAME,ROL_USR_ID
```

where:

- ROL_EMAIL - Email address of the User being assigned the Role.
- ROL_ROLENAME - Name of the Role.
- ROL_USR_ID - ID of the User being assigned the Role.

The Roles Relate_SystemAdmin and Relate_UserAdmin cannot be assigned to a User through the import process.

b. Import the Roles CSV. See "Import Roles CSV File" on page 58.

4. Import the Franchisee Assignments in Relate:

a. Create the Franchisee Assignment CSV file.

The Franchisee Assignment CSV file will have the following line format for each Franchisee assignment:

```
FRANCHISEE_EMAIL,FRANCHISE_ORGNAME,FRANCHISE_LOCFLAG,
FRANCHISEE_USR_ID
```

where:

- FRANCHISEE_EMAIL - Email address of the User being assigned to the Franchisee.
- FRANCHISE_ORGNAME - Name of the Franchisee, or the ID of the Location to which the User is assigned. The value in this field depends upon the value of the FRANCHISE_LOCFLAG.
- FRANCHISE_LOCFLAG - This flag indicates the information included in the FRANCHISE_ORGNAME field.

  TRUE - The FRANCHISE_ORGNAME contains the ID of the Location to which the User will be assigned.

FALSE - The FRANCHISE_ORGNAME contains the name of the Franchisee to which the User will be assigned.

- FRANCHISEE_USR_ID - ID of the User being assigned to the Franchisee.

5. Import the Franchisee Assignment CSV file. See "Import Franchisee Assignment CSV File" on page 59.

Import New Franchisee CSV File

Only perform this procedure if Franchises are enabled in Relate.

Use the following procedure to import a Franchisee comma-separated values (CSV) file:

Users must be assigned the Relate_SystemAdmin role or the Relate_UserAdmin role to perform this procedure.

1. In the **System** menu for Relate, click **Franchisees**.

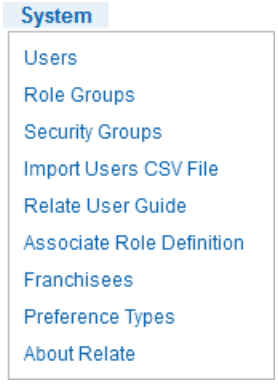


Figure 3-3: System Menu

The Franchisees page opens.

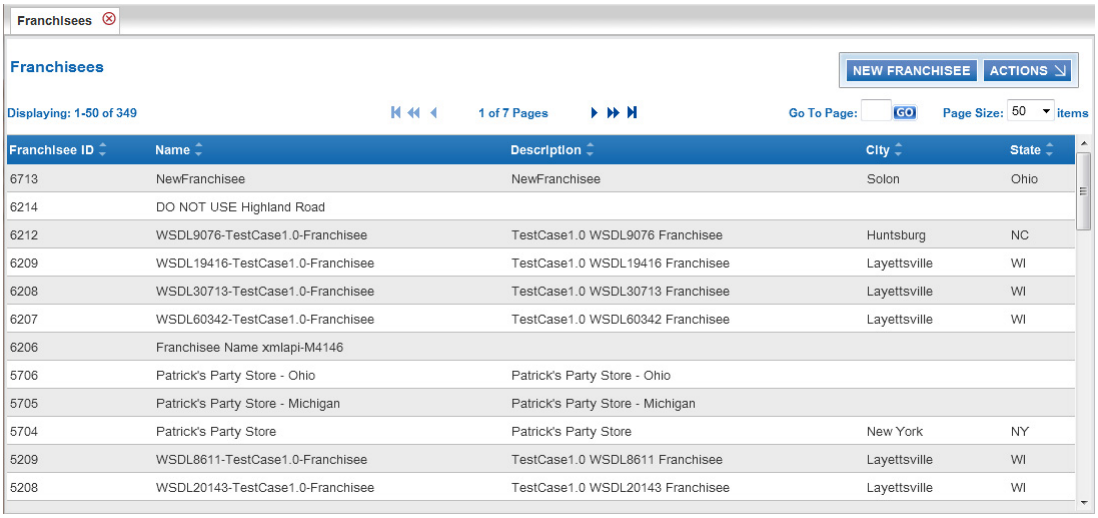


Figure 3-4: Franchisees Page

2. In the ACTIONS menu, click **IMPORT FRANCHISEE CSV FILE**.

Figure 3-5: Import Franchisee CSV File

3. A Choose a CSV File window opens.

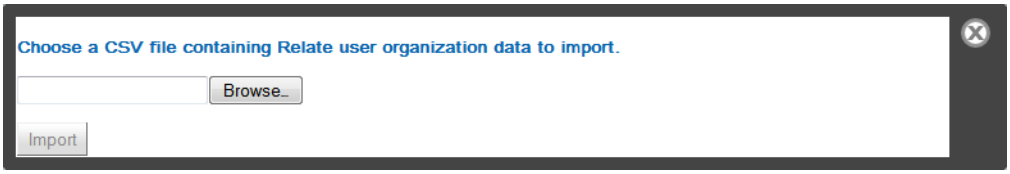


Figure 3-6: Choose a CSV File Window

4. Click the **Browse...** button.

The file selection process for an upload file begins. The procedure for selecting a file depend upon the operating system and browser being used. See the documentation for the operating system and browser for more information about selecting a file for upload.

5. Click the **Import** button.

The data is imported into Relate. When the data has been imported, confirmation of the successful import is displayed.

Figure 3-7: Import Success Confirmation

6. Click the **X** ( ) to close the window.

Import User CSV File

Use the following procedure to import a User-related comma-separated values (CSV) file:

> *You must be assigned the Relate_SystemAdmin role or the Relate_UserAdmin role to perform this procedure.*

1. In the **System** menu for Relate, click **Import Users CSV File**.

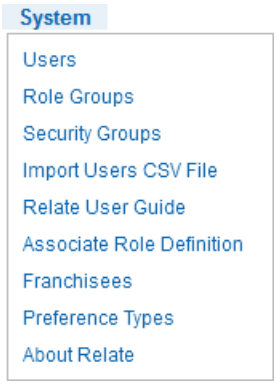


Figure 3-8: System Menu

The Import User CSV File page opens.

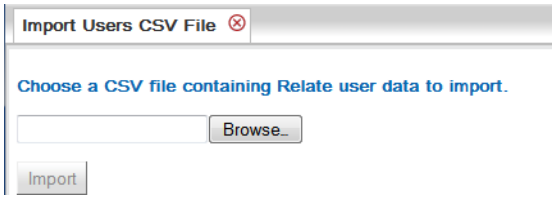


Figure 3-9: Import Users CSV File Page

2. Click the **Browse...** button.

   The file selection process for an upload file begins. The procedure for selecting a file depend upon the operating system and browser being used. See the documentation for the operating system and browser for more information about selecting a file for upload.

3. After selecting a file, click the **Import** button.

   The data is imported into Relate. When the data has been imported, confirmation of the successful import is displayed.

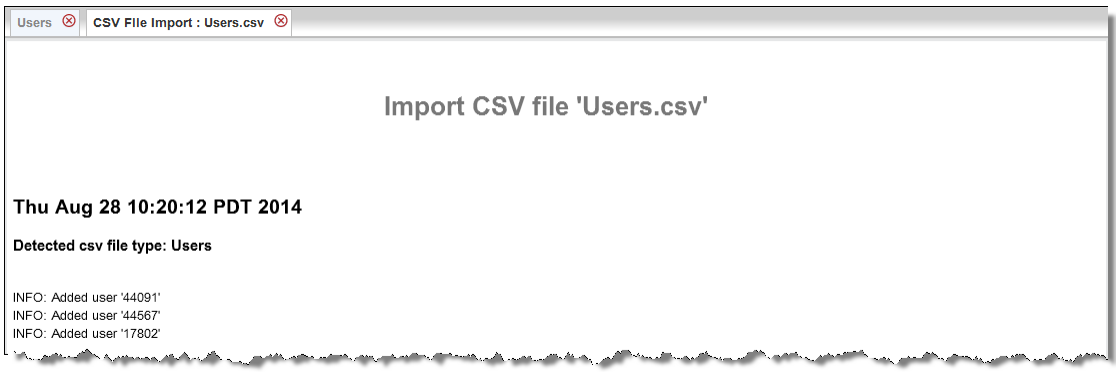


Figure 3-10: Import Success Confirmation

4. Click the red **X** (⊗) to close the tab.

Import Roles CSV File

Use the following procedure to import the user roles in a comma-separated values (CSV) file:

> *You must be assigned the Relate_SystemAdmin role or the Relate_UserAdmin role to perform this procedure.*

1. In the **System** menu for Relate, click **Import Users CSV File**.

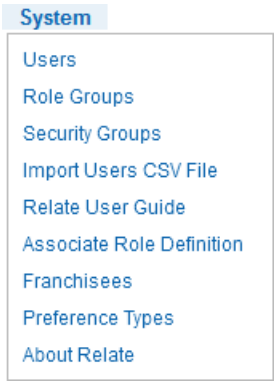


Figure 3-11: System Menu

The Import User CSV File page opens.

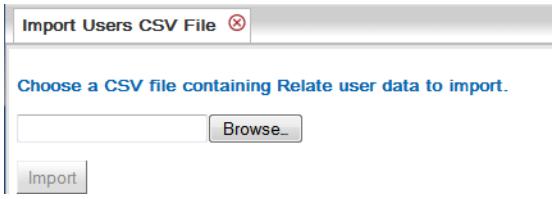


Figure 3-12: Import Users CSV File Page

2. Click the **Browse...** button.

   The file selection process for an upload file begins. The procedure for selecting a file depend upon the operating system and browser being used. See the documentation for the operating system and browser for more information about selecting a file for upload.

3. After selecting a file, click the **Import** button.

The data is imported into Relate. When the data has been imported, confirmation of the successful import is displayed.

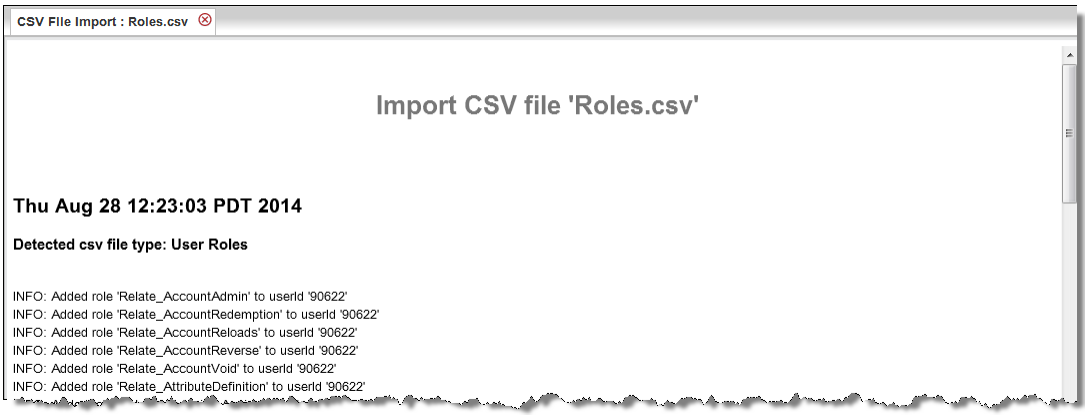


Figure 3-13: Import Success Confirmation

4. Click the red **X** (⊗) to close the tab.

Import Franchisee Assignment CSV File

Use the following procedure to import the franchisee assignments in a comma-separated values (CSV) file:

> *You must be assigned the Relate_SystemAdmin role or the Relate_UserAdmin role to perform this procedure.*

1. In the **System** menu for Relate, click **Import Users CSV File**.

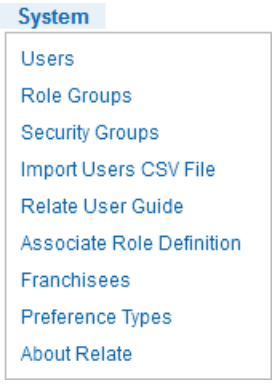


Figure 3-14: System Menu

The Import User CSV File page opens.

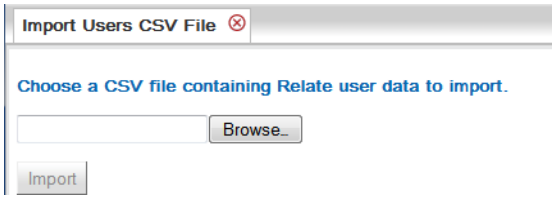


Figure 3-15: Import Users CSV File Page

2. Click the **Browse...** button.

   The file selection process for an upload file begins. The procedure for selecting a file depend upon the operating system and browser being used. See the documentation for the operating system and browser for more information about selecting a file for upload.

3. After selecting a file, click the **Import** button.

   The data is imported into Relate. When the data has been imported, confirmation of the successful import is displayed.

Figure 3-16: Import Success Confirmation

4. Click the red **X** (⊗) to close the tab.

APPENDIX A

Start/Stop Relate Services

Overview

This chapter describes the procedures for starting and stopping Relate Services.

How you start and stop Relate Services depends on whether you are running it as a Windows service, as a Windows non-service application, or as a Linux application.

Windows

Service

Start

Use the following procedure to start Relate Services where Relate is a Windows service:

1. In the Start menu, open the **Control Panel**.
2. If Control Panel is organized by category, click to open **System and Security**.
3. Open **Administrative Tools**.
4. Double-click **Services** to open the Services window.
5. Click to select the **RelateServices** service.
6. Click the **Start Service** button ( ).

or

1. Open a command prompt.
2. Run the following command to start Relate Services:

```
net start relateservices
```

3. Wait 5-15 minutes to give the processes time to fully start.

Stop

Use the following procedure to stop Relate Services where Relate is a Windows service:

1. In the Start menu, open the **Control Panel**.
2. If Control Panel is organized by category, click to open **System and Security**.
3. Open **Administrative Tools**.
4. Double-click **Services** to open the Services window.
5. Click to select the **RelateServices** service.
6. Click **Stop Service** button ( ).
7. Wait 1-5 minutes to give the process time to fully shut down.

or

1. Open a command prompt.
2. Run the following command to stop Relate Services:

```
net stop relateservices
```

3. Wait 1-5 minutes to give the process time to fully shut down.

Non-Service

Start

Use the following procedure to start Relate Services where Relate is not a Windows service:

1. Open a command prompt.
2. Change the working directory to Tomcat's `bin` directory.

```
cd \srv\relate-services-deploy\apache-tomcat\bin\
```

3. Start Relate Services by running:

```
.\startup.bat
```

4. Wait 5-15 minutes to give the processes time to fully start.

Stop

Use the following procedure to stop Relate Services where Relate is not a Windows service:

1. Open a command prompt.
2. Change the working directory to Tomcat's `bin` directory.

```
cd \srv\relate-services-deploy\apache-tomcat\bin\
```

3. Stop Relate Services by running:

```
.\shutdown.bat
```

4. Wait 1-5 minutes to give the process time to fully shut down.

Linux

Start

Use the following procedure to start Relate Services:

1. Open a command prompt.
2. Change the working directory to Tomcat's `bin` directory.

   ```
   cd /srv/relate-services-deploy/apache-tomcat/bin/
   ```

3. Start Relate Services by running:

   ```
   ./startup.sh
   ```

4. Wait 5-15 minutes to give the processes time to fully start.

Stop

Use the following procedure to stop Relate Services:

1. Open a command prompt.
2. Change the working directory to Tomcat's `bin` directory.

   ```
   cd /srv/relate-services-deploy/apache-tomcat/bin/
   ```

3. Shut down Relate Services by running:

   ```
   ./shutdown.sh
   ```

4. Wait 1-5 minutes to give the processes time to fully shut down.

APPENDIX B

Secure Sockets Layer (SSL)

Overview

Secure Sockets Layer (SSL) is a protocol that uses public key encryption to protect sensitive information in communications over the internet.

This chapter provides instructions for enabling SSL for use with Relate. The person(s) performing this procedure should be familiar with internet protocols, SSL, and how SSL is used on the internet.

Relate supports alternate ports for SSL and non-SSL connections.

Create the SSL Certificate

The following procedure to create an SSL certificate will create a file named `relate.keystore` in the directory where the commands are

To create an SSL certificate for Relate in Windows, do the following:

1. Open a command prompt.
2. Change to the directory where the keystore file should be located.

It is recommended that you locate the file in the same directory where the Relate installer is/will be located. See step 5 on page 40 of the Relate Installation procedure.

3. Create a new, self-signed certificate:

You can override the default keystore location by adding a `-keystore` parameter to the command. If you do change the default location, make sure it agrees with the configuration setting.

   a. Run the following command:

```
keytool -genkey -alias tomcat -keyalg RSA -dname "cn=[hostname]"
    -validity [duration]
```

   where:

   - `[hostname]` is the system name (`localhost` may not work on some systems).
   - `[duration]` is the number of days for which the certificate will be valid.

The command-line options are the following:

- `genkey` - Tells the keytool application to generate a new public/ private key pair.
- `alias` - The name used to refer to the Relate Services keys.
- `keyalg` - Specifies the algorithm to use when generating the keys.
- `dname` - Distinguished name.
- `validity` - Specifies the number of days for which the key is valid. *The key being created will only last for 90 days unless you use the "-validity xxx" switch to extend this length of time. At the end of this period, the key will need to be renewed.*

   b. When prompted, enter a password for the keystore. You may use any password of your choosing.

c. Press **Enter** to use the same password for the alias.

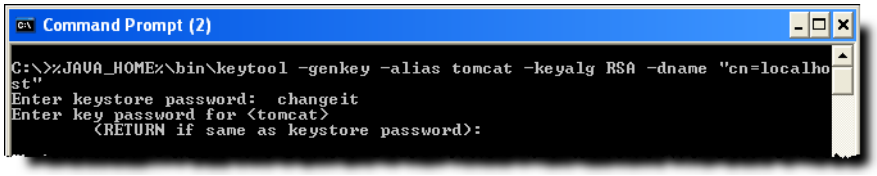


Figure B-1: Create Keystore (Windows)

4. Extract the newly created self-signed certificate from the keystore to a local file:

a. Run the command to export the certificate:

Windows

```
keytool -export -alias tomcat -file [path]\relate.keystore
```

Linux

```
keytool -export -alias tomcat -file [path]/relate.keystore
```

where:

- `[path]` is the full destination path for the certificate file.

- It is recommended that you put the `relate.keystore` file in the same directory as the Relate Installer. This will allow the installer to automatically locate the file (see step 5 on page 40 of the Relate Installation procedure).
- You can put this file anywhere you would like by specifying the appropriate path. It is important to remember the file location and the file name.

b. When prompted for the keystore password, enter the password you entered in the previous step.

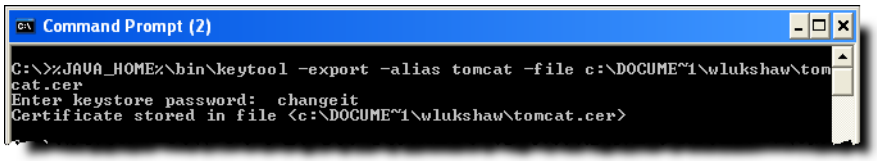


Figure B-2: Export Certificate (Windows)

5. Import the certificate into the Java `cacerts` file:

a. Run the command to import the certificate:

Windows

```
keytool -import -alias relate -file [path]\relate.keystore
    -keystore [java_path]/cacerts
```

Linux

```
keytool -import -alias relate -file [path]/relate.keystore
    -keystore [java_path]/cacerts
```

where:

- `[path]` is the full destination path for the certificate file.
- `[java_path]` is the full destination path for the Java `cacerts` file.

b. Enter the keystore password when prompted.

c. Press the [y] key, then press the [Enter] key to confirm that you trust the certificate.

The certificate is now installed.

Enable SSL for Relate

Use the following procedure to enable SSL for Relate Services:

1. Create the SSL Certificate.

2. Configure the Relate Services SSL Keystore File, Relate Services SSL Password, and Relate Services SSL Connector Port settings in Conflate:

a. Open a file browser and navigate to `c:\srv\conflate` (Windows) or `/srv/conflate` (Linux).

b. Double-click the `conflate.jar` file.

The Conflate Main window opens.

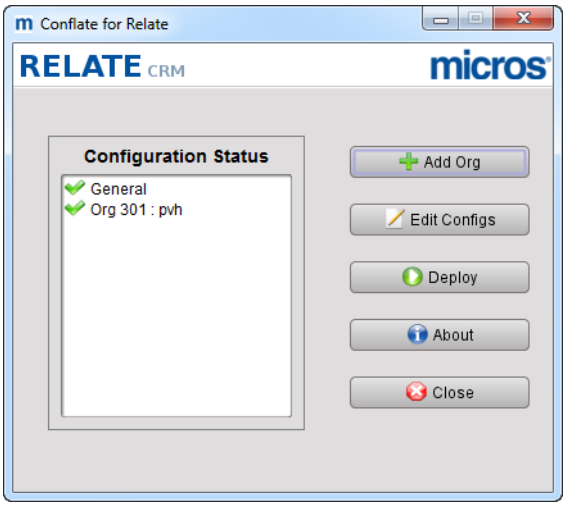


Figure B-3: Conflate Main Window

c. Click **Edit Configs**.

The Edit Configs window opens.

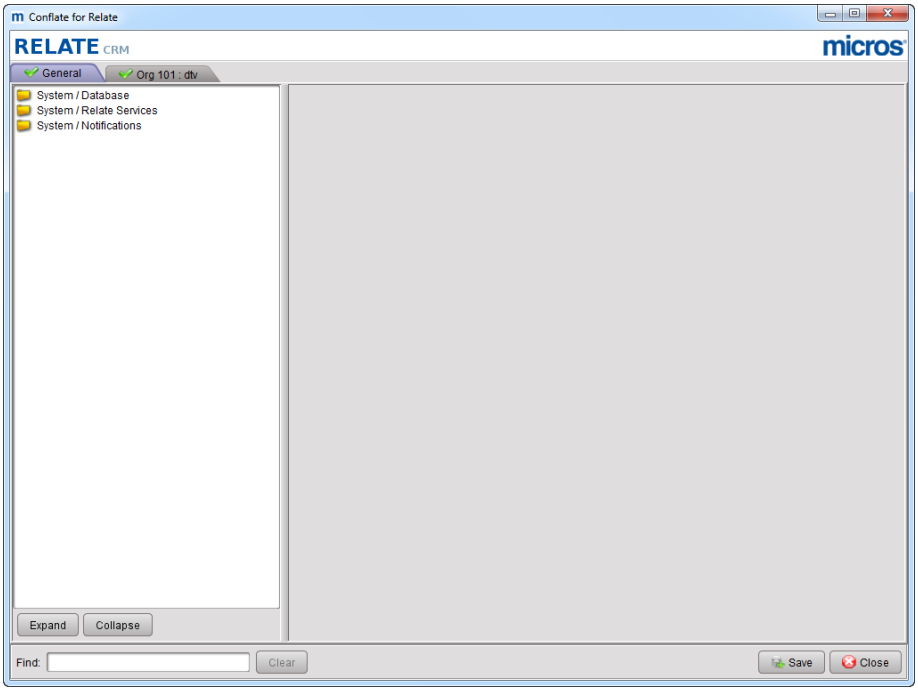


Figure B-4: Edit Configuration Window

d. Make sure the "General" tab is selected.

e. Open the System/Relate Services category and select Relate Services SSL KeyStore File.

f. Type in the File URI for, or use the browser button to navigate to, the directory where the keystore file is located.

If you choose to type in the File URI; it must start with "File:/", each space in the path must be replaced with "%20", and backslashes cannot be used.

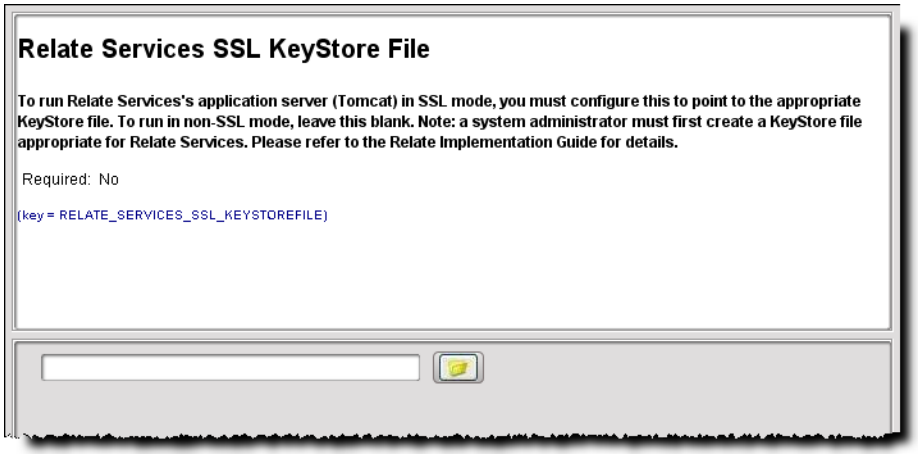


Figure B-5: Relate Services SSL Keystore File Setting

g. If you choose to use a password for your Keystore file other than the default ("changeit"), perform the following steps:

Figure B-6: Relate Services SSL Keystore Password Setting

1) Select Relate Services SSL Keystore Password.

2) Type in the password.

h. If you choose to use a network port for SSL web service requests other than the default (8443), do the following:

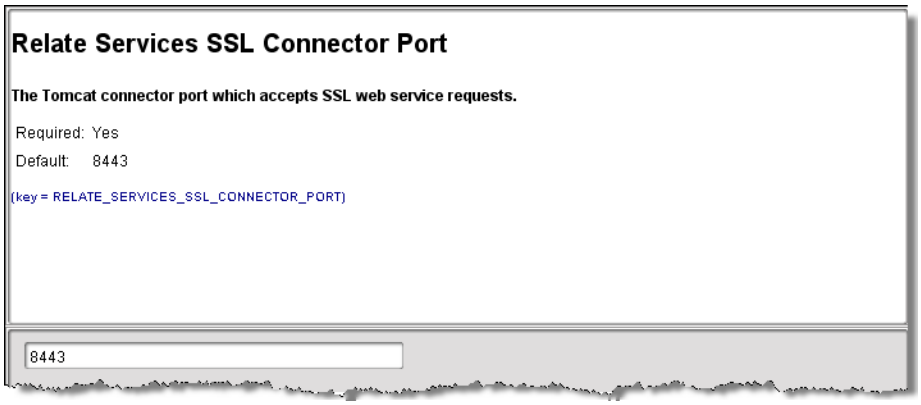


Figure B-7: Relate Services SSL Connector Port Setting

1) Select Relate Services SSL Connector Port.

2) Enter the new network port number.

i. Click **Save**.

j. Click **Close**.

k. Click **Deploy**.

Click **Yes** when asked "Configure Relate with the current settings?".

l. Click **Close** to close the Conflate Main window.

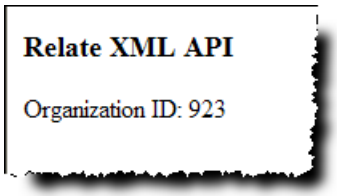
3. Restart Relate Services (see Appendix A: "Start/Stop Relate Services" on page 61).

4. Verify the Relate Services key:

> *Depending on the browser you use, the message you receive may differ from the ones cited below.*

a. Open a browser and go to the following address: `https://localhost:NNNN/xmlapi/xxx` where "NNNN" is the Relate Services SSL connector port number (**[DEFAULT]** 8443) and "xxx" is 3-character company code used when installing Relate. You should be notified that there is a problem with the certificate (Internet Explorer) or the certificate is from an unknown authority (FireFox).

b. Continue to the website (Internet Explorer) or accept the certificate (FireFox). You organization's ID Number should be displayed (see right).



c. Close the browser.

APPENDIX C

Revision History

RELATE VERSION	DATE	DESCRIPTION OF CHANGE
11.1	Oct 2014	In the "Installation" chapter, "Relate Installation" section, removed Licensed Feature Selection and License Key Entry steps.
11.0	Aug 2014	In the "Installation" chapter, changed the screenshots to reflect the new design in the installer windows. In the "Installation" chapter, "Relate Installation" section, added Licensed Feature Selection and License Key Entry steps. In the "Installation" chapter, changed the "Relate Installation" steps and ordering to reflect reorganization of the installation procedure. In "Initial Configuration" chapter, added Franchisees, removed User Organizations. In the "Initial Configuration" chapter, added the franchisees CSV import file, updated the format of the users CSV import file, and added the franchise assignment CSV file. Removed the user organizations CSV import file, and removed the user organizations assignment CSV file.
10.8 Doc Ver 5	May 2014	In the Secure Sockets Layer (SSL) appendix, added missing information describing how to import the generated SSL certificate into Java.
10.8 Doc Ver 4	Feb 2014	In the Secure Sockets Layer (SSL) appendix, corrected description of the `-dname` command line option to read "Distinguished name".

RELATE VERSION	DATE	DESCRIPTION OF CHANGE
10.8 Doc Ver 3	Jan 2014	Removed OpenSSL installation information.
10.8 Doc Ver 2	Jan 2014	In the Secure Sockets Layer (SSL) appendix, corrected broken link and removed incorrect information.
10.8	Jan 2014	In the "Installation" chapter, added SSL Configuration step to the "Relate Installation" section. Changed the name of the "Enable Secure Sockets Layer (SSL)" chapter to "Secure Sockets Layer (SSL)". In the chapter "Secure Sockets Layer (SSL)", split the procedure "Enabling SSL for Relate" into "Create the SSL Certificate" and "Enable SSL for Relate".
10.5	Sept 2013	In the "Installation" chapter, "Database Installation" section, removed all XBR steps from both the "SQL Server Installation" and "Oracle Installation" procedures. In the "Installation" chapter, "Create Database" section, removed the `05CreateXBRADMIN.sql` and `06LoadXBRADMIN.sql` files from the "Oracle" database creation procedure, and changed the numbers for the Org ID and Insert Reports files. Updates to installation screenshots.
10.0	May 2013	In the "Introduction" chapter, updated Java installation procedure to reflect upgrade to Java version 1.7. In the "Installation" chapter, updated images to match installer. Separated information about enabling SSL into the "Enable Secure Sockets Layer (SSL)". General cleanup and proofreading.
9.7	Sep 2012	In "Import Users (New Installation)" section of "Initial Configuration" chapter, added `COUNTRY_CODE` to fields in Users CSV file. General cleanup and proofreading.
9.6	Jun 2012	Removed section "Prepare Java JRE 1.6 for Relate (Windows)" from "Introduction" chapter. Updated screen captures throughout document. General cleanup and proofreading.

RELATE VERSION	DATE	DESCRIPTION OF CHANGE
9.5	Mar 2012	Installation Chapter: ■ Removed upgrade prerequisites from Relate 9.0. ■ Removed report installation script from database upgrade procedures. Initial Configuration Chapter: ■ Updated Log In procedure to a non-specific username and password. General cleanup and proofreading.
9.0	Sept 2011	Entire reworking of the Installation Guide, including the following information: Reorganized information in the chapters. Moved "Add New Organization" and "Users and Roles" chapters to the *Relate Configuration Guide*. Update document to new format. General cleanup and proofreading.