

**Oracle® Retail Customer  
Engagement Cloud Service  
(Relate)**

Installation Guide - Manual

Release 11.4

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## 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.*



*This guide and the accompanying installation CD are ONLY for situations where the Installer CDs cannot be used. This guide can be used for systems running Windows or Linux, and using an Oracle or SQL Server database.*

## Overview

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

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, “New Installation” on page 15](#) describes the installation and configuration of Relate Services and the database.
- [Chapter 3, “Upgrade” on page 29](#) describes how to upgrade from a previous version of Relate.
- [Chapter 4, “Initial Configuration” on page 43](#) provides instructions for configuring Relate after installation.
- [Appendix A: “Start/Stop Relate Services” on page 55](#) provides procedures for starting and stopping Relate Services in a Windows or Linux environment.

- [Appendix B: "Secure Sockets Layer \(SSL\)" on page 59](#) describes the method for enabling the Secure Sockets Layer.

## Who Should Use This Guide

This guide is intended for anyone responsible for the installation and configuration of, or the upgrade to, Relate 11.4, including Operations Technical Support and Customer Technical Support.

Anyone using this guide should have a working knowledge of either SQL Server or Oracle (depending on the database to be used by Relate), either the Windows or Linux operating system (depending upon the system on which Relate will be installed), and the network being used.

## 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 11.4 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, 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.

**Implementation Guide (Installer Version)** - The Installer version of the *Relate Implementation Guide* provides step-by-step instructions, requirements, and information for a typical installation, setup, and configuration of the Relate application using the Relate Installer.

## Supported Platforms

The following list describes the minimum requirements necessary to install and run Relate 11.4 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 11.4.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 10](#).

# 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 12](#).
3. Download and run the `jdk-7uXX-windows-yyyv.exe` application, where:
  - `xx` is the revision number.
  - `yyyv` 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.

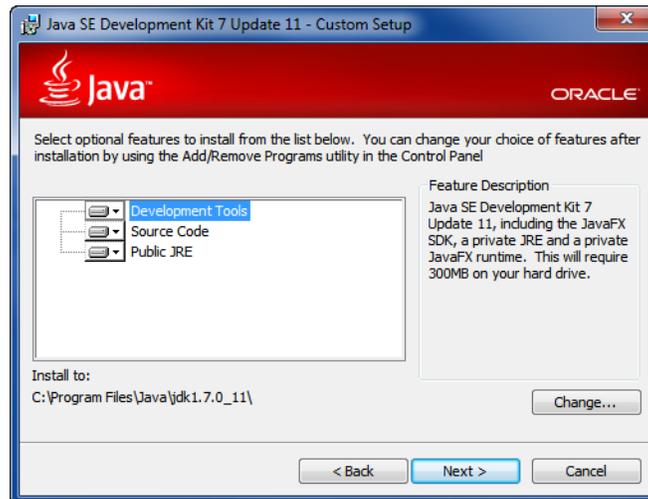


Figure 1-2: Choose Program Features

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. From the **Start** menu, select **Control Panel**.
2. In the Control Panel, double-click **System**.  
The System Properties window opens.
3. Click the **Advanced** tab.
4. On the Advanced tab, click the **Environment Variables** button.  
The Environment Variables window opens.
5. 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 11.
    - If the value is correct, continue with step 14.



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

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

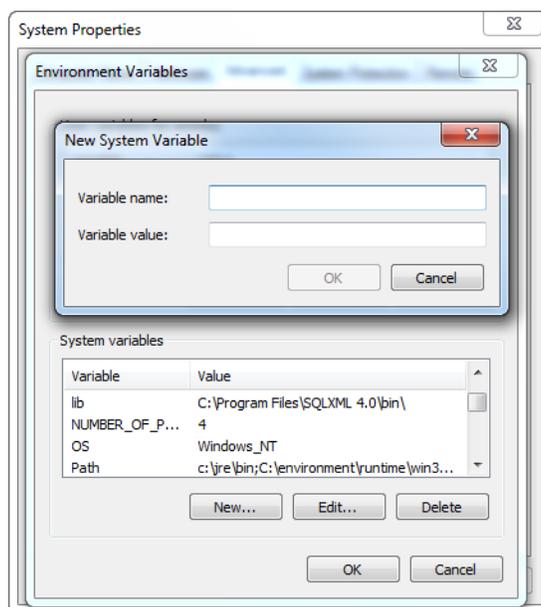


Figure 1-4: Add New System Variable

7. Enter `JAVA_HOME` in the **Variable name** field. Ensure that the variable name is all upper case.
8. 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.
9. Click **OK** to save the system variable information.  
Continue with step 14.
10. 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.
11. Click **Edit**.

The Edit System Variable window opens.

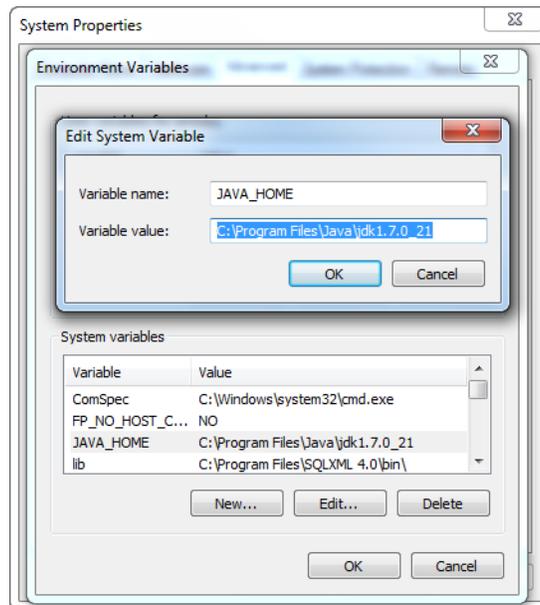


Figure 1-5: Edit Java Home

12. 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.
13. Click **OK** to save the system variable information.  
Continue with the next step.

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

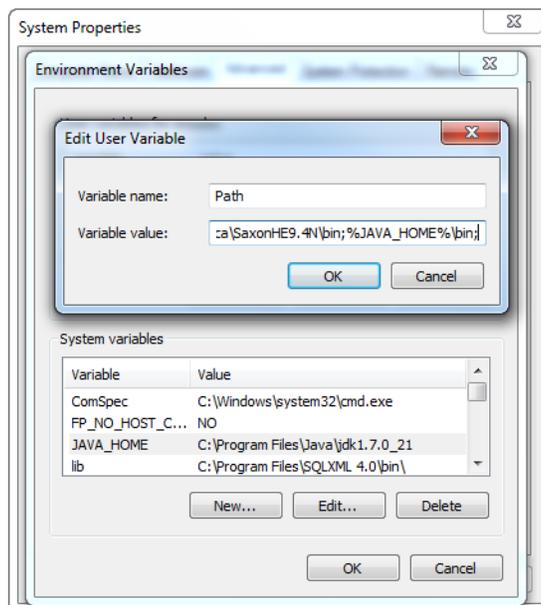


Figure 1-6: Edit Path

15. Check whether the value `%JAVA_HOME%\bin` already exists. If it does, you are finished with this procedure.  
Otherwise, continue with the next step.
16. 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.
17. Append the following to the end of the value in the **Variable value** field:
- ```
;%JAVA_HOME%\bin
```
18. Click **OK** to save the System Variables.
19. In the Environment Variables window, click **OK** to save the Environment Variable information.
20. 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.

# New Installation

## Overview

This chapter describes the procedure for a new installation of the Relate 11.4 components (Relate Services and Conflate) in either a Linux or Windows environment. This chapter also describes the setup of the database, either Oracle or SQL Server.

This implementation process is for a single organization. If you are implementing a multiple organization setup, see the *Relate Configuration Guide* for information and instructions.

## Assumptions

This chapter assumes the following:

- ❑ The host computer has a server Operating System (OS) installed.
- ❑ The database software (Oracle or SQL Server) is installed.
- ❑ Java Development Kit (JDK) 1.7.x has been installed.



*Relate no longer uses virtual hostnames, so the local system name does not need to be configured in the system `host` file.*

The following information should be on hand before starting this procedure:

- ❑ **Organization Code** - 3-character code assigned to the organization (i.e. gss, wpl, abc, etc.)
- ❑ **Organization ID** - 3-digit code assigned to the organization (i.e. 301, 123, 988, etc.)
- ❑ **Virtual machine name** for the server (i.e. opscrm75gss).

## Installation Procedure

Relate installation has the following steps:

- Install the Relate components (see [“Relate Installation” on page 16](#)).
- **[OPTIONAL]** Set up Relate to run as a Windows service (see [“Relate Services Setup” on page 16](#)).
- Install the database components (see [“Database Installation” on page 19](#)).
- Configure Relate and the Database (see [“Create the Organization” on page 22](#)).
- Set up the client directories (see [“Client Directories” on page 26](#)).
- Perform initial configuration (see [“Initial Configuration” on page 27](#)).

## Relate Installation

This section contains instructions for installing the Relate components (Relate Services and Conflate). The instructions are applicable to both the Linux and Windows environments.

Use the following procedure to install the Relate components:

1. On the installation CD, open the `/RELATE_1140_IMAGE/srv.zip` file.
2. Extract the `/srv` directory onto the root drive of your server.
3. Make sure that you have the following file structure in your root directory:

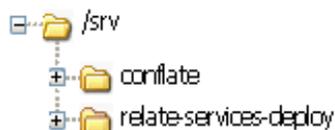


Figure 2-1: Relate Installation Directory Structure

4. You have completed the basic installation of Relate 11.4.

## Relate Services Setup

If you are running under a Windows environment, you will likely want to run Relate Services as a Windows service.



If Relate is being run with a 64-bit JDK, the 64-bit version of the Apache Tomcat .exe files must be installed. These can be downloaded from Apache's website at <http://tomcat.apache.org/download-70.cgi>.

Use the following procedure to set up Relate Services as a Windows service:

1. Open a command prompt.
2. Navigate to `c:\srv\relate-services-deploy\apache-tomcat\bin`.
3. If an earlier version of Relate is installed on the system, run the following command:

```
service remove RelateServices
```

4. Run the following command:

```
service install RelateServices
```

where `RelateServices` is the name of the service.

5. Run the following command:

```
tomcat7w //ES//RelateServices
```

where `RelateServices` is the name of the service. The RelateServices Properties window is displayed.

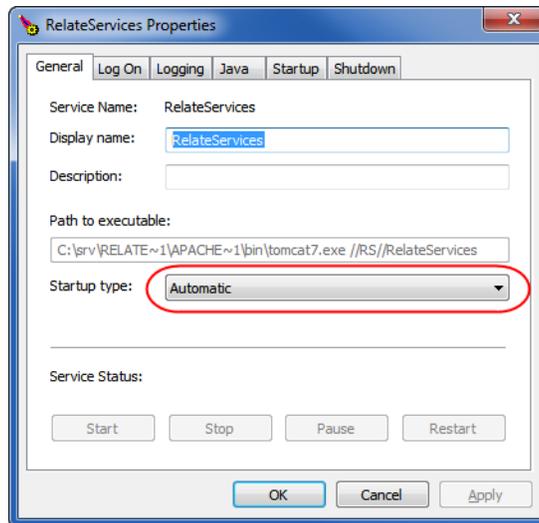


Figure 2-2: RelateServices Properties - General Tab

6. Make sure the **Startup type** is set to **Automatic**.
7. If desired, you may enter a **Display Name** for the RelateServices service. In [Figure 2-2](#) above, the Display Name was changed to `RelateServices`.
8. Select the **Java** tab.
9. Uncheck the **Use default** check box.

10. In the **Java Virtual Machine** text box, use the browser button to navigate to and select `jvm.dll` in the `jre\bin\server` folder of the JDK.

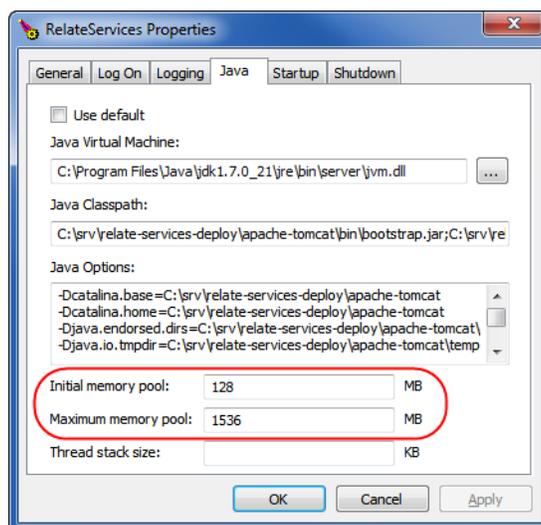


Figure 2-3: RelateServices Properties - Java Tab

11. Set the contents of **Initial memory pool** and **Maximum memory pool** as needed.



*Unlike previous versions of Relate, RelateServices is the only services that will be running in Relate 11.4. Because of this, the Initial Memory Pool should be set to 512MB and the Maximum Memory Pool should be set to 1024MB, at minimum.*

12. If necessary, add the following to the Java Options:

-Dfile.encoding=UTF8

13. Make sure the contents of **Java Options** are as follows:

-Dcatalina.base=C:\srv\relate-services-deploy\apache-tomcat

-Dcatalina.home=C:\srv\relate-services-deploy\apache-tomcat

-Djava.endorsed.dirs=C:\srv\relate-services-deploy\apache-tomcat\endorsed

-Djava.io.tmpdir=C:\srv\relate-services-deploy\apache-tomcat\temp

-Djava.util.logging.manager=org.apache.juli.ClassLoaderLogManager

-Djava.util.logging.config.file=

C:\srv\relate-services-deploy\apache-tomcat\conf\logging.properties

**(Note:** This setting must all be on one line.)

-Dfile.encoding=UTF8

-XX:MaxPermSize=256m

14. Select the **Startup** tab.

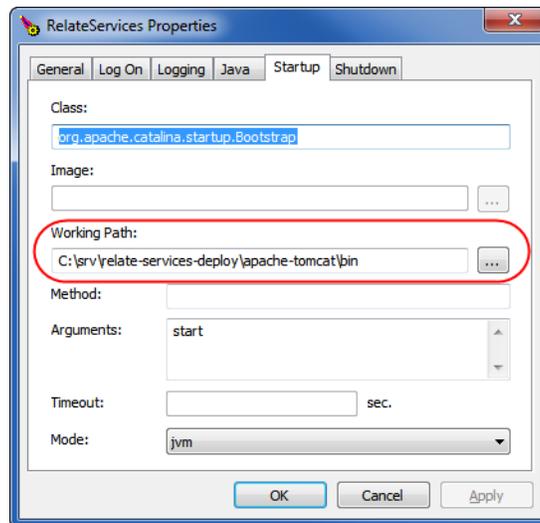


Figure 2-4: RelateServices Properties - Startup Tab

15. If necessary, change the **Working Path** to

`C:\srv\relate-services-deploy\apache-tomcat\bin`. If you installed to a different path, adjust the path as necessary.

16. Click **OK**.

## Database Installation

This section provides instructions for installing the database that will be used with Relate. Both Oracle and SQL Server databases are covered. Before starting either procedure, the appropriate database application (Oracle or SQL Server) must be installed.

### Oracle

The Relate Oracle installation scripts create the tablespaces, users, roles, and application objects for the Relate application. The scripts are designed to use the following tablespaces, roles, and users:

- Tablespaces
  - RELATE\_DATA** - Relate tables
  - RELATE\_INDEXES** - Relate indexes
- Roles
  - CRM\_APP\_USERS**
- Profile
  - relate\_profile**
- Users
  - RELATE** - Relate schema owner
  - RELATE\_USER** - Relate application user

The scripts will also create public synonyms for all of the Relate objects. Some of the scripts will need to be modified to support local environment considerations.

## Installation

The Oracle scripts need to be executed using SQL/Plus, by a user with DBA authority. The scripts will be creating tablespaces, roles, and users, along with application tables, indexes, views, procedures, functions, and public synonyms.

1. Perform the following steps to modify and run the script `01CreateTBS.sql` to create tablespaces:

- a. Modify the file `01CreateTBS.sql`, replacing the following variables with valid storage locations:

- **&FilePWD\_RELATE\_Data** - File location for the RELATE\_DATA tablespace
- **&FilePWD\_RELATE\_Index** - File location for the RELATE\_INDEX tablespace

Along with changing the listed tokens, the initial size and auto growth size parameters can also be modified, along with creating additional data files if additional storage is required.

- b. From within SQL/Plus execute the script `01CreateTBS.sql` with the following command:

```
@01CreateTBS.sql
```

The tablespaces are created.

- c. Review the log file `CreateTBS.log` for ORA- or SP2- errors. Critical errors must be corrected before executing the next script.

2. Perform the following steps to modify and run the script `02CreateUsers.sql` to create roles and users:

- a. Modify the file `02CreateUsers.sql`, replacing the following variables with password for the user accounts. Some of these accounts/passwords will be used by the Relate application to connect to the database.

- **&RELATEPWD** - RELATE's password
- **&RELATEUSEPWD** - RELATE\_USER's password

- b. From within SQL/Plus execute the script `02CreateUsers.sql` with the following command:

```
@02CreateUsers.sql
```

- c. Review the log file `CreateUsers.log` for ORA- or SP2- errors. Critical errors must be corrected before executing the next script.

3. Perform the following steps to modify and run the script `03CreateRELATE.sql` to create the Relate application objects:

- a. From within SQL/Plus execute the script `03CreateRELATE.sql` with the following command:

```
@03CreateRELATE.sql
```

- b. Review the log file `CreateRELATE.log` for ORA- or SP2- errors. Critical errors must be corrected before executing the next script.

4. Perform the following steps to load the required initial data for the QRTZRS objects:

- a. From within SQL/Plus execute the script `04LoadQRTZRS.sql` with the following command:

```
@04LoadQRTZRS.sql
```

- b. Review the log file `LoadQRTZRS.log` for ORA- or SP2- errors. Critical errors must be corrected before executing the next script.

5. Grant permission to the DBMS\_CRYPTO package by running the following command as the SYSDBA:

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

## SQL Server

The Relate SQL Server installation scripts will create the database, users, and application objects for the Relate application.

## Installation

The SQL Server scripts need to be executed using Microsoft SQL Server Management Studio (SSMS), by a user with sysadmin authority. The scripts will be creating: the Relate database, application users, along with application tables, indexes, views, procedures, functions.

1. Perform the following steps to create the Relate Database:
  - a. Load the script file `01CreateDB.sql` into SSMS.
  - b. Find and replace all occurrences of the following tokens with the appropriate value:
    - **@@DATAFILES@@** - File Location, Data
    - **@@INDEXFILES@@** - File Location, Indexes
    - **@@LOGFILES@@** - File Location, Log File
    - **@@DBNAME@@** - Database Name
    - **@@RECOVERYMDL@@** - Recovery Model (Full or Simple)

The initial file size and auto growth parameters can also be modified.

- c. Execute the script `01CreateDB.sql` in SMSS.
  - d. Review the output for errors. Critical errors must be corrected before executing the next script.
2. Perform the following steps to create the required roles and users:
  - a. Load the script file `02CreateUser.sql` into SSMS.
  - b. Find and replace all occurrences of the following tokens with the appropriate value:
    - **@@DBNAME@@** - Database Name
    - **@@RELATEUSER@@** - Relate User
    - **@@RELATEPASSWD@@** - Relate's Password

Some of these accounts / passwords will be used by the Relate application to connect to the database.

- c. Execute the script `02CreateUser.sql` in SSMS.
    - d. Review the output for errors. Critical errors must be corrected before executing the next script.
  3. Perform the following steps to create the Relate application objects:
    - a. Load the script file `03CreateRelate.sql` into SSMS.
    - b. Find and replace all occurrences of the following tokens with the appropriate value:
      - `@@DBNAME@@` - Database Name
    - c. Execute the script `03CreateRelate.sql` in SMSS.
    - d. Review the output for errors. Critical errors must be corrected before executing the next script.
  4. Perform the following steps to load the initial data:
    - a. Load the script file `04LoadData.sql` into SSMS.
    - b. Find and replace all occurrences of the following tokens with the appropriate value:
      - `@@DBNAME@@` - Database Name
      - `@@DATAFILEDIR@@` - CSV File Location (the CSV files will be located in the `Data` folder where the DB scripts are found)
    - c. From within SSMS execute the script `04LoadData.sql`
    - d. Review the output for errors. Critical errors must be corrected before executing the next script.

## Create the Organization

In this section you will use the Conflate configuration tool to configure Relate.

---

**See also:** The *Relate Configuration Guide* for more information on the use of Conflate.

---

1. Stop Relate Services (see [Appendix A: "Start/Stop Relate Services" on page 55](#) for procedures).
2. Start the Conflate configuration tool using one of the following methods:

### Windows

- Navigate to the `c:\srv\conflate` directory and double-click the `conflate.jar` file.
- In a command prompt, navigate to the `c:\srv\conflate` directory and run:

```
java -jar conflate.jar
```

### Linux

- In a command prompt, navigate to the `/srv/conflate` directory and run:

```
java -jar conflate.jar
```

Because there are no organizations defined yet, the Add Org window is displayed.

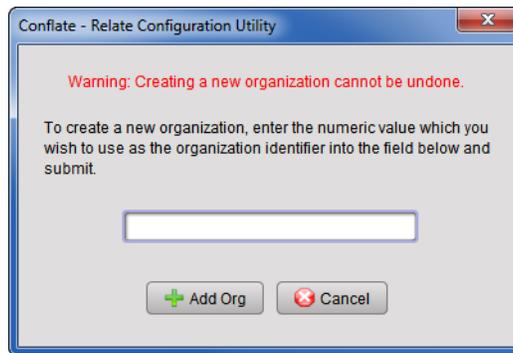
**3. Create the organization:**

Figure 2-5: Add Org Window

- a. Enter the organization ID. The organization ID is the 3-digit number assigned to the organization.
- b. Click the **Add Org** button. The Add Organization window closes and the Main window is displayed.

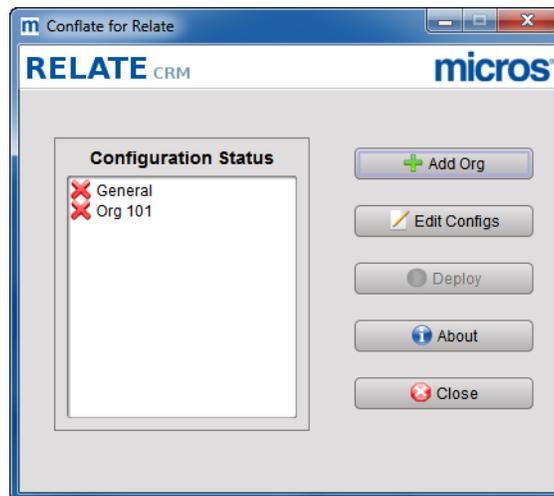


Figure 2-6: Conflate GUI Main Screen

**4. Configure Relate settings:**

- a. On the Main screen, click the **Edit Configs** button.

The General tab of the edit window is displayed.

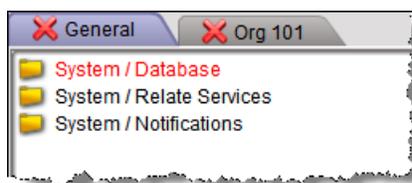


Figure 2-7: Conflate Edit Screen - General Tab



*The categories that need attention are shown in red. When a category is opened, the specific settings that need attention are shown in red.*

- b.** In the General tab, go to each Category/Configuration that is in red and enter the appropriate setting.  
When there are no red categories in the General tab, you are finished in the General tab.
  - c.** Select the **Org XXX** tab, where XXX is the organization ID for the organization you are configuring.
  - d.** Go to each Category/Configuration in the Conflate Edit Screen ([Figure 2-7 on page 24](#)) that is in red and enter the appropriate setting. When there are no red categories in the organization tab, you are finished in the organization tab.  
For more information about creating export directories, see ["Export Directories" on page 26](#).
  - e.** When you are finished entering configuration settings and there are no more red Categories/Configurations, click **Save**.
  - f.** Those categories/configurations that were not red either did not require a setting or had default settings. This would be a good time to review those settings—especially the export folders—to make sure they are correct.
- 5.** Click **Close** to return to the Main screen. There should be a green check mark next to General and the organization ID.
  - 6.** Click **Deploy**.
  - 7.** Click **Yes** when asked **Configure Relate with the current settings?**

# Database Organization Script

This section will complete the database setup.

## Oracle

1. In SQL/Plus, run the script `add-orgid-xxx.sql` (where `xxx` is the organization ID) with the proper command for your system:
  - ❑ **Linux** - `@/srv/conflate_repository/dbscripts/add-orgid-xxx.sql`
  - ❑ **Windows** - `@C:\srv\conflate_repository\dbscripts\add-orgid-xxx.sql`
2. In SQL/Plus, run the script `add-reports-xxx.sql` (where `xxx` is the organization ID) with the proper command for your system:
  - ❑ **Linux** - `@/srv/conflate_repository/dbscripts/add-reports-xxx.sql`
  - ❑ **Windows** - `@C:\srv\conflate_repository\dbscripts\add-reports-xxx.sql`

## SQL Server

1. In the SQL Server Management Studio Object Explorer pane, expand the database folder and select the database that was created earlier.

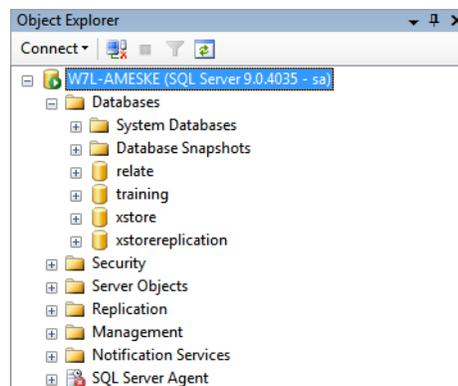


Figure 2-8: Select Restored Database

2. From the menu, select **File -> Open -> File**.
3. Navigate to `C:\srv\conflate_repository\dbscripts` and select the `add-orgid-xxx.sql` file for the organization being installed (where `xxx` is the organization ID).
4. Click **Open**. The script will open in a SQL Server Management Studio window.
5. Click **Execute** to run the script.
6. From the menu, select **File -> Open -> File**.
7. Navigate to `C:\srv\conflate_repository\dbscripts` and select the `add-reports-xxx.sql` file for the organization being installed (where `xxx` is the organization ID).
8. Click **Open**. The script will open in a SQL Server Management Studio window.
9. Click **Execute** to run the script.

## Start Services

Start Relate Services (see [Appendix A: "Start/Stop Relate Services" on page 55](#) for procedures).

## Client Directories

### Export Directories

The export directories are used when files such as Card Series, Promotions, or Customer Segments are exported. The export directories must exist on the server.



*The directories you set up in this procedure and the directories specified in Conflate must match.*

Each organization will have its own export directory structure.

Use the following procedure to set up export directories for the new organization:

1. Go to the Award category and select **Award Export Directory**.
2. Click the **Browse** button to the right of the text box. The Open File dialog box is displayed.

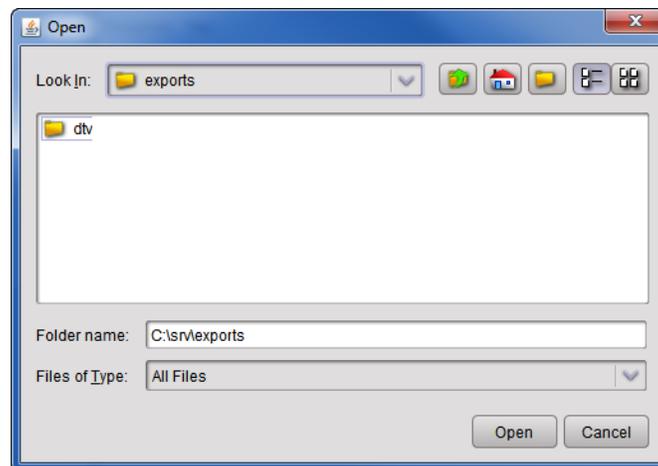


Figure 2-9: Open File Dialog Box

3. Navigate to `c:\srv\exports` (Windows) or `/srv/exports` (Linux).
4. Click the Create New Folder icon  or .
5. Type the 3-character organization code (i.e. abc, omg, etc.) in the space provided.
6. Navigate to the new directory.

7. Click the Create New Folder icon  or .
8. Type `award` in the space provided.
9. Click **Open**. The setting in the text box should be `file:/c:/srv/exports/xxx/award` (Windows) or `file:/srv/exports/xxx/award` (Linux) where `xxx` is the three-character organization code.
10. Create the remaining export directories:
  - a. Go to the Category/Title indicated in the table below.
  - b. Use the **Browse** button and **Open File** dialog box to create the directories shown in the table below.
  - c. Make sure the Conflate settings match the table below (W indicates Windows and L indicates Linux).

| Category     | Title                                   | Setting                                                                                                                         |
|--------------|-----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------|
| Cards        | Card Series Export Directory            | <code>file:/c:/srv/exports/xxx/cardSeries</code> (W)<br><code>file:/srv/exports/xxx/cardSeries</code> (L)                       |
| Loyalty      | Loyalty Export Directory                | <code>file:/c:/srv/exports/xxx/loyalty</code> (W)<br><code>file:/srv/exports/xxx/loyalty</code> (L)                             |
| Promotion    | Promotion Event File Upload Directory   | <code>file:/C:/srv/exports/dtv/promotion/attachments</code> (W)<br><code>file:/srv/exports/dtv/promotion/attachments</code> (L) |
| Promotion    | Promotion Export Directory              | <code>file:/c:/srv/exports/xxx/promotion</code> (W)<br><code>file:/srv/exports/xxx/promotion</code> (L)                         |
| Promotion    | Promotion Transforms Export Directory   | <code>file:/c:/srv/exports/xxx/promotion</code> (W)<br><code>file:/srv/exports/xxx/promotion</code> (L)                         |
| Segment      | Customer Segment Export Directory       | <code>file:/c:/srv/exports/xxx/segment</code> (W)<br><code>file:/srv/exports/xxx/segment</code> (L)                             |
| Stored Value | Tender Activity Report Export Directory | <code>file:/c:/srv/exports/tender_report</code> (W)<br><code>file:/srv/exports/tender_report</code> (L)                         |

11. Repeat steps 3 through 10 for each organization.

## Initial Configuration

Refer to [Chapter 4, "Initial Configuration" on page 43](#) for instructions on the initial configuration of Relate.



# Upgrade

## Overview

This chapter presents the information and procedures necessary to upgrade Relate to version 11.4.



*If you need to upgrade from a version of Relate older than version 11.1, please contact your project manager for more information.*

## Upgrade Process

The upgrade procedure consists of the following steps:

- Back up and upgrade the database (see ["Upgrade Database" on page 30](#)).
- Preserve the current Relate installation (see ["Preserve Existing Installation" on page 34](#)).
- Install the new version of Relate (see ["Install Relate 11.4" on page 35](#)).
- Configure Relate and the database (see ["Configuration" on page 38](#)).
- Set up client directories (see ["Client Directories" on page 40](#)).
- Perform initial configuration (see ["Initial Configuration" on page 42](#)).

## Prerequisites

This chapter assumes the following:

- Java Development Kit (JDK) 1.7.x has been installed.
- A copy of the Relate CRM version 11.4.x Installation/Upgrade CD is on hand.
- Relate 11.1 and an associated database is installed and working.

## Upgrade Database

The purpose of the section is to:

- Back up the current database in case problems arise with the database upgrade.
- Upgrade the database for Relate 11.4.

### Stop Services

Stop Relate Services on the system (see [Appendix A: "Start/Stop Relate Services" on page 55](#) for procedures).

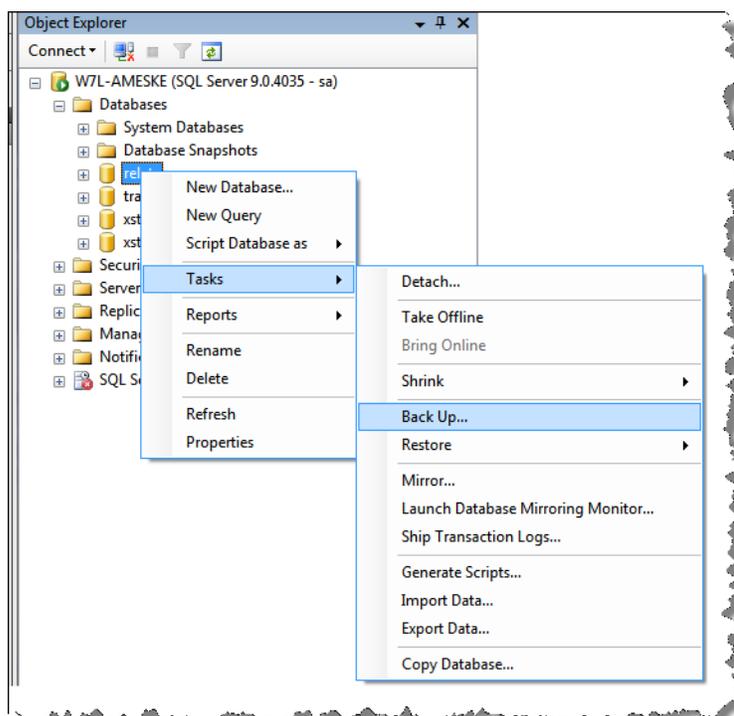
### Back Up the Database

The purpose of the backing up the database is to be able to restore the current database in case of problems with the database upgrade.

Use the appropriate procedure to back up the database to a safe location:

### SQL Server

1. Open SQL Server Management Studio.
2. In the Object Explorer panel, expand the Databases list.
3. Right-click on the database that you want to back up and select **Tasks -> Back Up**. The Back Up Database window is displayed.



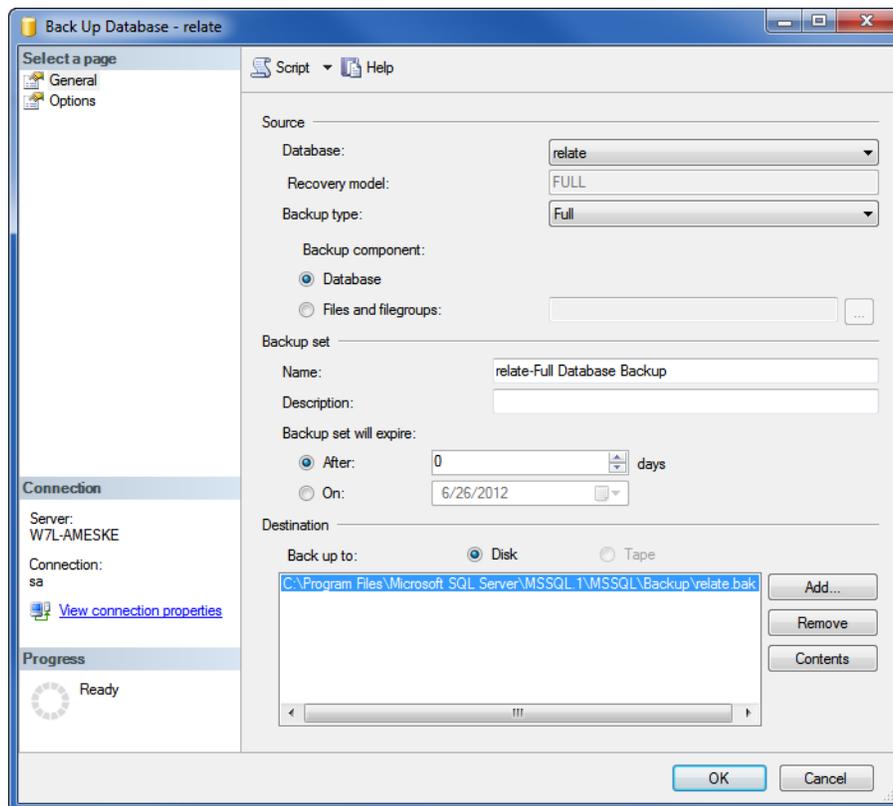


Figure 3-1: Back Up Database Window

4. Back up the database:
  - a. In the Source section make sure that the **Database** listed is the Relate database and the **Backup Type** is **Full**.

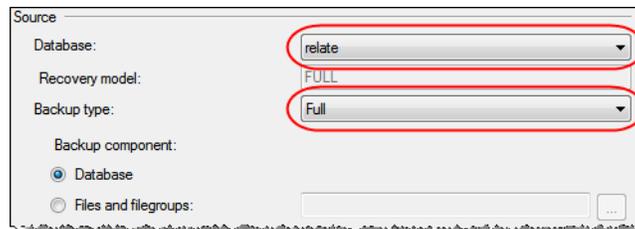


Figure 3-2: Back Up Database Window - Source Section

- b. In the Backup set section, make sure the **Name** is the proper name for the backup. If necessary, change the name.

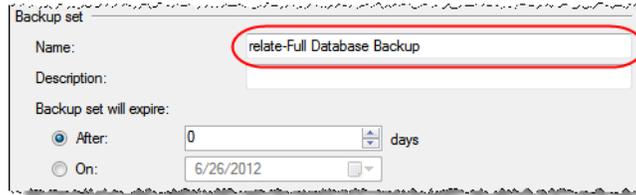


Figure 3-3: Back Up Database Window - Backup Set Section

- c. In the **Destination** section, make sure the proper destination file is selected.

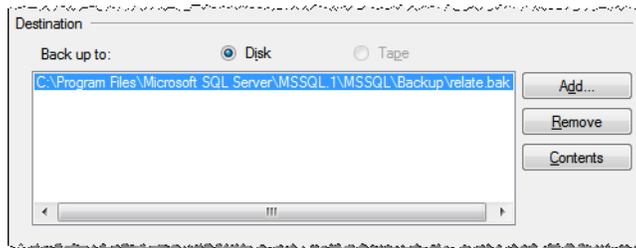


Figure 3-4: Back Up Database Window - Destination Section

To change the destination, do the following:

- 1) Click **Add**. The Select Backup Destination window is displayed.

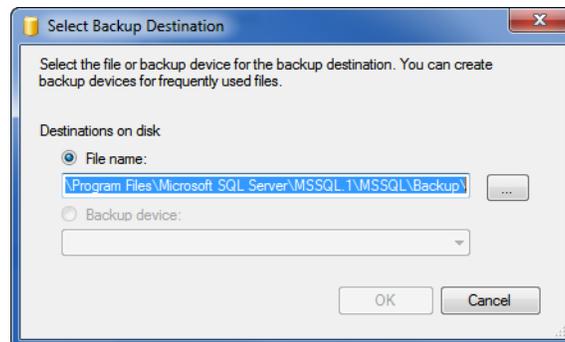
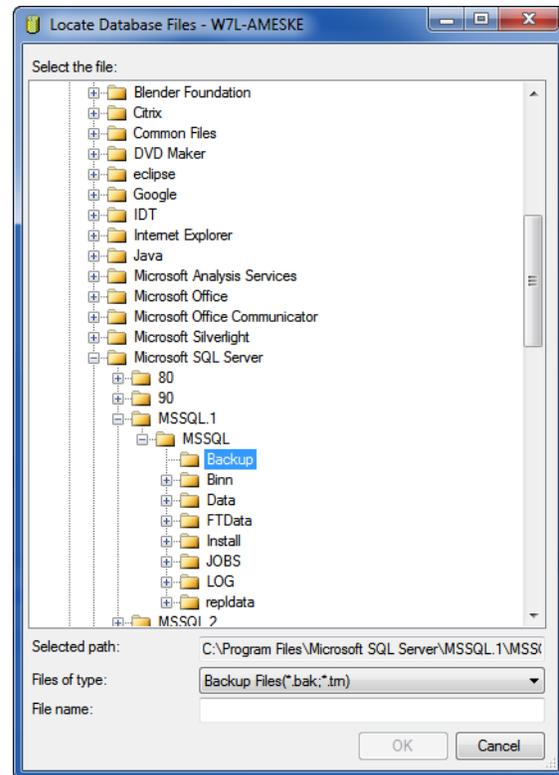


Figure 3-5: Select Backup Destination Window

- 2) Change the destination in the text box or click the ... button to display a navigation window.

- 3) In the Locate Database Files window, navigate to the directory where the backup file will be stored.
  - 4) Select the directory. The directory name will be shown in the **Selected path** text box.
  - 5) In the **File name** text box, fill in the name of the backup file.
  - 6) Click **OK**.
  - 7) In the Select Backup Destination window, click **OK**.
- d. In the Back Up Database window, click **OK** to start the back up.
  - e. When the backup is complete, click **OK** in the success confirmation dialog box.



## Oracle

Use the Oracle utility RMAN (or equivalent) to back up the current instance of the database to a safe location.

## Upgrade the Database

In this section you will run a database script that will upgrade the existing database for Relate 11.4.



*Look for errors after running the following script. If any errors occur, contact your product representative for assistance.*

## Oracle

Use SQLPlus to run the database upgrade scripts provided. These scripts should be run as the Relate user.

1. Open the file `db-updates.sql` using your database interface software (e.g. sqlplus for Oracle).
2. Execute the script `db-updates.sql`.

The database schema is updated to version 11.4.



*This script creates a log file. Check the log file for errors and make any necessary updates and/or corrections before continuing.*

## SQL Server

Use SQL Server Management Studio to run the database upgrade scripts provided.

1. Open SQL Server Management Studio.
2. In the Object Explorer panel, expand the Databases folder and select the database that will be upgraded.
3. From the menu, select **File -> Open -> File**.
4. Navigate to and select the `db-updates.sql` file.
5. In the `db-updates.sql` file, find the line `USE [@@DBNAME@@]` and replace `@@DBNAME@@` with the name of the Relate database, then save the file.
6. Execute the script `db-updates.sql`.

The database schema is updated to version 11.4.

## Preserve Existing Installation

The purpose of preserving the current installation is to be able to restore it in case there are problems with the upgrade to Relate 11.4.

Use the following procedure to preserve the current Relate installation:

1. Navigate to `C:\srv` (Windows) or `/srv` (Linux).
2. Rename the `srv` folder to `srv-111` or something similar.



*If you need to restore the Relate 11.1 installation, rename the folder back to `srv`, restore the previous database, and recreate the service.*

## Install Relate 11.4

This section contains instructions for installing the Relate components (Relate Services and Conflate). The instructions are applicable to both the Linux and Windows environments.

Use the following procedure to install the Relate components:

1. On the installation CD, open the `/RELATE_1140_IMAGE/srv.zip` file.
2. Extract the `/srv` directory onto the root drive of your server.
3. Make sure that you have the following file structure in your root directory:



Figure 3-6: Relate Installation Directory Structure

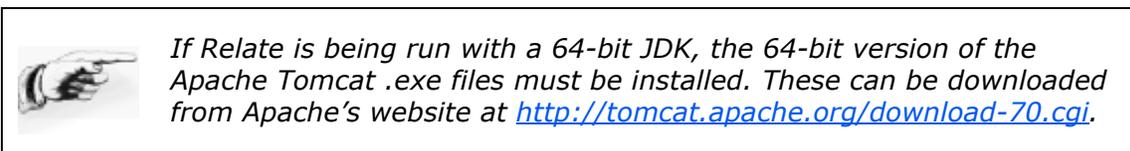
4. Copy the `conflate_repository` directory from the backup directory to the new installation folder. This preserves the Conflate answers from the previous installation.
5. Copy the `exports` directory from the backup directory to the new installation folder. This preserves the export directories and directory structure for all organizations from the previous version.
6. Open a command prompt.
7. Navigate to the `conflate` directory for Relate:
  - ❑ For Windows, **[DEFAULT]** = `c:\srv\conflate`
  - ❑ For Linux, **[DEFAULT]** = `/srv/conflate`
8. Run the following commands in the order given.
  - ❑ For Windows:

```
conflate merge
conflate generate
conflate deploy
```
  - ❑ For Linux:

```
./conflate.sh merge
./conflate.sh generate
./conflate.sh deploy
```
9. If there were no errors, close the command prompt.
10. If you are running under a Windows environment, you will need to drop and recreate the Relate Services service. Perform the procedure ["Relate Services Setup" on page 36](#).
11. You have completed the basic installation of Relate 11.4.

## Relate Services Setup

If you are running under a Windows environment, you will likely want to run Relate Services as a Windows service.



Use the following procedure to set up Relate Services as a Windows service:

1. Open a command prompt.
2. Navigate to `c:\srv\relate-services-deploy\apache-tomcat\bin`.
3. Run the following command:

```
tomcat7w //ES//RelateServices
```

where `RelateServices` is the name of the service. The `RelateServices Properties` window is displayed.

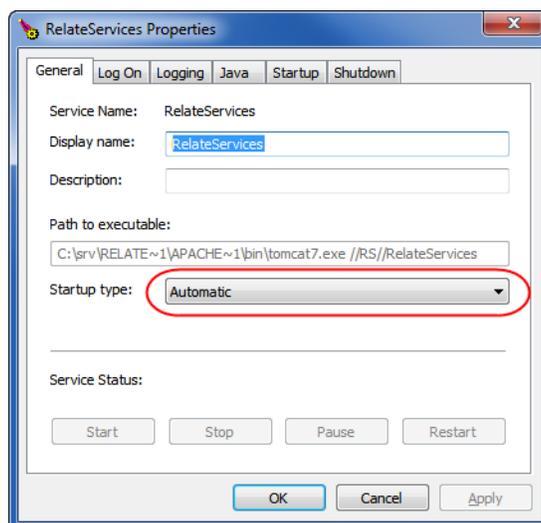


Figure 3-7: RelateServices Properties - General Tab

4. Make sure the **Startup type** is set to **Automatic**.
5. If desired, you may enter a **Display Name** for the RelateServices service. In [Figure 3-7](#) above, the Display Name was changed to `RelateServices`.
6. Select the **Java** tab.
7. Uncheck the **Use default** check box.

8. In the **Java Virtual Machine** text box, use the browser button to navigate to and select `jvm.dll` in the `jre\bin\server` folder of the JDK.

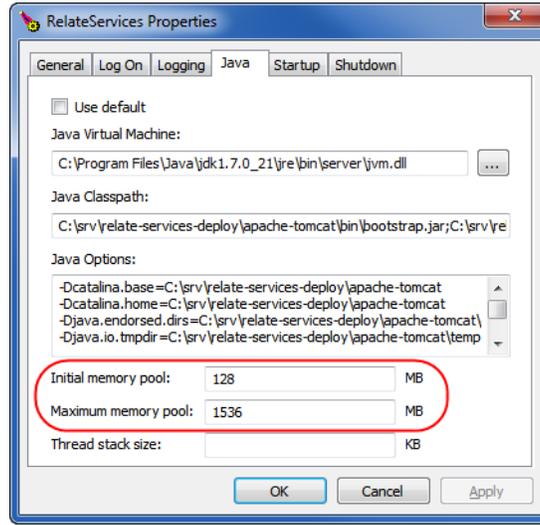


Figure 3-8: RelateServices Properties - Java Tab

9. Set the contents of **Initial memory pool** and **Maximum memory pool** as needed.
10. If necessary, add the following to the Java Options:  
`-Dfile.encoding=UTF8`
11. Make sure the contents of **Java Options** are as follows:  
`-Dcatalina.base=C:\srv\relate-services-deploy\apache-tomcat`  
`-Dcatalina.home=C:\srv\relate-services-deploy\apache-tomcat`  
`-Djava.endorsed.dirs=C:\srv\relate-services-deploy\apache-tomcat\endorsed`  
`-Djava.io.tmpdir=C:\srv\relate-services-deploy\apache-tomcat\temp`  
`-Djava.util.logging.manager=org.apache.juli.ClassLoaderLogManager`  
`-Djava.util.logging.config.file=C:\srv\relate-services-deploy\apache-tomcat\conf\logging.properties`  
*(Note: This setting must all be on one line.)*  
`-Dfile.encoding=UTF8`  
`-XX:MaxPermSize=256m`

12. Select the **Startup** tab.

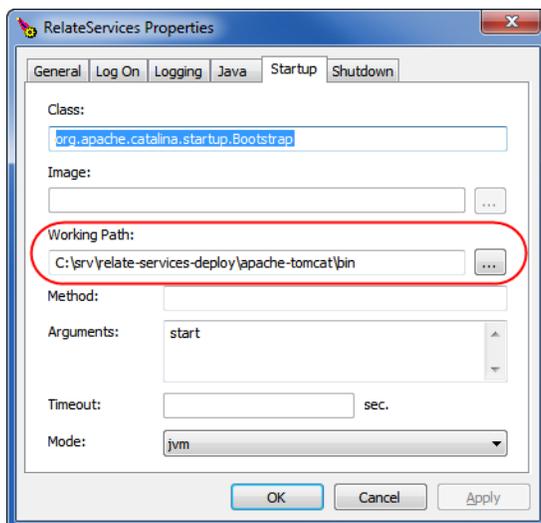


Figure 3-9: RelateServices Properties - Startup Tab

13. If necessary, change the **Working Path** to `C:\srv\relate-services-deploy\apache-tomcat\bin`. If you installed to a different path, adjust the path as necessary.

14. Click **OK**.

## Configuration

In this section you will use the Conflate configuration tool to configure Relate.

**See also:** The *Relate Configuration Guide* for more information about the use of Conflate.

1. Start the Conflate configuration tool using one of the following methods:

### Windows

- ❑ Navigate to the `c:\srv\conflate` directory and double-click the `conflate.jar` file.
- ❑ Or, in a command prompt, navigate to the `c:\srv\conflate` directory and run:
 

```
java -jar conflate.jar
```

### Linux

- ❑ In a command prompt, navigate to the `/srv/conflate` directory and run:
 

```
java -jar conflate.jar
```

2. Configure Relate settings:

- a. On the Main screen, click the **Edit Configs** button.

The General tab of the edit window is displayed.

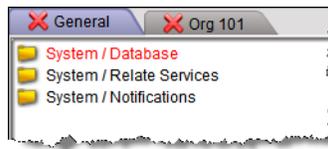


Figure 3-10: Conflate Edit Screen - General Tab



*The categories that need attention are shown in red. When a category is opened, the specific settings that need attention are shown in red.*

- b. In the General tab, go to each Category/Configuration that is in red and enter the appropriate setting.

When there are no red categories in the General tab, you are finished in the General tab.

**See also:** The *Relate Configuration Guide* for more information on the use of Conflate.

- c. Select the **Org XXX** tab, where XXX is the organization ID for the organization you are configuring.
- d. Go to each Category/Configuration that is in red and enter the appropriate setting. When there are no red categories in the organization tab, you are finished in the organization tab.

For more information about creating export directories, see ["Export Directories" on page 40](#).

Refer to the *Relate Configuration Guide* for more information on Conflate and the configuration settings.

- e. When you are finished entering configuration settings and there are no more red Categories/Configurations, click **Save**.
  - f. Those categories/configurations that were not red either did not require a setting or had default settings. This would be a good time to review those settings, especially the export folders, to make sure they are correct.
3. Configure the internal deal engine:



*The name of the internal deal engine has been changed in Relate 11.4 and must be configured manually when performing a manual update of Relate.*

- a. Select an Organization tab.
- b. In the **Promotion** folder, click to select the **Deal Engine Implementation** key.

- c. Select the proper deal engine value (**NullDealEngine** is the most commonly used).
  - d. Click the **Save** button.
  - e. Repeat steps a-d for each organization in Conflate.
4. Click **Close** to return to the Main screen. There should be a green check mark next to the organization ID.
  5. Click **Deploy**.  
Click **Yes** when asked **Configure Relate with the current settings?**.

## Client Directories

### Export Directories



*These directories may have already been created when you installed or upgraded Relate; they may be in a different location than what is shown below. If this is true, skip this procedure.*



*The directories you set up in this procedure and the directories specified in Conflate must match.*

The export directory specified in Conflate is used when files such as Card Series, Promotions, or Customer Segments are exported. The export directories must exist on the server.

Each organization will have its own export directory structure.

Use the following procedure to set up export directories for the new organization:

1. Go to the Award category and select **Award Export Directory**.

2. Click the **Browse** button to the right of the text box. The Open File dialog box is displayed.

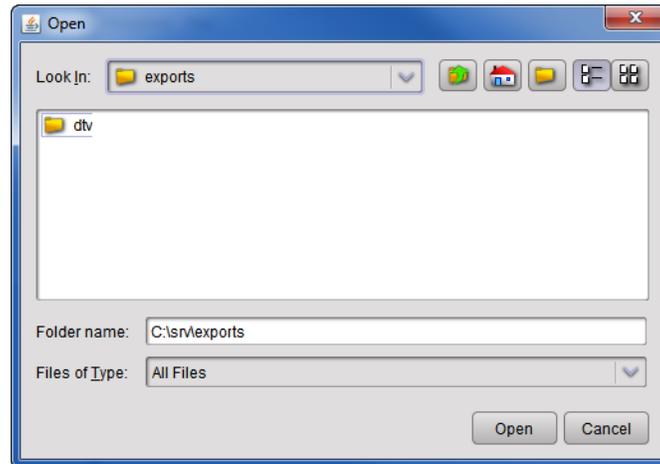


Figure 3-11: Open File Dialog Box

3. Navigate to `c:\srv\exports` (Windows) or `/srv/exports` (Linux).

4. Click the Create New Folder icon  or .

5. Type the 3-character organization code (i.e. abc, omg, etc.) in the space provided.

6. Navigate to the new directory.

7. Click the Create New Folder icon  or .

8. Type `award` in the space provided.

9. Click **Open**. The setting in the text box should be `file:/c:/srv/exports/xxx/award` (Windows) or `file:/srv/exports/xxx/award` (Linux) where `xxx` is the three-character organization code.

10. Create the remaining export directories:

- a. Go to the Category/Title indicated in the table below.
- b. Use the **Browse** button and **Open File** dialog box to create the directories shown in the table below.
- c. Make sure the Conflate settings match the table below (W indicates Windows and L indicates Linux).

| Category | Title                        | Setting                                                                                                   |
|----------|------------------------------|-----------------------------------------------------------------------------------------------------------|
| Cards    | Card Series Export Directory | <code>file:/c:/srv/exports/xxx/cardSeries</code> (W)<br><code>file:/srv/exports/xxx/cardSeries</code> (L) |
| Loyalty  | Loyalty Export Directory     | <code>file:/c:/srv/exports/xxx/loyalty</code> (W)<br><code>file:/srv/exports/xxx/loyalty</code> (L)       |

| Category     | Title                                   | Setting                                                                                               |
|--------------|-----------------------------------------|-------------------------------------------------------------------------------------------------------|
| Promotion    | Promotion Event File Upload Directory   | file:/C:/srv/exports/dtv/promotion/attachments (W)<br>file:/srv/exports/dtv/promotion/attachments (L) |
| Promotion    | Promotion Export Directory              | file:/c:/srv/exports/xxx/promotion (W)<br>file:/srv/exports/xxx/promotion (L)                         |
| Promotion    | Promotion Transforms Export Directory   | file:/c:/srv/exports/xxx/promotion (W)<br>file:/srv/exports/xxx/promotion (L)                         |
| Segment      | Customer Segment Export Directory       | file:/c:/srv/exports/xxx/segment (W)<br>file:/srv/exports/xxx/segment (L)                             |
| Stored Value | Tender Activity Report Export Directory | file:/c:/srv/exports/tender_report (W)<br>file:/srv/exports/tender_report (L)                         |

11. Repeat steps 3 through 10 for each organization.

## Initial Configuration

Continue with [Chapter 4, “Initial Configuration” on page 43](#) for instructions on the initial configuration of Relate.

# Initial Configuration

## Overview

This procedure describes the initial configuration of Relate following installation.



*If Relate 11.4 has not been installed, configuration cannot be performed. Perform the procedure in either [Chapter 2, "New Installation" on page 15](#) or [Chapter 3, "Upgrade" on page 29](#) before performing the actions in this chapter.*

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

- ["Start Relate Services" on page 44](#)
- ["Log In" on page 45](#)
- ["Perform Initial Configuration" on page 46](#)

## 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 11.1 and you have customized Segment Management query templates, these customizations must be migrated properly to be available in Relate 11.4.



*Speak with your product representative before attempting to move these configurations to Relate 11.4 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 55](#) 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.

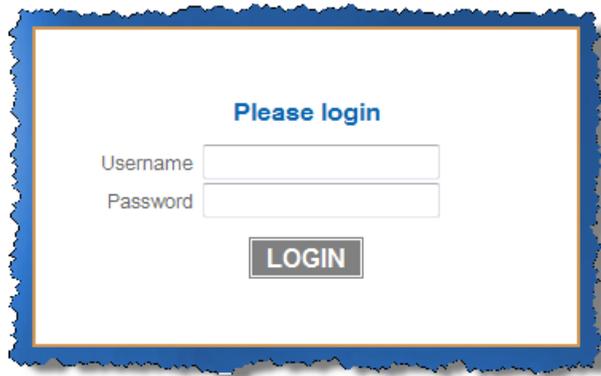


Figure 4-1: Relate Login

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.

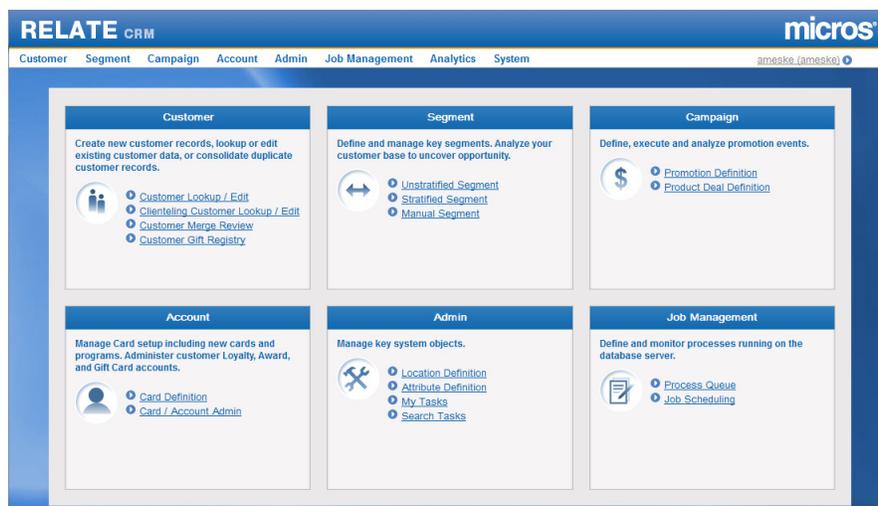


Figure 4-2: Relate Main Page

## 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 48](#) 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 50](#).

### 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 52](#).

### 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 53.](#)

## 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 4-3: System Menu

The Franchisees page opens.

| Franchisee ID | Name                             | Description                      | City         | State |
|---------------|----------------------------------|----------------------------------|--------------|-------|
| 6713          | NewFranchisee                    | NewFranchisee                    | Solon        | Ohio  |
| 6214          | DO NOT USE Highland Road         |                                  |              |       |
| 6212          | WSDL9076-TestCase1.0-Franchisee  | TestCase1.0 WSDL9076 Franchisee  | Huntsburg    | NC    |
| 6209          | WSDL19416-TestCase1.0-Franchisee | TestCase1.0 WSDL19416 Franchisee | Layettsville | WI    |
| 6208          | WSDL30713-TestCase1.0-Franchisee | TestCase1.0 WSDL30713 Franchisee | Layettsville | WI    |
| 6207          | WSDL60342-TestCase1.0-Franchisee | TestCase1.0 WSDL60342 Franchisee | Layettsville | WI    |
| 6206          | Franchisee Name xmlapi-M4146     |                                  |              |       |
| 5706          | Patrick's Party Store - Ohio     | Patrick's Party Store - Ohio     |              |       |
| 5705          | Patrick's Party Store - Michigan | Patrick's Party Store - Michigan |              |       |
| 5704          | Patrick's Party Store            | Patrick's Party Store            | New York     | NY    |
| 5209          | WSDL8611-TestCase1.0-Franchisee  | TestCase1.0 WSDL8611 Franchisee  | Layettsville | WI    |
| 5208          | WSDL20143-TestCase1.0-Franchisee | TestCase1.0 WSDL20143 Franchisee | Layettsville | WI    |

Figure 4-4: Franchisees Page

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



Figure 4-5: Import Franchisee CSV File

- A Choose a CSV File window opens.



Figure 4-6: Choose a CSV File Window

- 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.

- Click the **Import** button.

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

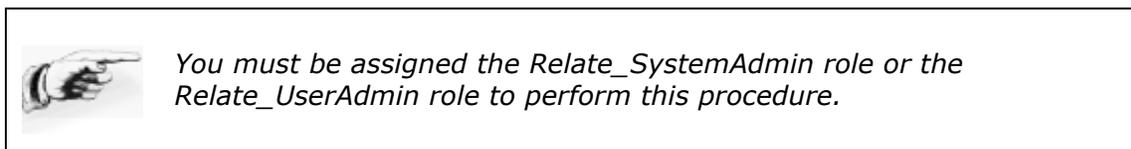


Figure 4-7: Import Success Confirmation

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:



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



Figure 4-8: System Menu

The Import User CSV File page opens.

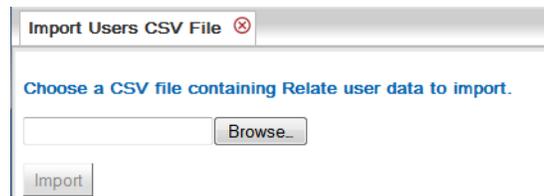


Figure 4-9: Import Users CSV File Page

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.

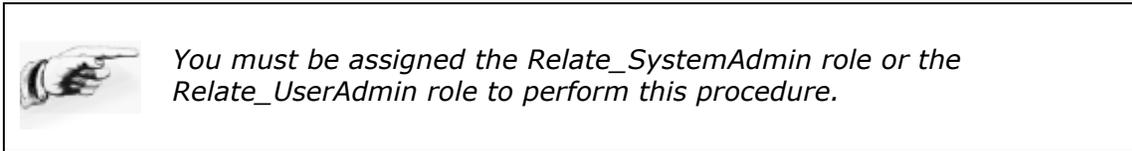


Figure 4-10: Import Success Confirmation

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:



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



Figure 4-11: System Menu

The Import User CSV File page opens.

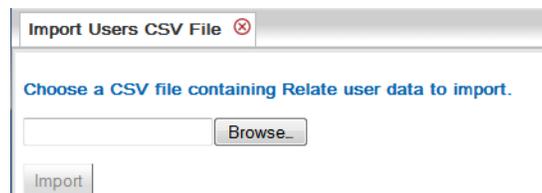


Figure 4-12: Import Users CSV File Page

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.

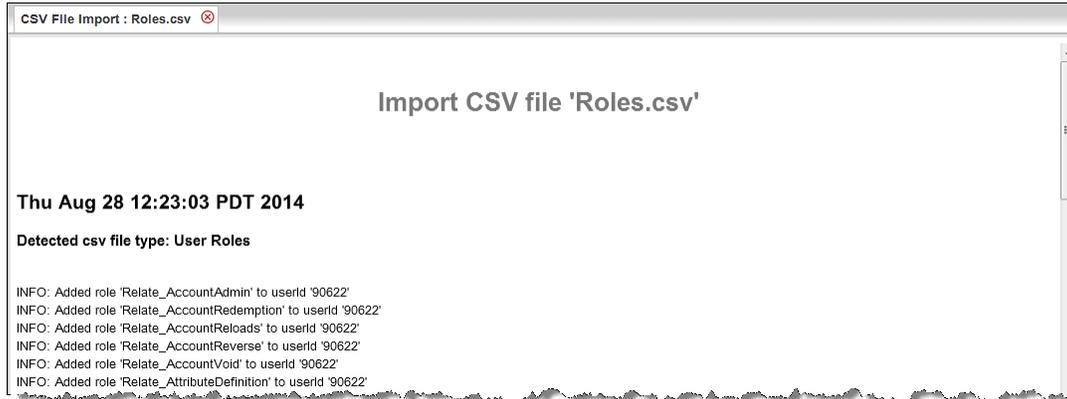
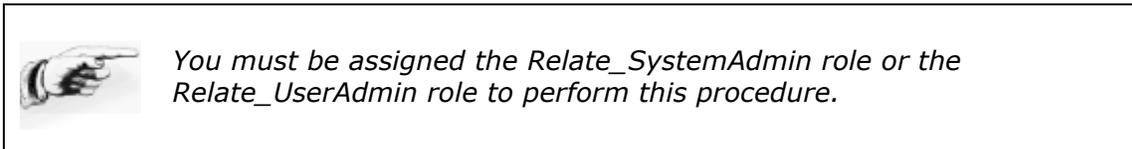


Figure 4-13: Import Success Confirmation

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:



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



Figure 4-14: System Menu

The Import User CSV File page opens.

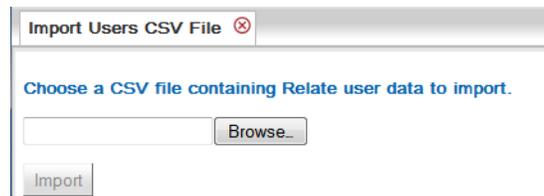


Figure 4-15: Import Users CSV File Page

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.

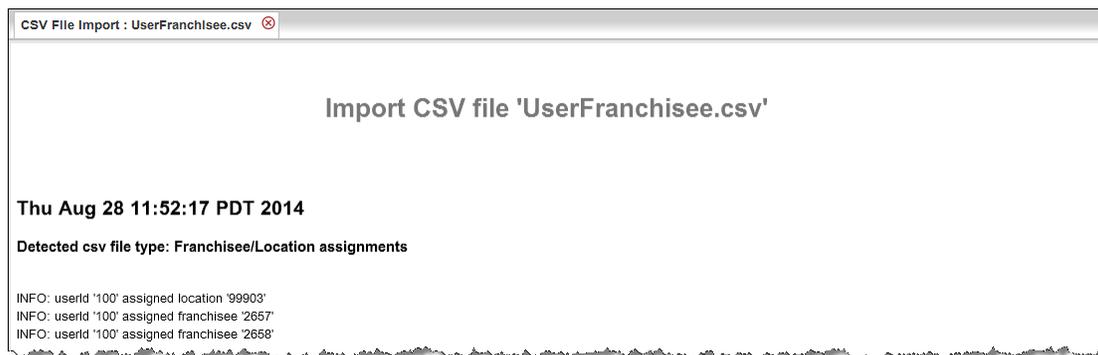


Figure 4-16: Import Success Confirmation

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

# 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.



# 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 run.

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.
3. Create a new, self-signed certificate:
  - a. Run the following command:

### Windows

```
keytool -genkey -alias tomcat -keyalg RSA -keystore  
[path]\relate.keystore -dname "cn=[hostname]" -validity [duration]
```

### Linux

```
keytool -genkey -alias tomcat -keyalg RSA -keystore  
[path]/relate.keystore -dname "cn=[hostname]" -validity [duration]
```

where:

- `[path]` is the directory where the keystore file is located.
- `[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.

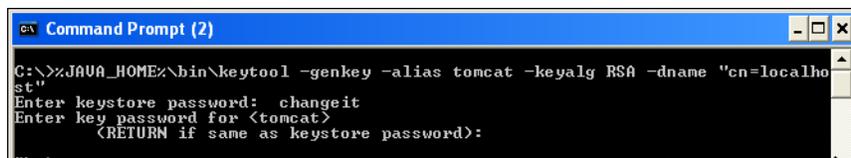


Figure B-1: Create Keystore (Windows)

## 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.

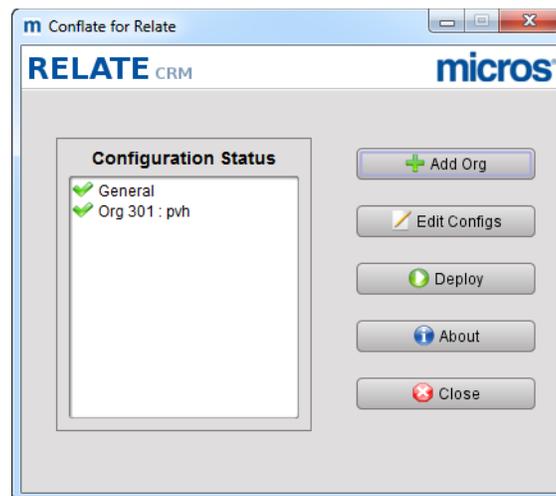


Figure B-2: Conflate Main Window

- c. Click **Edit Configs**.

The Edit Configs window opens.

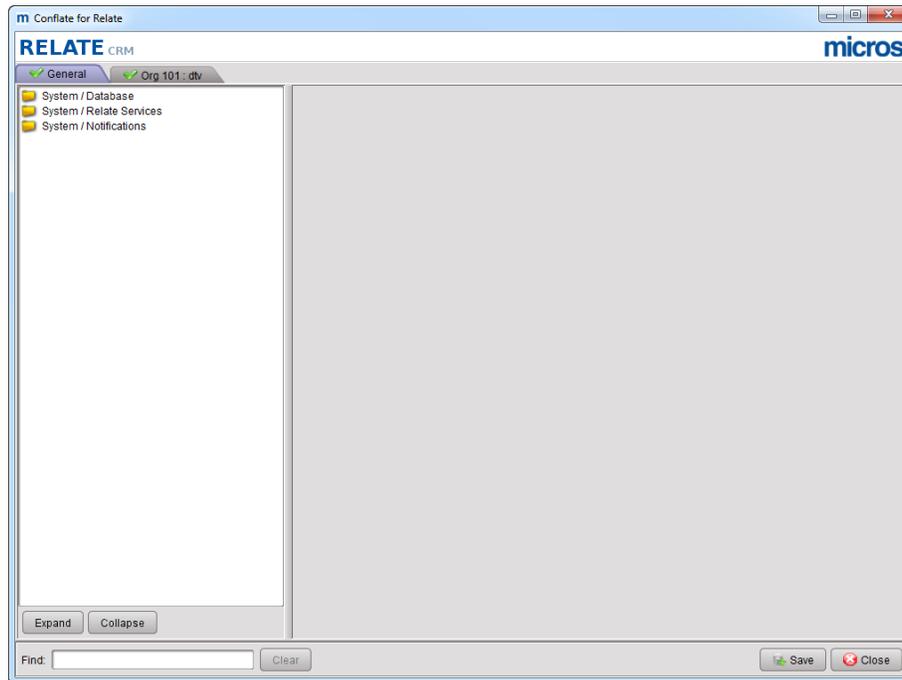


Figure B-3: Edit Configuration Window

- 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.

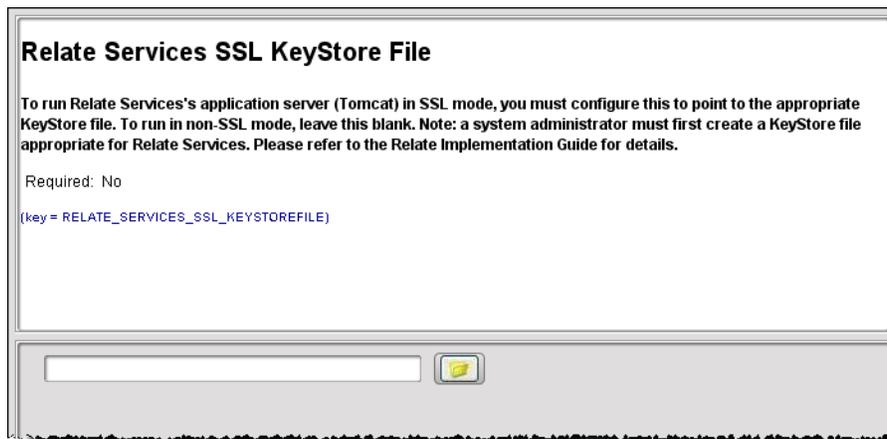


Figure B-4: Relate Services SSL Keystore File Setting

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



Figure B-5: 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-6: 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 55](#)).

**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). Your organization's ID Number should be displayed (see right).
- c.** Close the browser.

**Relate XML API**

Organization ID: 923

## Revision History

| RELATE VERSION    | DATE     | DESCRIPTION OF CHANGE                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|-------------------|----------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 11.4              | Mar 2015 | General proofreading and correction.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| 11.1<br>Doc Ver 2 | Nov 2014 | Corrected SSL certificate creation procedure.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| 11.1              | Oct 2014 | In the "New Installation" chapter, removed the "Licenses" section.<br>In the "Upgrade" chapter, removed the "Licenses" section.                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| 11.0              | Aug 2014 | In the "New Installation" chapter, removed the configuration information that was redundant with the information in the "Initial Configuration" chapter.<br>In the "New Installation" chapter, added the "Licenses" section.<br>In the "Upgrade" chapter, added the "Licenses" section.<br>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<br>Doc Ver 4 | May 2014 | In the Secure Sockets Layer (SSL) appendix, added missing information describing how to import the generated SSL certificate into Java.                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| 10.8<br>Doc Ver 3 | Feb 2014 | In the Secure Sockets Layer (SSL) appendix, corrected description of the <code>-dname</code> command line option to read "Distinguished name".                                                                                                                                                                                                                                                                                                                                                                                                                                  |

| RELATE VERSION    | DATE      | DESCRIPTION OF CHANGE                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|-------------------|-----------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 10.8<br>Doc Ver 2 | Jan 2014  | In the Secure Sockets Layer (SSL) appendix, corrected broken link and removed incorrect information.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| 10.8              | Jan 2014  | <p>Changed the name of the "Enable Secure Sockets Layer (SSL)" chapter to "Secure Sockets Layer (SSL)".</p> <p>In the chapter "Secure Sockets Layer (SSL)", split the procedure "Enabling SSL for Relate" into "Create the SSL Certificate" and "Enable SSL for Relate".</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| 10.5              | Sept 2013 | <p>In the "Manual Installation" chapter, "Database Installation" section, removed all XBR scripts from "Oracle" installation procedure, removed <b>XBR_DETAIL_DAT</b>, <b>XBR_INDEX</b>, <b>XBR_NONDETAIL_DAT</b>, <b>XBR_USER_DAT</b>, <b>XBRCONNECT</b>, <b>XBRUSER</b>, and <b>XBRADMIN</b> database configurations, removed the <b>&amp;FilePWD_xbr_detail</b>, <b>&amp;FilePWD_xbr_index</b>, <b>&amp;FilePWD_xbr_nondetail</b>, and <b>&amp;FilePWD_xbr_user</b> configurations from the <code>01CreateTBS.sql</code> file, removed the <b>&amp;XBRADMINPWD</b> configuration from the <code>02CreateUsers.sql</code> file.</p> <p>In the "Manual Installation" chapter, "Database Installation" section, removed <b>@@XBRADMINUSER@@</b> and <b>@@XBRADMINPASSWD@@</b> variables from "SQL Server" installation procedure.</p> <p>In the "Manual Installation" chapter, "Create the Organization" section, removed the step for configuring Available Modules in Conflate.</p> <p>In the "Upgrade" chapter, "Create the Organization" section, removed the step for configuring Available Modules in Conflate.</p> |
| 10.0              | May 2013  | <p>In the "Introduction" chapter, updated Java installation procedure to reflect upgrade to Java version 1.7.</p> <p>In the "Installation" chapter, updated images to match installer.</p> <p>Separated information about enabling SSL into the "Enable Secure Sockets Layer (SSL)".</p> <p>In the "Initial Configuration" chapter, added information about importing Users.</p> <p>General cleanup and proofreading.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |

| RELATE VERSION | DATE      | DESCRIPTION OF CHANGE                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|----------------|-----------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 9.7            | Sep 2012  | <p>In "Import Users" section of "New Installation" chapter, added COUNTRY_CODE to fields in Users CSV file.</p> <p>Added Tender Activity Reports Export Directory to tables of export directories in both "New Installation" and "Upgrade" chapters.</p> <p>In "Relate Services Setup" section of "Upgrade" chapter, removed step deleting Liferay service.</p> <p>In "Configuration" section of "Update" chapter, added information about configuring the name of the internal deal engine.</p> <p>General cleanup and proofreading.</p> |
| 9.6            | Jun 2012  | <p>Removed section "Prepare Java JRE 1.6 for Relate (Windows)" from "Introduction" chapter.</p> <p>Updated screen captures throughout document.</p> <p>General cleanup and proofreading.</p>                                                                                                                                                                                                                                                                                                                                              |
| 9.5            | Mar 2012  | <p>Installation Chapter:</p> <ul style="list-style-type: none"> <li>■ Removed report installation script from database upgrade procedures.</li> </ul> <p>Initial Configuration Chapter:</p> <ul style="list-style-type: none"> <li>■ Updated Log In procedure to a non-specific username and password.</li> </ul> <p>General cleanup and proofreading.</p>                                                                                                                                                                                |
| 9.0            | Sept 2011 | <p>Entire reworking of the Installation Guide, including the following information:</p> <p>Reorganized information in the chapters.</p> <p>Moved "Add New Organization" and "Users and Roles" chapters to the <i>Relate Configuration Guide</i>.</p> <p>Update document to new format.</p> <p>General cleanup and proofreading.</p>                                                                                                                                                                                                       |

