Installation Guide

iPlanet™ TradingXpert

Version 3.5.1 for Windows NT 4.0 SP5

816-6328-10
July 2002

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TradingXpert System About this Book

This Guide provides instructions for installing the components of iPlanet's TradingXpert System 3.5.1. It includes prerequisites, preinstallation, and postinstallation tasks that you must perform in order to ensure a successful installation.

iPlanet TradingXpert provides companies with a comprehensive software solution for setting up and operating a cost-effective and easy-to-use electronic commerce system that is built upon Internet technologies.

The following topics are covered in this section:

- Before You Begin
- Audience and Roles
- Organization
- Documentation Set
- Conventions

iPlanet TradingXpert is subject to the terms detailed in the license agreement accompanying it.

Before You Begin

Downloading the Latest Version of Any TradingXpert Document

We continuously update the TradingXpert documentation. You can download the latest version from:

http://docs.sun.com/?p=/coll/S1_IntegrationServer_B2B_361

Audience and Roles

This Guide is written for the system administrator who installs and administers TradingXpert.

What You Need to Know

The *iPlanet ECXpert Installation Guide* is written with the assumption that you understand the basics of the operating system on which you are running this software as well as iPlanet ECXpert and the iPlanet Application Server (iAS). In addition, the site administrator must have Administrator privileges.

The documentation also assumes you have the following basic background:

- a general understanding of the Internet and the World Wide Web
- experience in the setup and management of web services
- an understanding of your company's electronic commerce system architecture
- basic knowledge of the NAS architecture and functionality

Note For administrators planning to extend the utility ofTradingXpert by building customized forms, a strong background in Java and NAS is recommended.

Organization

The *iPlanet TradingXpert Installation Guide* is structured as follows:

- Chapter 1, "Preinstallation Tasks," describes system hardware and software requirements and preinstallation planning.
- Chapter 2, "Installing TradingXpert," describes the installation process step by step.
- Chapter 3, "Postinstallation Tasks," describes how to test the system to ensure it is fully operation.
- Appendix A, "TradingXpert Test Data Import Files," describes how to import and delete optional test data provided on the installation disk.

Documentation Set

The following is a list of current iPlanet TradingXpert documentation:

- *iPlanet TradingXpert Installation Guide*
- *iPlanet TradingXpert Administrator's and Developer's Guide*
- Any accompanying Release Notes. (Release Notes contain documentation errata, software patches, and a known bugs list.)

ECXpert and Other Documentation

- *iPlanet ECXpert Administrator's Guide*
- *iPlanet ECXpert Developer's Guide*
- *iPlanet ECXpert Operations Reference Guide*
- *iPlanet ECXpert Installation Guide*
- *iPlanet Application Server (iAS) Overview and Installation Guide*
- *Developing iPlanet Application Server (iAS) Extensions*
- *(Optional) iPlanet iPlanet Application Builder (iAB) 4.0 Installation Guide*

If you are using TradingXpert for electronic data interchange (EDI), the following documentation is also useful:

- the UN/EDIFACT on-line documentation on the World Wide Web at URL http://www.unece.org/trade/untdid/, for detailed information about EDI standards.
- the *Electronic Data Interchange X12 Standards*, for a technical reference on EDI implementation (document no. ASC X12S/95-533, available from the ASC X12 Secretariat, Data Interchange Standards Association, Inc., 1800 Diagonal Road, Suite 200, Alexandria, VA 22314-2852, 703.548.7005), or at: http://www.disa.org.

Conventions

A number of typographic conventions are used throughout this manual to help you recognize special terms and instructions. These conventions are summarized in the following table.

Convention	Meaning	Example
boldface	items on the screen that you manipulate	Click the **Submit** button to save your changes.
	names of keys	Press **Enter** to clear the message.
boldface numbered steps	higher level descriptions of tasks you perform (more detailed instructions follow)	**1. Enter the group information.** Enter the name in the **Group Name** field, and a short description in the **Description** field.
italics	key words, such as terms that are defined in the text	The notices posted on an electronic BBS are called *articles*.
	names of books	For more information, refer to the *iPlanet ECXpert Installation Guide*.
	file names	The associated data is stored in the Dispatcher section of the *ecx.ini* file.
`courier font`	command line input or output	Enter the following command: `ls *.mle`
	text file content (HTML templates, config files)	<TITLE>Password Check</TITLE> <IMG SRC="/ui/icons/hd_svcs.gif">
	code samples	**Syntax** const char* getName() const
square brackets, [...]	In command syntax, items within square brackets are *optional*.	In the following example: nsusrgrp [**-v**] insert [**-l**] **-k** *key arguments* **-r act=***relation action,* **usrid=***ID* | **usrlogin=***login* • **-v** and **-r** are optional. • You may specify either **usrid** or **usrlogin**. • You must substitute valid values for italicized items.
vertical line (|)	In command syntax, items on either side are valid *alternatives*.	
courier italics	In command syntax, items in italics are *not* literals.	
em dash (—)	"none" or "nothing"	**Arguments** —

Chapter

1

Preinstallation Tasks

This section includes information you should know and tasks you must perform before you can install iPlanet TradingXpert 3.5.1.

The following topics are covered in this section:

- Supported Version Combinations of TradingXpert and ECXpert
- Planning Your Configuration
- Installing Supporting Software
- Address Configuration Issues
  Cache Requirements for the User Interface
- TradingXpert Directory Structure

Supported Version Combinations of TradingXpert and ECXpert

TradingXpert 3.5.1 works with ECXpert 3.6.

Planning Your Configuration

Before you begin the installation of TradingXpert, take some time to plan your system configuration relative to ECXpert. TradingXpert works very closely with ECXpert. You may install TradingXpert on the same machine as ECXpert (Figure 1.1), or you may install TradingXpert on a different server (Figure 1.2).

Note When TradingXpert and ECXpert are installed on different servers, both servers *must* be operating on the same platform: Sun Solaris, or Windows NT.

Figure 1.1 TradingXpert and ECXpert on the same machine

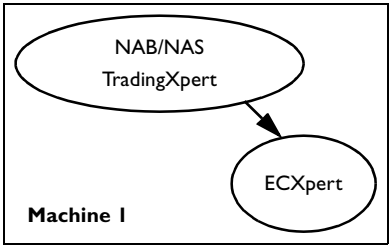
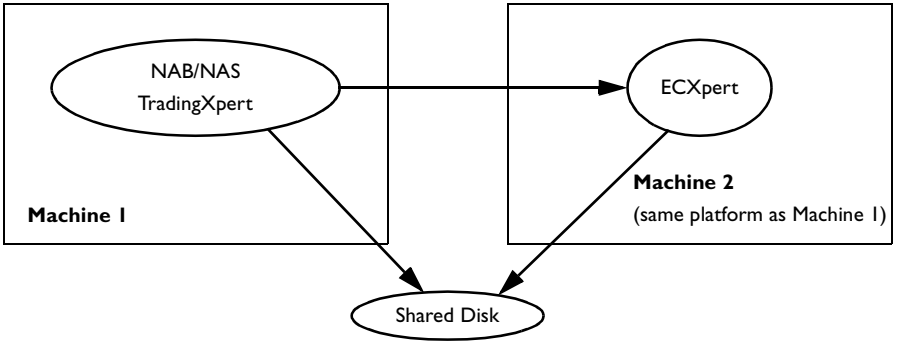


Figure 1.2 TradingXpert and ECXpert on different machines



Installing Supporting Software

Important When you install NAS or NAB, be sure that you are logged on as the ECXpert administrator user—typically "actraadm."

Before you can install TradingXpert 3.5.1, you must first install and configure:

- **Netscape ECXpert 3.0 or 3.0 with Service Pack 1, and Oracle**

  For detailed instructions, see the *iPlanet ECXpert Installation Guide*.

- **Netscape Application Server (NAS), either version 4.0 or 4.0 with Service Pack 2**

  For detailed installation instructions, see "Installing NAS" on page 18.

  For detailed instructions for installing NAS as part of the optional Netscape Application Builder (NAB) installation, see "Installing NAB" on page 41.

- **Netscape Application Server (NAS) ECXpert Extension**

  For detailed instructions on installing the NAS ECXpert extension—as well as the Netscape Extension Builder (NEB) Runtime Layer necessary to use it—and the TradingXpert application in one step, see "Installing the ECXpert Extension to NAS and TradingXpert Together" on page 32 or "Installing the ECXpert Extension to NAS and TradingXpert Together" on page 54.

  For detailed instructions on installing the extension separately, see "Installing the ECXpert Extension to NAS Separately" on page 33 or "Installing the ECXpert Extension to NAS Separately" on page 55.

- **(Optional) Netscape Application Builder (NAB), version 4.0**

  NAB is a development tool for enterprise-class Internet applications that run on NAS. NAB 4.0 includes NAS 4.0.

  For detailed installation instructions, see "Installing NAB" on page 41.

Address Configuration Issues

Depending on how your system is configured, you will have to perform certain tasks as part of installing TradingXpert 3.5.1. Use the information in Table 1.1 to determine which steps you must perform.

Note Throughout this table, *<NASDIR>* represents the directory under which iPlanet Application Server (iAS) is installed, and *<NSBASE>* represents the directory under which ECXpert is installed.

Table 1.1 Configuration Issues

If...	Then you must...
TradingXpert and ECXpert will reside on **the same** machine	See "Installing TradingXpert Separately" on page 34 or "Configuring TradingXpert with NAB" on page 58 for details of these tasks: • Share the ECXpert configuration file with NAS by making sure BDGHOME points to the *<NSBASE>\NS-apps\ECXpert* directory.
TradingXpert and ECXpert will reside on **different** machines	See "Installing TradingXpert Separately" on page 56 for details of these tasks: • Map drives on the two machines so that the same drive letter may be used the same way on both systems. • Make changes in the ECXpert configuration file as specified in "Installing TradingXpert Separately" on page 56. • Copy the ECXpert configuration file to TradingXpert. • Make sure that the user you log on as when you administer TradingXpert has `administrator` privileges.
TradingXpert and **Oracle** will reside on **different** machines.	• Install Oracle client software on the local TradingXpert machine. This is necessary because TradingXpert must have access to all Oracle client libraries. See your Oracle documentation for instructions for installing the Oracle client software.

Cache Requirements for the User Interface

For the optimum performance of the TradingXpert user interface, we recommend that users maintain their web browser's default disk cache and memory cache sizes.

The default disk cache and memory cache sizes for Netscape Communicator 4.6.1 NT are each 1024 KB.

TradingXpert Directory Structure

The directory structure created in the TradingXpert install process is diagrammed in Figure 1.3.

Figure 1.3 TradingXpert directory structure

Directory	Description
<*NASDIR*>\Apps\Fx	The directory in which TradingXpert is installed
FX.gxm	NAB project file for TradingXpert 3.5.1
FX.gxr	NAS registration info file for TradingXpert 3.5.1
common	Core Java files (avoid modifying these), *FXproperties* file, and `txsetpasswd` utility
document	Document-related Java files
unsubmitted	Temporary directory in which TradingXpert works
events	Event-related Java files
forms\en_us	Form-related files
default	Default templates, order and rules files
from_scratch_data	Default data for documents from scratch
login	Login-related Java files
maps_etc	Map-related files
Customization	cinfo templates
import	Optional import data files for adding or deleting memberships, partnerships, and service lists for the test scenario
map_sources	Zip files of all map source files
maps\Nt	Default map files
newmember	Optional login page with new member self-registration
reports	Actuate Report-related files
DocumentStatus.rox	Executable to generate optional document status reports in Actuate
source	
DocumentStatus.rod	Source file for DocStatus.rox
sampledata	Sample data files

Directory	Description
profile	Profile-related Java files
templates\en_us	NAS templates
document	
error.html	
events	
inbound	
login	
messages.txt	
outbound	
profile	
tradeCenter	
tradeCenter	TradeCenter-related Java files
web\en_US	Static HTML files (will be copied to the NAS HTTP docs directory)
banner	
events.html	Event Login page
frameset.html	
help.html	
images	
menu	
help	
index.html	
javascript	
menu	
styles	tradingxpert.css file

Chapter

2

Installing TradingXpert

This chapter describes how to install, configure, and test the components of the iPlanet TradingXpert Version 3.5.1 with NAS and NAB.

The following topics are discussed in this section:

- Installing iPlanet TradingXpert with Netscape Application Server (NAS)
- Installing TradingXpert Separately
- Installing iPlanet TradingXpert with Netscape Application Builder (NAB)
- Configuring TradingXpert with NAB
- Configuring TradingXpert on a Different Machine from ECXpert
- Migrating from TradingXpert 3.0 to 3.5.1

Installing iPlanet TradingXpert with Netscape Application Server (NAS)

Note If you will be installing Netscape Application Builder (NAB) 4.0, which includes a development copy of NAS 4.0, skip to "Installing iPlanet TradingXpert with Netscape Application Builder (NAB)" on page 40.

Important Install all TradingXpert modules as the same user who installed ECXpert and the Netscape Enterprise Server (NES) instance associated with NAS.

Recommendation Wherever the choice of file or path names is left to you, avoid using names that include spaces (e.g., use "ProgramFiles" instead of "Program Files").

Install the TradingXpert modules in the following order:

1. **Netscape Application Server (NAS)**

   For detailed installation instructions, see "Installing NAS" on page 18.

2. **Netscape Application Server (NAS) ECXpert Extension**

   For detailed instructions on installing the NAS ECXpert extension—as well as the Netscape Extension Builder (NEB) Runtime Layer necessary to use it—and the TradingXpert application in one step, see "Installing the ECXpert Extension to NAS and TradingXpert Together" on page 32.

   For detailed instructions on installing the extension separately, see "Installing the ECXpert Extension to NAS Separately" on page 33.

3. **iPlanet TradingXpert**

   For detailed instructions on installing the NAS ECXpert extension and the TradingXpert application in one step, see "Installing the ECXpert Extension to NAS and TradingXpert Together" on page 32.

   For detailed instructions on installing the TradingXpert application separately, see "Installing TradingXpert Separately" on page 56.

Installing NAS

Note iPlanet Application Server (iAS) must be installed by the same user who installed ECXpert and the Netscape Enterprise Server (NES) instance associated with NAS.

1. **Log on using the ECXpert Administrator userid, generally "actraadm."**

2. **Insert the NAS 4.0 CD-ROM in your system's CD-ROM drive.**

   Use the CD-ROM in your NAS 4.0 package.

3. **Run the installation script.**

   Open a Command Prompt window and enter the following command:

   `<CDDRIVE>:\<NAS_install_directory>\setup.exe`

   where *<CDDRIVE>* is the drive letter of your CD drive and *<NAS_install_directory>* is the installation directory specified in your NAS 4.0 documentation (e.g., *E:\NT*).

   Figures 2.1-2.25 show each installation screen. When you are prompted for information, enter the values shown in the corresponding figure.

Note For more detailed information about each installation screen, as well as other issues related to installation, refer to the *iPlanet Application Server (iAS) 4.0 Overview and Installation Guide* included with NAS 4.0.

Next Step Once the script has successfully completed, continue to either "Installing the ECXpert Extension to NAS Separately" on page 33 or "Installing the ECXpert Extension to NAS and TradingXpert Together" on page 32.

Figure 2.1 Netscape Server Products Setup Program, initial screen

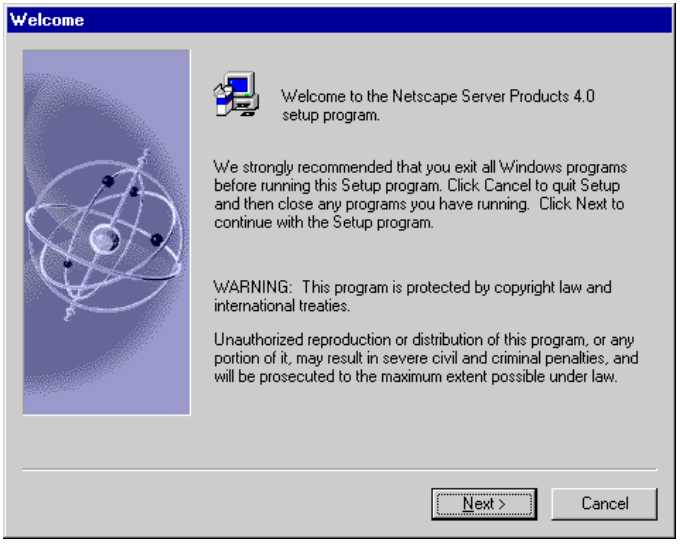


Figure 2.2 Netscape Server Products Setup Program (Continued)

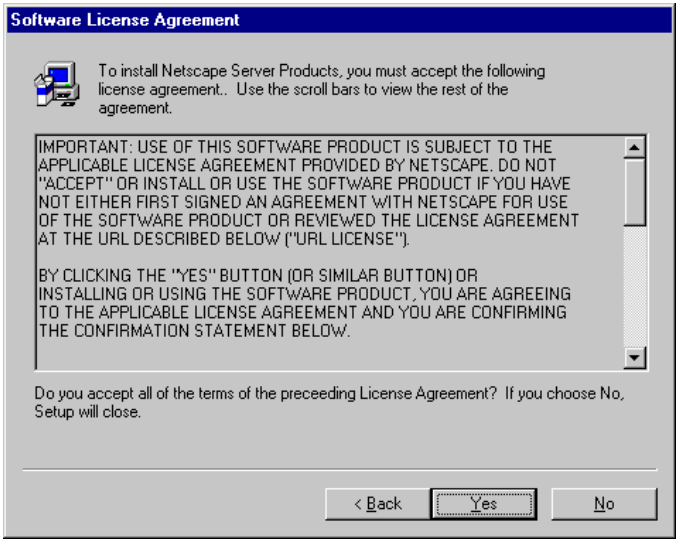


Figure 2.3 Netscape Server Products Setup Program (Continued)

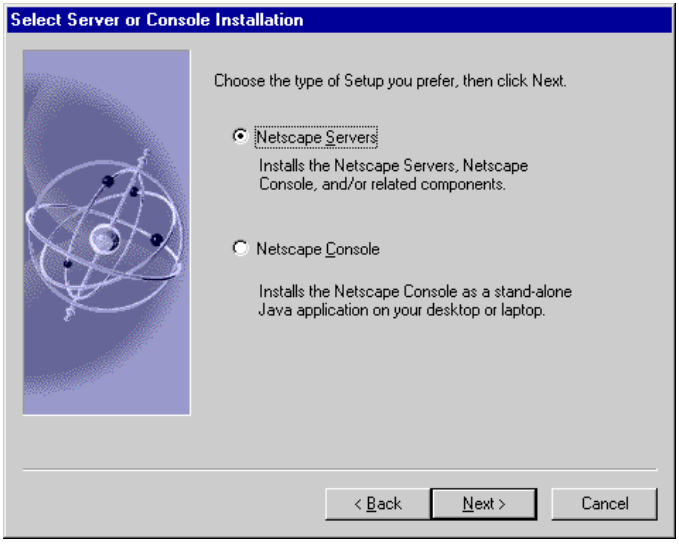


Figure 2.4 Netscape Server Products Setup Program (Continued)

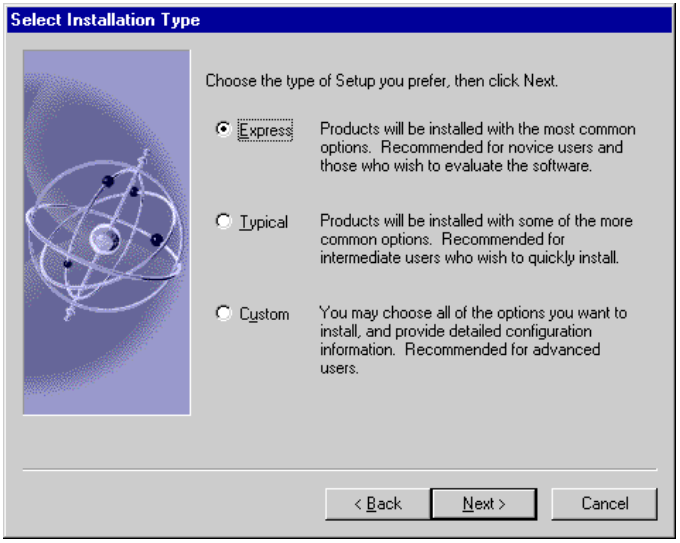
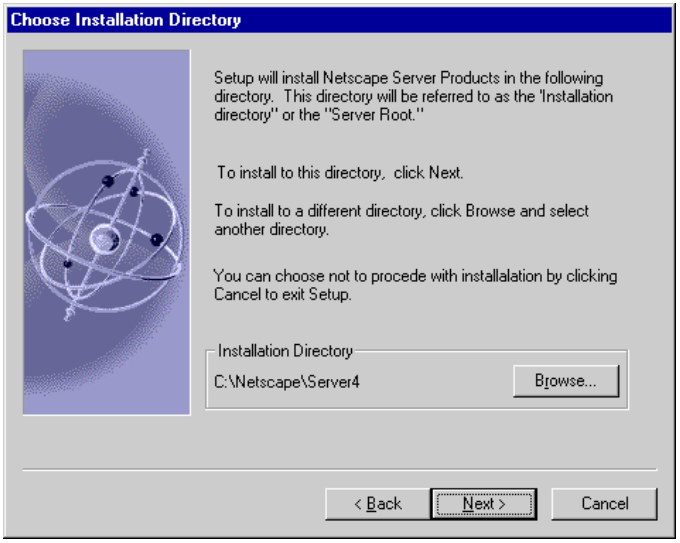


Figure 2.5 Netscape Server Products Setup Program (Continued)



Note In Figure 2.5, the Installation Directory can be any directory you choose.

Figure 2.6 Netscape Server Products Setup Program (Continued)

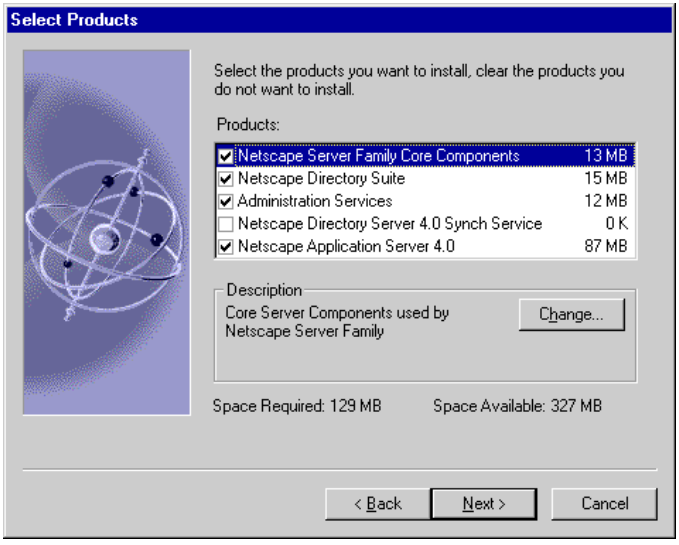
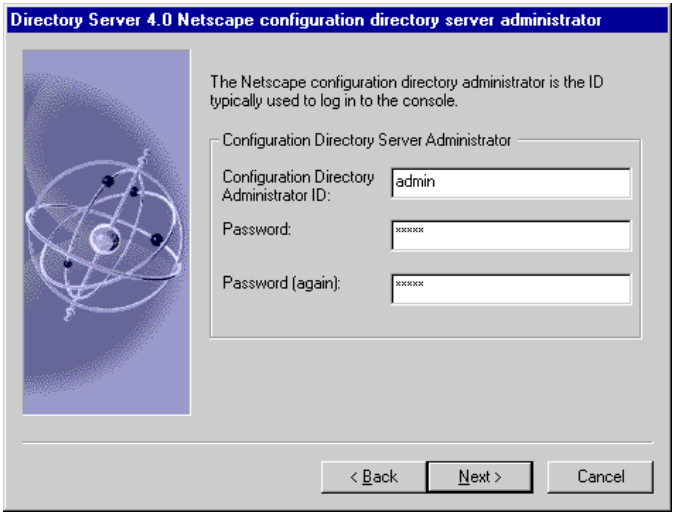


Figure 2.7 Netscape Server Products Setup Program (Continued)



Note The Configuration Directory Server Administrator in Figure 2.7 can be any administrator user.

Figure 2.8 Netscape Server Products Setup Program (Continued)

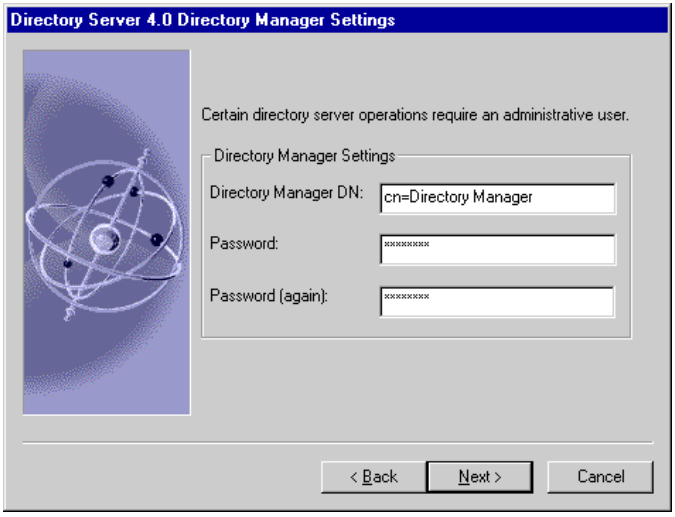


Figure 2.9 Netscape Server Products Setup Program (Continued)

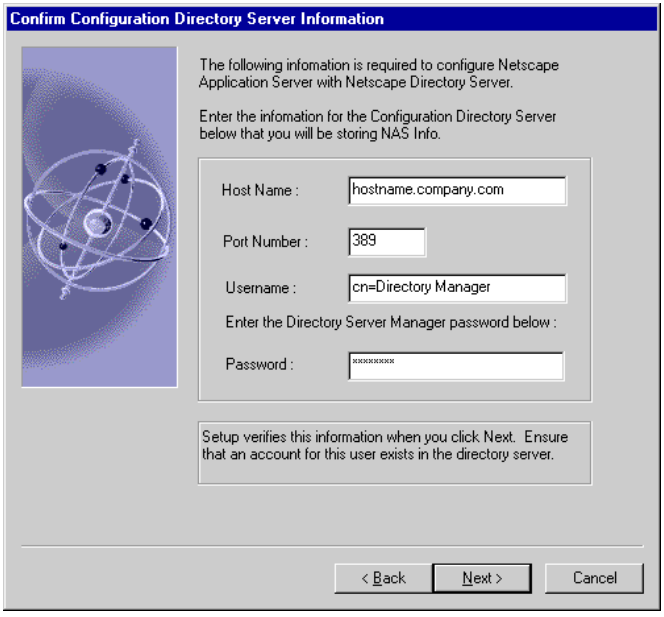


Figure 2.10 Netscape Server Products Setup Program (Continued)

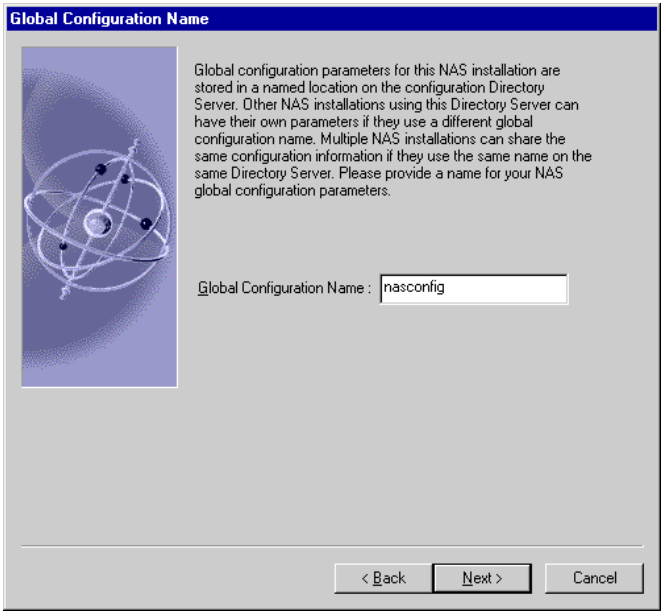


Figure 2.11 Netscape Server Products Setup Program (Continued)

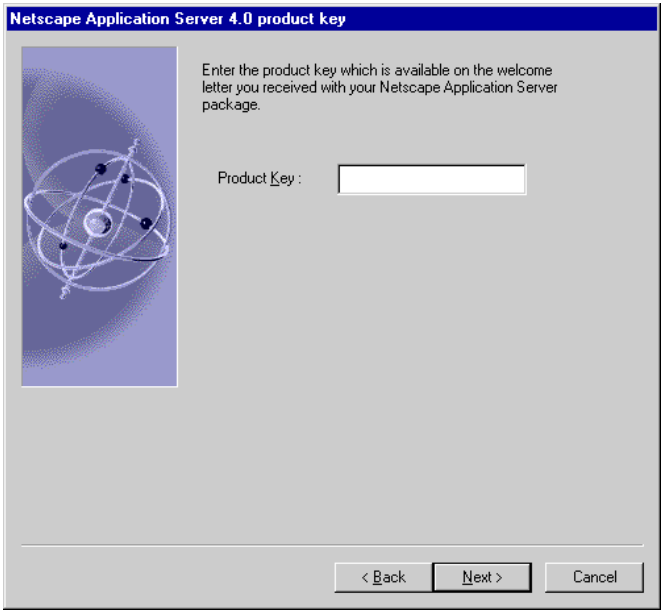


Figure 2.12 Netscape Server Products Setup Program (Continued)

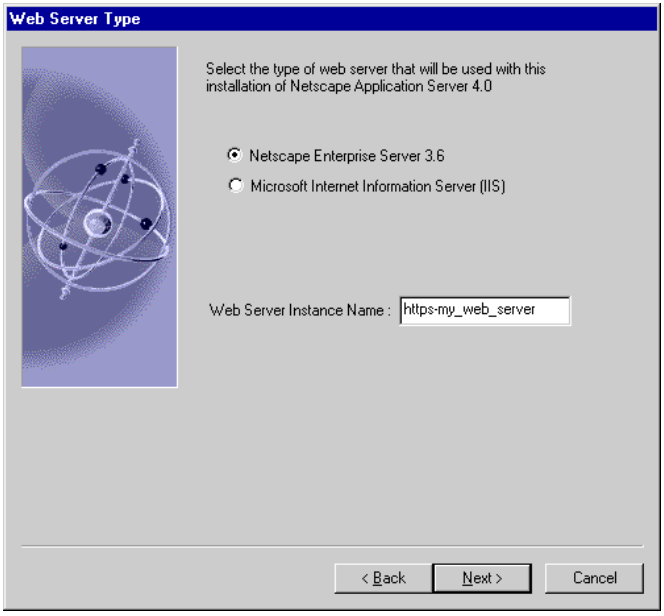


Figure 2.13 Netscape Server Products Setup Program (Continued)

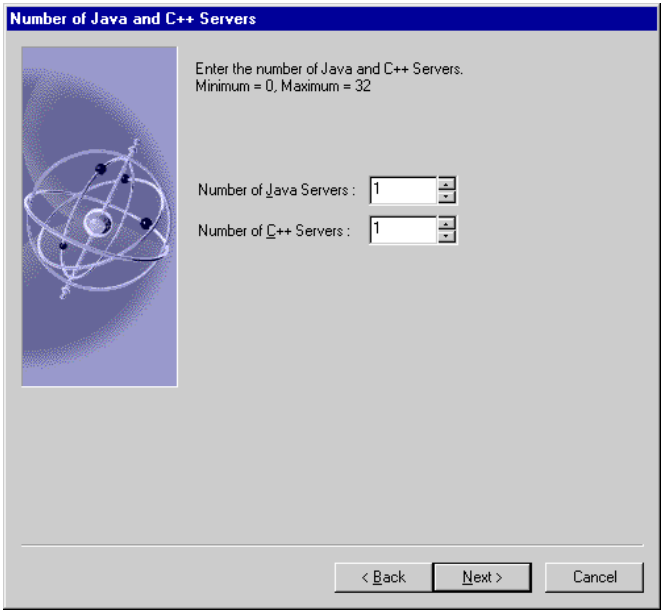


Figure 2.14 Netscape Server Products Setup Program (Continued)

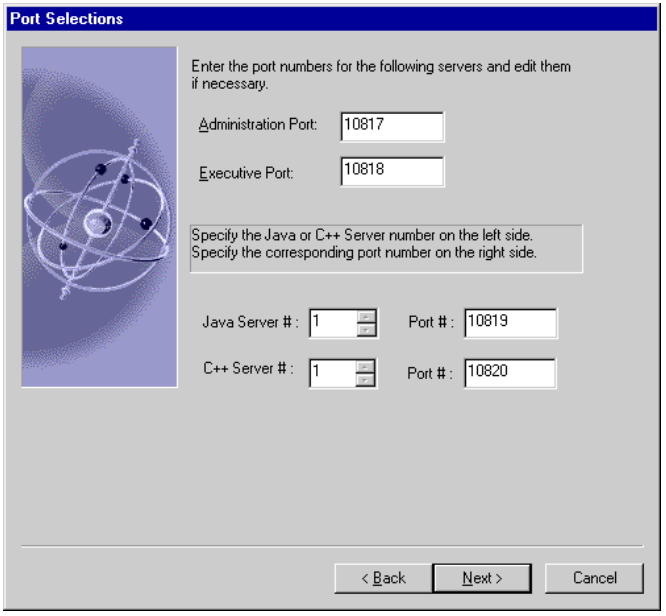


Figure 2.15 Netscape Server Products Setup Program (Continued)

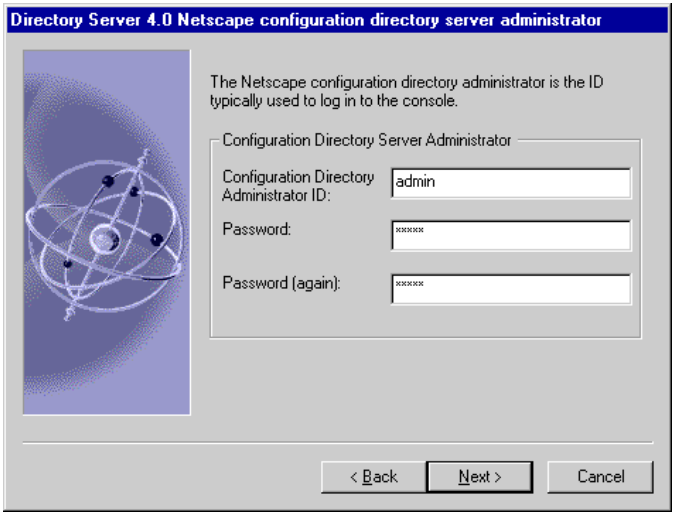


Figure 2.16 Netscape Server Products Setup Program (Continued)

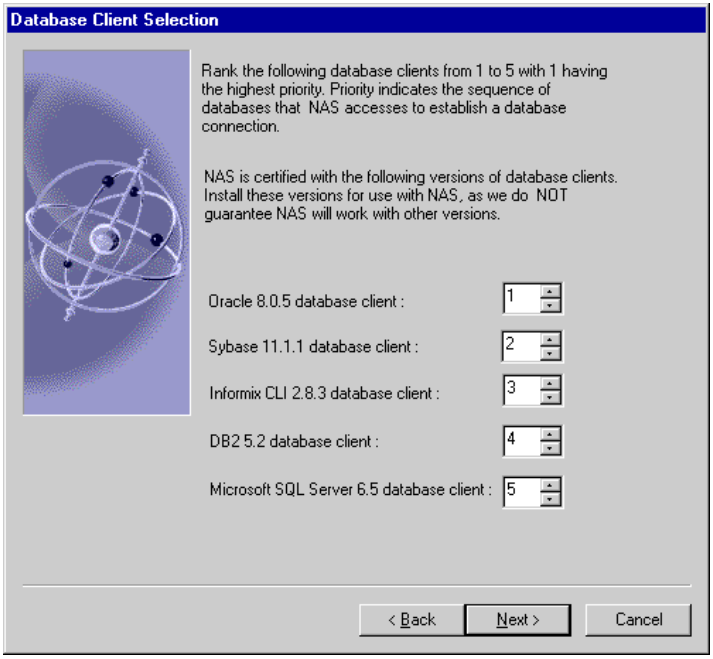
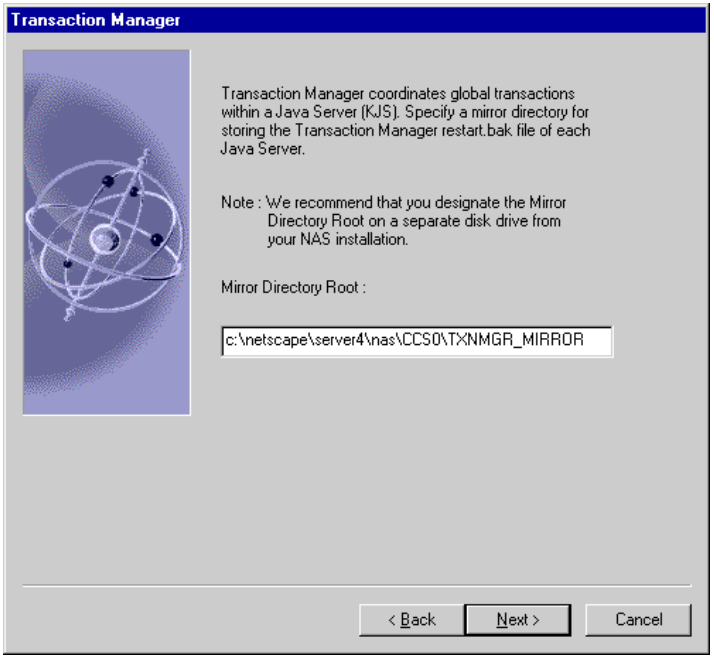


Figure 2.17 Netscape Server Products Setup Program (Continued)



Note In Figure 2.17, the Mirror Directory Root can be any directory you choose. If the directory you specify does not exist, you will be prompted to create it (Figure 2.18).

Figure 2.18 Netscape Server Products Setup Program (Continued)

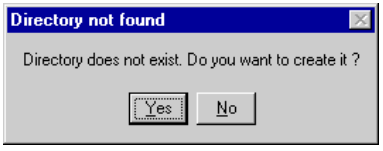


Figure 2.19 Netscape Server Products Setup Program (Continued)

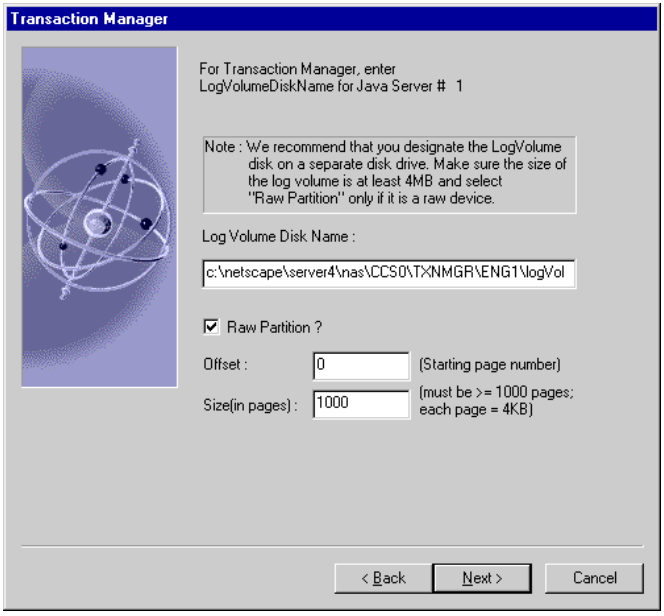


Figure 2.20 Netscape Server Products Setup Program (Continued)

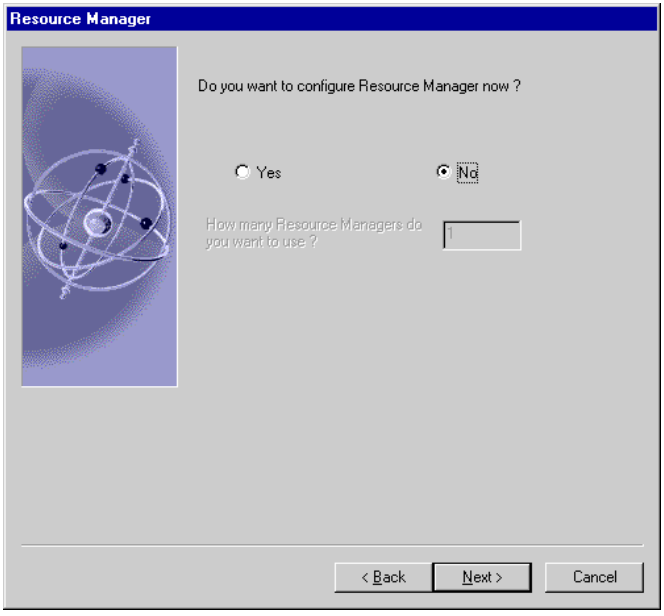


Figure 2.21 Netscape Server Products Setup Program (Continued)

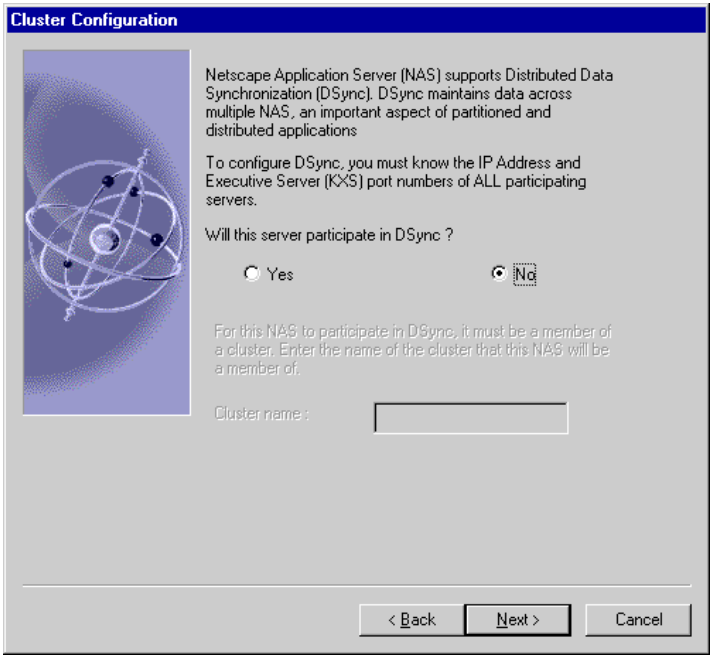
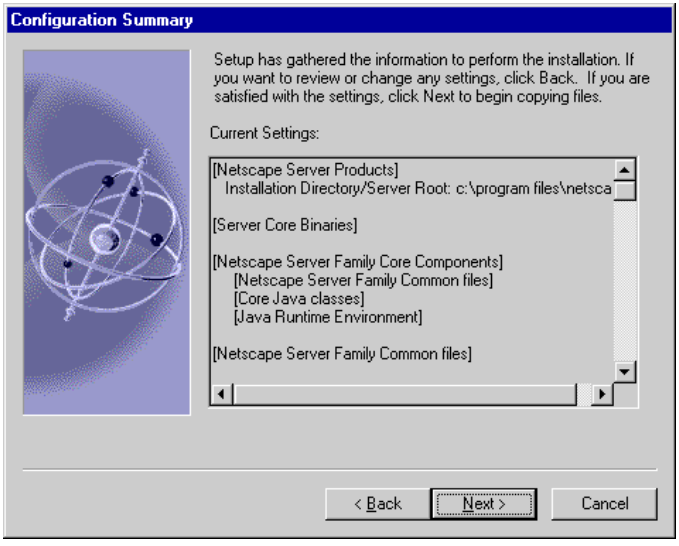


Figure 2.22 Netscape Server Products Setup Program (Continued)



Note As you begin copying files to the new installation directories, Figures 2.23-2.25 will appear.

Figure 2.23 Netscape Server Products Setup Program (Continued)

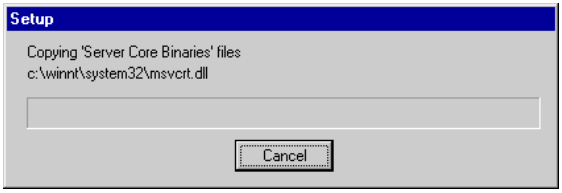


Figure 2.24 Netscape Server Products Setup Program (Continued)

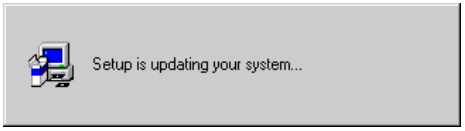


Figure 2.25 Netscape Server Products Setup Program (Continued)

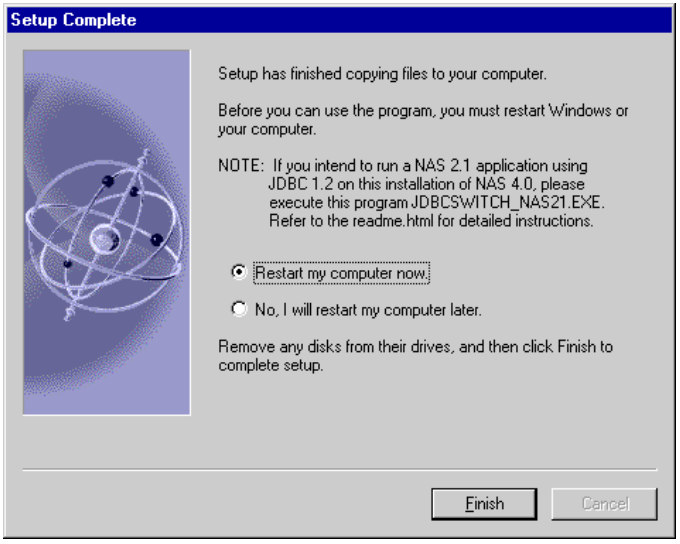


Figure 2.26

Installing the ECXpert Extension to NAS and TradingXpert Together

The installation disk includes a script that installs both the NAS ECXpert Extension and the TradingXpert application in one step.

Note If you choose to install the NAS ECXpert Extension and TradingXpert application separately, skip this section and proceed with "Installing the ECXpert Extension to NAS Separately" on page 33 and "Installing TradingXpert Separately" on page 56.

Follow these steps to install both the NAS ECXpert Extension and the TradingXpert application:

1. **Log in as the same user under which you installed NAS.**

2. **Make sure Netscape Directory Server is running.**

   When you install NAS 4.0, the installation starts Directory Server for you. By default, Directory Server is also started automatically when the machine is restarted.

   — From the Control Panel, double-click the **Services** icon.

   — Select the **Netscape Directory Server**.

   — If the Netscape Directory Server is not started, click **Start**.

3. **Enable the Netscape Extension Builder (NEB) Runtime Layer.**

   The NEB Runtime Layer, by default, is disabled in a new NAS installation. To enable it, modify <*NASDIR*>*bin**ketrt.gxr* so `enable=y` in all four sections.

   ```
   Extension ExtensionData-ExtensionData:loadpriority=0:enable=y
   ...
   Extension JavaExtData-JavaExtData:loadpriority=0:enable=y
   ...
   Extension LockManager-LockManager:loadpriority=0:enable=y
   ...
   Extension RLOPManager-RLOPManager:loadpriority=0:enable=y
   ```

4. **Register the ECXpert Extension with NAS.**

   Open a Command Prompt window and enter the following command:

   ```
   <NASDIR>\bin\kreg.exe < ketrt.gxr
   ```

5. **Run the installation script.**

   In a Command Prompt window, enter the following command:

   `<CDDRIVE>:\tradingxpert\install_all.bat <NASDIR>`

   where <*CDDRIVE*> is the drive letter of your CD drive and <*NASDIR*> is the directory in which NAS is installed, for example,

   ```
   e:\tradingxpert\install_all.bat c:\netscape\server4\nas\
   ```

   This script will verify that the specified NAS directory is valid and will create subdirectories, if needed, in your <*NASDIR*>*Apps* directory.

   It will then install the NAS ECXpert Extension in the <*NASDIR*>*Apps**ecx* directory, and add files and subdirectories for the TradingXpert application under the <*NASDIR*>*Apps* directory.

Next Step After installation is complete, configure the TradingXpert application. For detailed instructions, see "Installing TradingXpert Separately" on page 34.

Note If you use the *install_all.bat* script, you do not need to run the separate *extension**setup_nt.bat* and *application**setup_nt.bat* scripts to install the NAS ECXpert Extension or the TradingXpert application. Skip "Installing the ECXpert Extension to NAS Separately" on page 33 and "Installing TradingXpert Separately" on page 56.

Installing the ECXpert Extension to NAS Separately

Note If you choose to install the NAS ECXpert Extension and the TradingXpert application in one step, per the instructions in "Installing the ECXpert Extension to NAS and TradingXpert Together" on page 32, skip this section.

If you choose to install the ECXpert Extension to NAS separately from the TradingXpert application, follow these steps:

1. **Log in as the same user under which you installed NAS.**

2. **Make sure Netscape Directory Server is running.**

   When you install NAS 4.0, the installation starts Directory Server for you. By default, Directory Server is also started automatically when the machine is restarted.

   — From the Control Panel, double-click the **Services** icon.

   — Select the **Netscape Directory Server**.

— If the Netscape Directory Server is not started, click **Start**.

3. **Enable the Netscape Extension Builder (NEB) Runtime Layer.**

   The NEB Runtime Layer, by default, is disabled in a new NAS installation. To enable it, modify <*NASDIR*>*bin**ketrt.gxr* so `enable=y` in all four sections.

```
Extension ExtensionData-ExtensionData:loadpriority=0:enable=y
...
Extension JavaExtData-JavaExtData:loadpriority=0:enable=y
...
Extension LockManager-LockManager:loadpriority=0:enable=y
...
Extension RLOPManager-RLOPManager:loadpriority=0:enable=y
```

4. **Register the ECXpert Extension with NAS.**

   Open a Command Prompt window and enter the following command:

   <*NASDIR*>\bin\kreg.exe < ketrt.gxr

5. **Run the installation script.**

   In a Command Prompt window, enter the following command:

   <*CDDRIVE*>:\tradingxpert\extension\setup_nt.bat <*NASDIR*>

   where <*CDDRIVE*> is the drive letter of your CD drive (e.g., *E*) and <*NASDIR*> is the directory in which NAS is installed, for example,

```
e:\tradingxpert\extension\setup_nt.bat
  c:\netscape\server4\nas\
```

   This script installs the NAS ECXpert Extension in the <*NASDIR*>*Apps**ecx* directory.

Next Step After installation is complete, install the TradingXpert application. For detailed instructions, see "Installing TradingXpert Separately" on page 56.

Installing TradingXpert Separately

Note If you choose to install the NAS ECXpert Extension and the TradingXpert application in one step, per the instructions in "Installing the ECXpert Extension to NAS and TradingXpert Together" on page 32, skip this section.

Warning The NAS ECXpert Extension must be installed before you continue. Refer to "Installing the ECXpert Extension to NAS Separately" on page 33 for detailed installation instructions.

If you choose to install the TradingXpert application separately from the ECXpert Extension to NAS, follow these steps:

1. **Log in as the same user under which you installed NAS.**

2. **Make sure Netscape Directory Server is running.**

   When you install NAS 4.0, the installation starts Directory Server for you. By default, Directory Server is also started automatically when the machine is restarted.

   — From the Control Panel, double-click the **Services** icon.

   — Select the **Netscape Directory Server**.

   — If the Netscape Directory Server is not started, click **Start**.

3. **Insert the TradingXpert CD-ROM in your system's CD-ROM drive.**

4. **Install the NAS ECXpert Extension, if you have not yet done so.**

   Refer to "Installing the ECXpert Extension to NAS Separately" on page 33 for detailed installation instructions.

5. **Run the TradingXpert installation script.**

   Open a Command Prompt window and enter the following command:

   ```
   <CDDRIVE>:\tradingxpert\application\setup_nt.bat
     <NASDIR>
   ```

   where <*CDDRIVE*> is the drive letter of your CD drive (e.g., *E)* and <*NASDIR*> is the directory in which NAS is installed, for example:

   ```
   e:\tradingxpert\application\setup_nt.bat
     c:\netscape\server4\nas\
   ```

   The script then creates subdirectories under the <*NASDIR*>*APPS* directory and copies files into these subdirectories. It also registers all the applogics with NAS.

Next Step After installation is complete, configure the TradingXpert application. For detailed instructions, see "Installing TradingXpert Separately" on page 34.

Configuring TradingXpert with NAS

This section provides detailed instructions for configuring the components of your TradingXpert System when you are using it with NAS.

Note If TradingXpert and ECXpert are installed on different machines, you will *also* need to follow the additional instructions in "Configuring TradingXpert on a Different Machine from ECXpert" on page 63.

1. **Create a directory named TX under your NAS HTTP document directory.**

   The NAS HTTP primary document directory is specified when you install the Netscape Enterprise Server (NES) instance associated with NAS.

   For example, if NES is installed in *c:\netscape\SuiteSpot*, your new directory might be *c:\netscape\SuiteSpot\docs\TX*.

2. **Copy the files from *<NASDIR>\Apps\Fx\web* directory to the TX directory.**

   Copy all the files from your *<NASDIR>\Apps\Fx\web* directory to the TX directory you just created under your NAS HTTP docs directory.

3. **Set up the account under which NAS will be started.**

   — From the Control Panel, double-click **Services**.

   — Select the **Netscape Application Server**.

   — Check **Startup** to open the Service dialog.

   — Select the account under which NAS will be started.

4. **(Optional) Set up NAS to display debug messages.**

Note This step requires you to log in to NAS using the System Account rather than as a user account.

NAS and TradingXpert produce debug messages. In order to see these messages, you must give the Netscape Application Server service permission to interact with the desktop. Follow the steps below to do this.

— From the Control Panel, double-click **Services**.

— Select the **Netscape Application Server**.

— Check **Startup** to open the Service dialog.

— Check **Allow Service to Interact with Desktop**.

— Click **OK** to close the Service dialog and return to the Services dialog, with the Netscape Application Server still selected.

— Click **Stop** to stop NAS.

— Click **Start** to restart NAS—debugging messages are now displayed in a Command Prompt window.

When you no longer want to view NAS debugging messages, repeat the steps above, *un*checking **Allow Service to Interact with Desktop** and restoring the login account to its previous value.

5. **Verify that BDGHOME is set to the *<NSBASE>\NS-apps\ECXpert* directory.**

Note If TradingXpert and ECXpert are installed on different machines, skip this step and follow Step 4 in "Configuring TradingXpert on a Different Machine from ECXpert" on page 63.

NAS uses the ECXpert configuration file. Follow these steps to verify that NAS can find the file:

— In the Control Panel of the machine on which ECXpert is installed, double-click the **System** icon, then click the **Environment** tab.

— Verify the value of *BDGHOME*.

Make sure the *BDGHOME* variable has the value

<NSBASE>\NS-apps\ECXpert

where ***<NSBASE>*** is the ECXpert installation directory.

NAS will then use the same *ecx.ini* file that ECXpert uses.

Note If NAS is started using the System Account (see Step 3), you will have to add *BDGHOME* to the **System Variables** section rather than to the **User Variables** section.

Note If the BDGHOME variable is not listed but ECXpert is installed and operational on this machine, it is possible that ECXpert was installed under a different user login. *All three components—ECXpert, NAS, and TradingXpert—must be installed as the same user.*

6. **Verify that the `ORACLE_HOME` and `ORACLE_SID` environment variables are set.**

   ECXpert requires these variables, which are used by Oracle, to interact with the Oracle database. They may be in either the **System Variables** or **User Variables** list on the **Environment** tab.

   This is a redundant step: if ECXpert is operating correctly, it is certain that these environment variables are set correctly.

7. **If you made any changes in the Environment tab, restart the system.**

   This is necessary for changes in environment variable settings to take effect.

8. **Modify *<NASDIR>\Apps\Fx\common\FXproperties* as follows.**

Note In the *FXproperties* file, the backslash (\) separating levels in a file system path must always be entered twice.

```
# root dir
FX.rootdir: <NASDIR>\\Apps\\Fx
```

Edit `FX.rootdir` to point to the TradingXpert directory under which directories like *common*, *document*, and *events* appear (e.g., *c:\\netscape\\server4\\nas\\Apps\Fx*).

```
# Base HREF
FX.basehref: http://<hostname>:<port>/<base>/
```

Edit `FX.basehref` to point to the base URL that you type to get to TradingXpert login screen, e.g., *http://host.company.com:5555/TX/*. Please note that the URL ends with a slash.

```
# Debugging flag
FX.debug: true
```

`FX.debug`, when set to true, prints a large number of messages to *kjs* logs to enable you to debug problems easily. Set this to false in a production environment.

```
# Location of ini file
FX.ecxini.file: <NSBASE>\\NS-Apps\\ECXpert\\config\\ecx.ini
```

Edit `FX.ecxini.file` to point to the path to the *ecx.ini* file. This file should be in the *config* subdirectory of the directory designated as `BDGHOME`.

```
# session timeout value in minutes. Change to 30 for production
FX.session.timeout: 8
```

`FX.session.timeout` is the number of minutes between the last user interaction and the TradingXpert session timeout. If TradingXpert times out, the user will be requested to log in again. We recommend you set this value to 30 in a production environment.

```
# Set this to true if remote submission is to be used.
FX.remoteSubmission: false
```

If both TradingXpert and ECXpert are on a single machine, `FX.remoteSubmission` should be set to false. If TradingXpert is set up in a remote client configuration, with ECXpert on one machine and TradingXpert on a different machine, `FX.remoteSubmission` should be set to true (see Step 14 in "Configuring TradingXpert with NAB" on page 58).

```
# Prefix to be added to filenames when ECX is on remote machine
# For example, /h/ECXmachine is the mountpoint for ECX disk
# on TradingXpert machine. This is used ONLY if remoteSubmission
# is set to true
FX.remoteECXPathPrefix:
```

Leave the ECX path prefix value empty (i.e., `FX.remoteECXPathPrefix:` - nothing following the colon).

Note To synchronize your ECXpert system with your TradingXpert on a remote machine, you must *also* select a drive letter and map it the same way on the two systems. See Step 9 of "Configuring TradingXpert on a Different Machine from ECXpert" on page 63 for details.

The remainder of this file does not need to be edited unless you are using any of the optional features outlined in the *iPlanet TradingXpert Administrator's and Developer's Guide*. It is configured to work with TradingXpert as installed.

9. **Stop and restart NAS.**

   — Go to Control Panel and double-click on the **Services** icon.

   — Select **Netscape Application Server** and click **Stop**.

   — Select **Netscape Application Server** and click **Start**.

Important Make sure that NAS is started as the ECXpert administrator user, usually `actraadm`.

10. **Start up TradingXpert.**

    To access TradingXpert, use your browser to go to the following URL:

    http://<*hostname*>:<*port*>/<*base*>

Installing iPlanet TradingXpert with Netscape Application Builder (NAB)

Follow the instructions in this section only when your installation will include Netscape Application Builder (NAB) 4.0, which includes a development copy of NAS 4.0. If you will be installing NAS without NAB, follow the instructions in "Installing iPlanet TradingXpert with Netscape Application Server (NAS)" on page 18.

Important Install all TradingXpert modules as the same user who installed ECXpert and the Netscape Enterprise Server (NES) instance associated with NAB.

Recommendation Wherever the choice of file or path names is left to you, avoid using names that include spaces (e.g., use "ProgramFiles" instead of "Program Files").

Install the TradingXpert modules in the following order:

1. **Netscape Application Builder (NAB), version 4.0**

   NAB 4.0 includes a development version of Netscape Application Server (NAS) 4.0.

   For detailed installation instructions, see "Installing NAB" on page 41.

2. **Netscape Application Builder (NAS) ECXpert Extension**

   For detailed instructions on installing the NAS ECXpert extension—as well as the Netscape Extension Builder (NEB) Runtime Layer necessary to use it—and the TradingXpert application in one step, see "Installing the ECXpert Extension to NAS and TradingXpert Together" on page 54.

For detailed instructions on installing the extension separately, see "Installing the ECXpert Extension to NAS Separately" on page 55.

3. **iPlanet TradingXpert**

   For detailed instructions on installing the NAS ECXpert extension and the TradingXpert application in one step, see "Installing the ECXpert Extension to NAS and TradingXpert Together" on page 54.

   For detailed instructions on installing the application separately, see "Installing TradingXpert Separately" on page 56.

Installing NAB

Note NAB must be installed by the same user who installed ECXpert and the Netscape Enterprise Server (NES) instance associated with NAB.

To install NAB 4.0, as well as the development copy of Netscape Application Server (NAS) 4.0 included with it, follow these steps:

1. **Log on using the ECXpert Administrator userid, generally "actraadm."**

2. **Insert the NAB 4.0 CD-ROM in your system's CD-ROM drive.**

   Use the CD-ROM in your NAB 4.0 package.

3. **Open a Command Prompt window and run the installation script.**

   In the Command Prompt window, enter the following command:

   ***<CDDRIVE>*:*<NAB_install_directory>*\setup.exe**

   where *<CDDRIVE>* is the drive letter of your CD drive and *<NAB_install_directory>* is the installation directory specified in your NAB 4.0 documentation (e.g., *E:\NT*).

   Figures 2.27-2.51 show each installation screen. When you are prompted for information, enter the values shown in the corresponding figure.

Note For more detailed information and issues related to installation, refer to the documentation included with NAB.

Next Step Once the script has successfully completed, continue to either "Installing the ECXpert Extension to NAS and TradingXpert Together" on page 54 or "Installing the ECXpert Extension to NAS Separately" on page 55.

Figure 2.27 Netscape Application Builder and Server Setup Program, initial screen

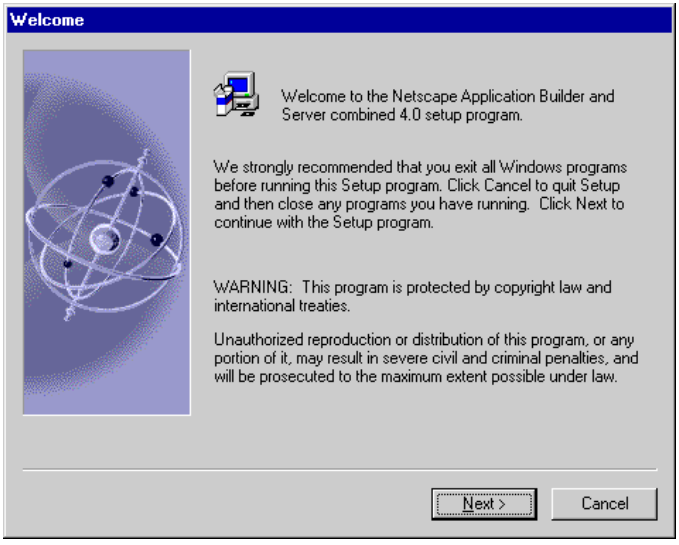


Figure 2.28 Netscape Application Builder and Server Setup Program (Continued)

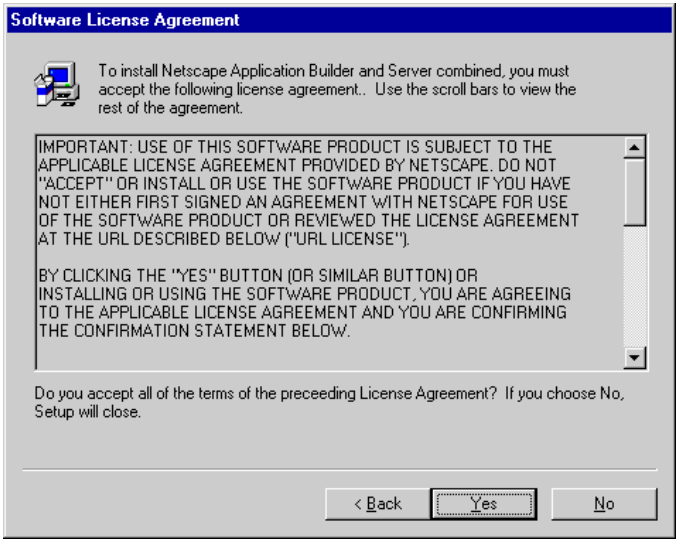


Figure 2.29 Netscape Application Builder and Server Setup Program (Continued)

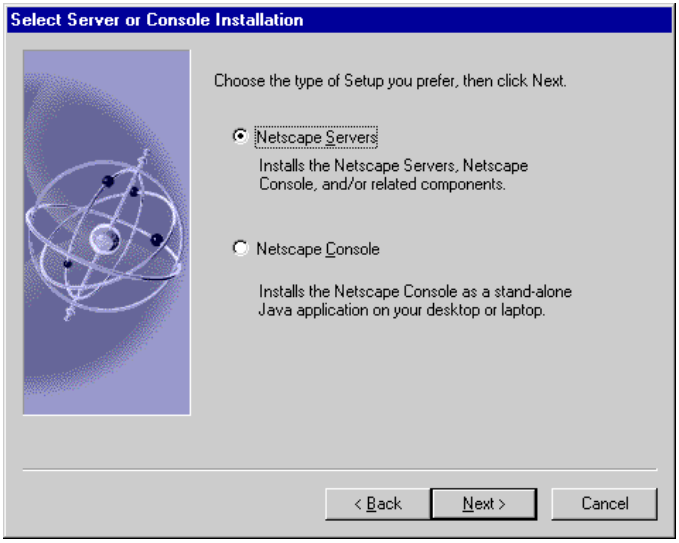


Figure 2.30 Netscape Application Builder and Server Setup Program (Continued)

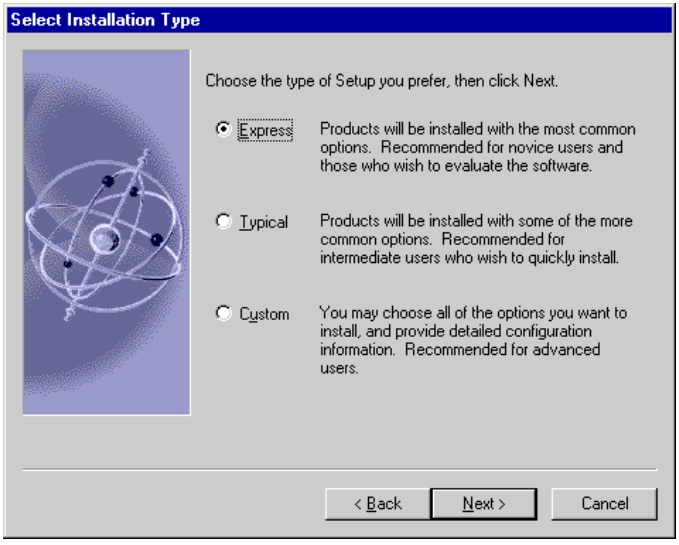
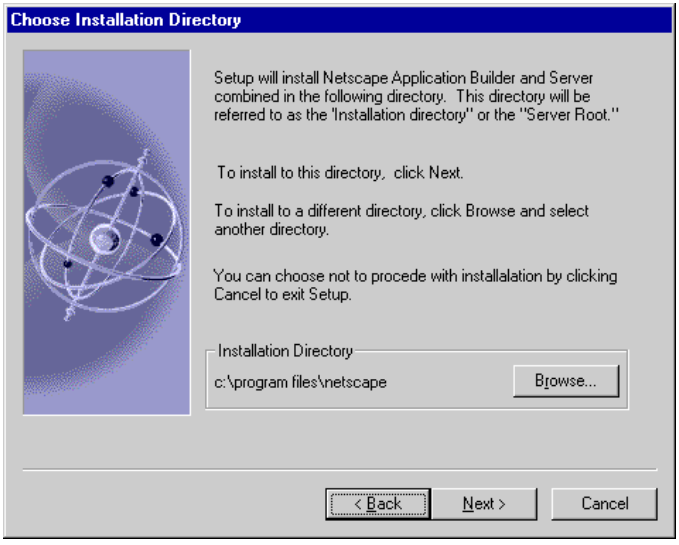


Figure 2.31 Netscape Application Builder and Server Setup Program (Continued)



Note In Figure 2.31, the Installation Directory can be any directory you choose.

Figure 2.32 Netscape Application Builder and Server Setup Program (Continued)

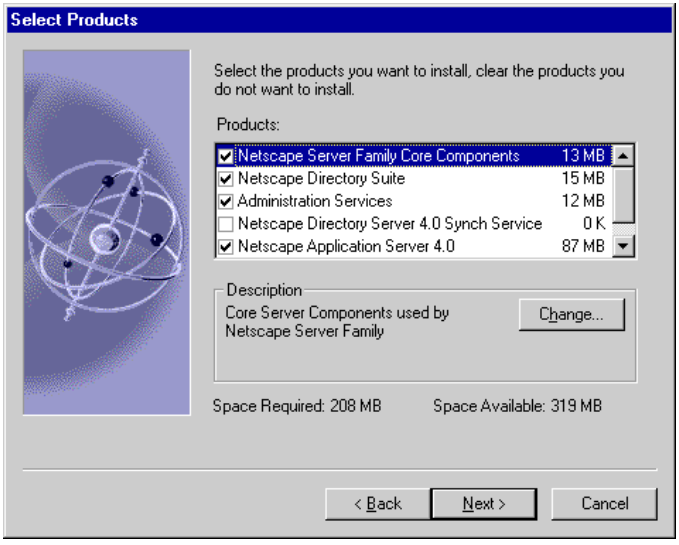
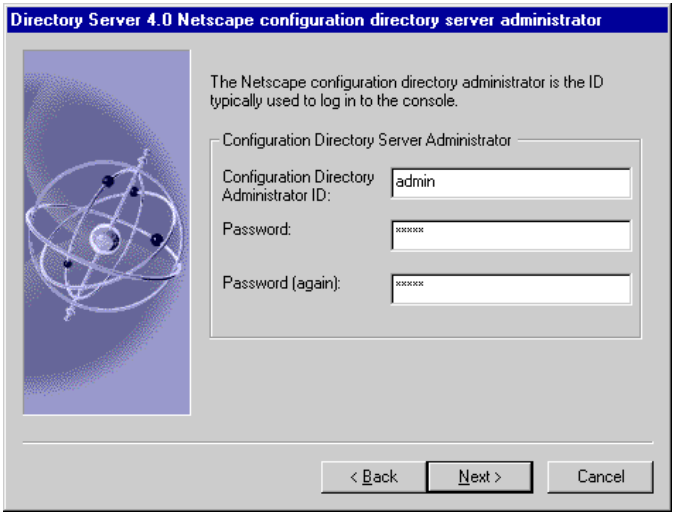


Figure 2.33 Netscape Application Builder and Server Setup Program (Continued)



Note The Configuration Directory Server Administrator in Figure 2.33 can be any administrator user.

Figure 2.34 Netscape Application Builder and Server Setup Program (Continued)

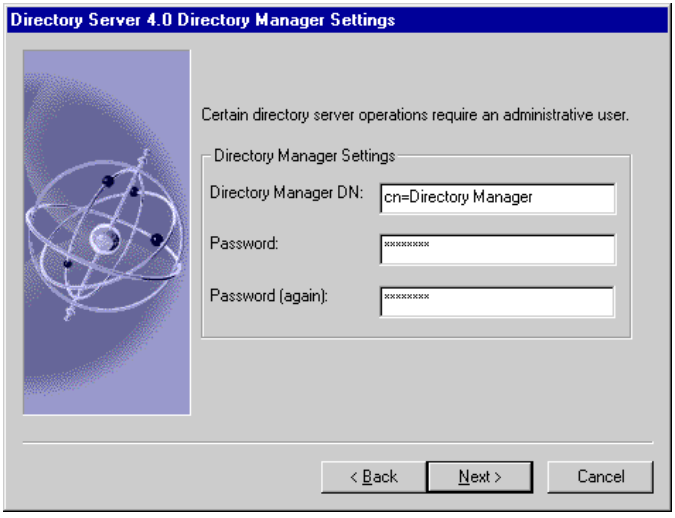


Figure 2.35 Netscape Application Builder and Server Setup Program (Continued)

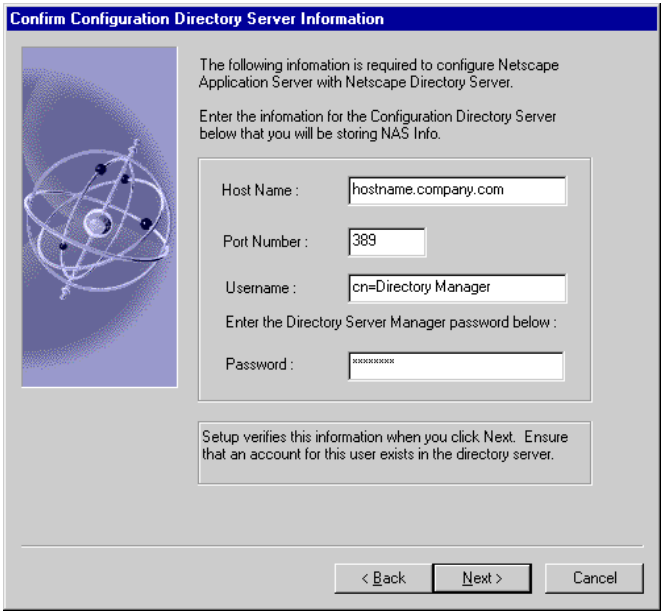


Figure 2.36 Netscape Application Builder and Server Setup Program (Continued)

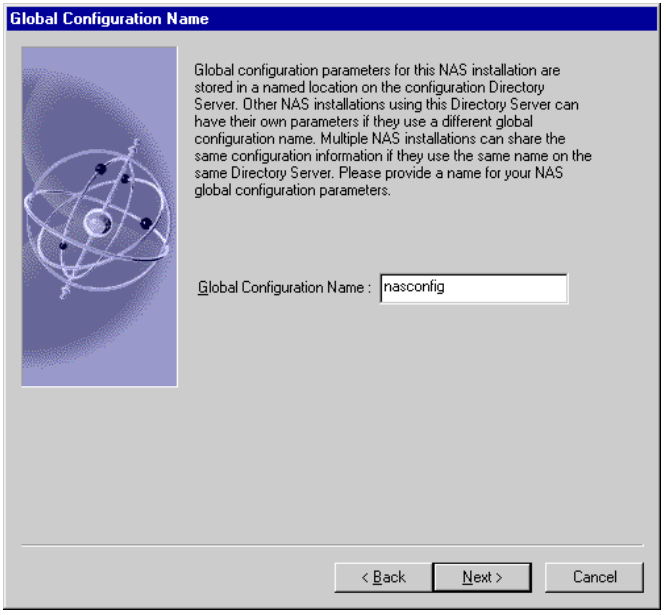


Figure 2.37 Netscape Application Builder and Server Setup Program (Continued)

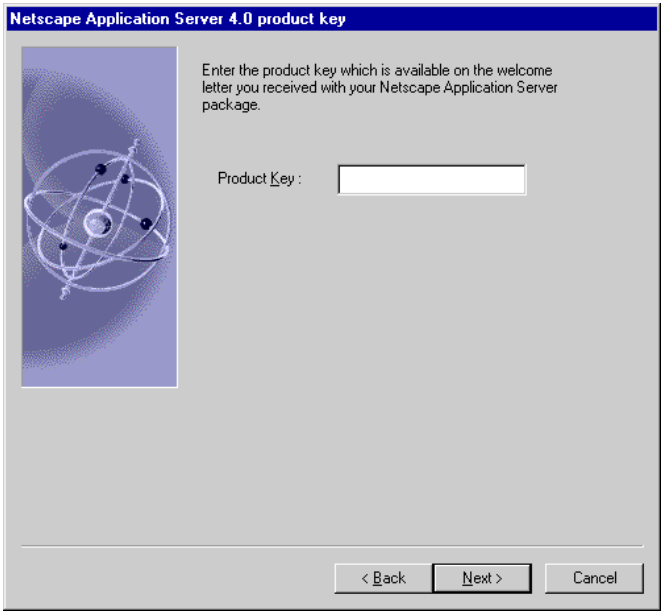


Figure 2.38 Netscape Application Builder and Server Setup Program (Continued)

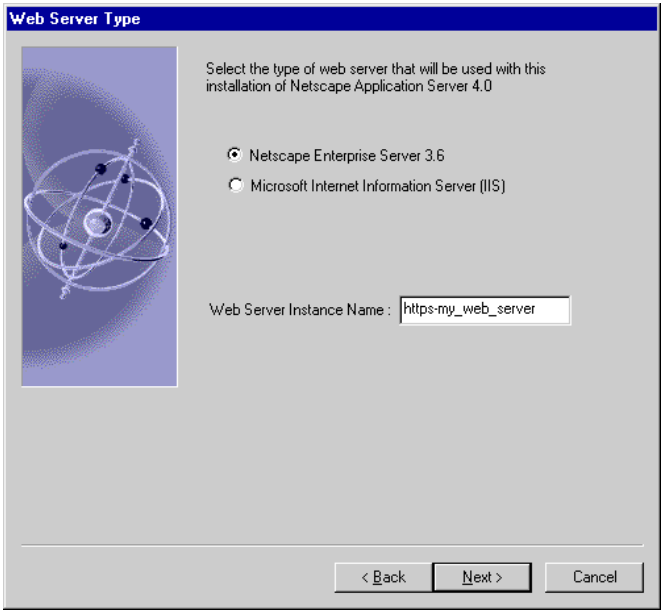


Figure 2.39 Netscape Application Builder and Server Setup Program (Continued)

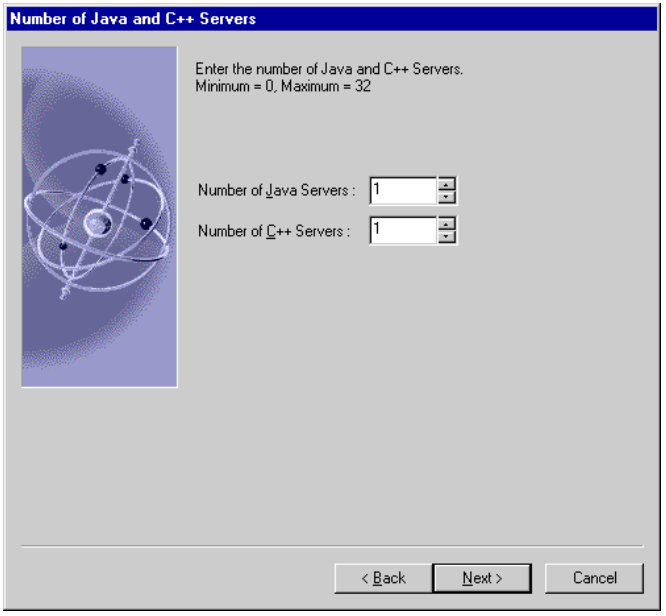


Figure 2.40 Netscape Application Builder and Server Setup Program (Continued)

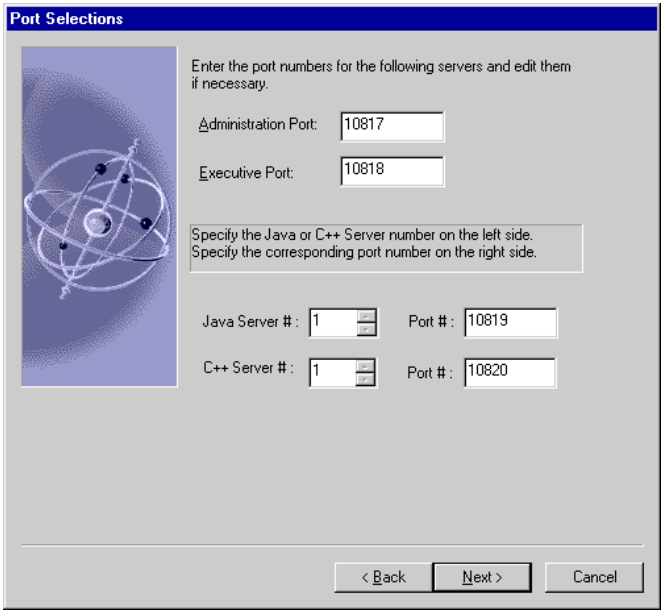


Figure 2.41 Netscape Application Builder and Server Setup Program (Continued)

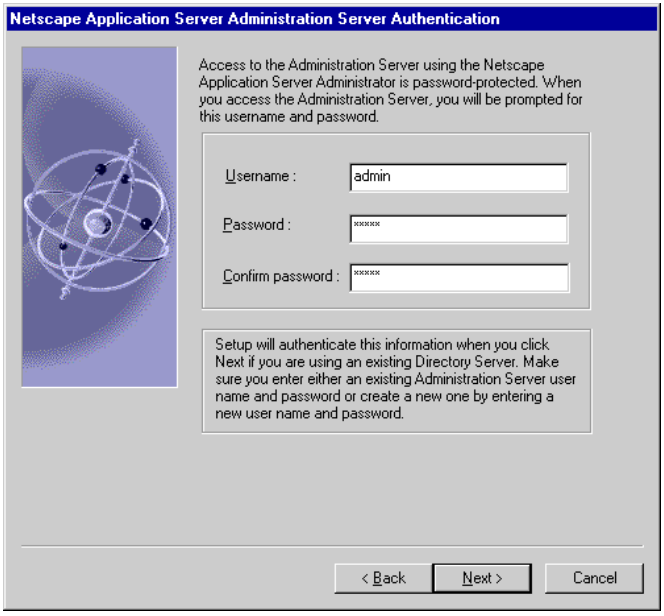


Figure 2.42 Netscape Application Builder and Server Setup Program (Continued)

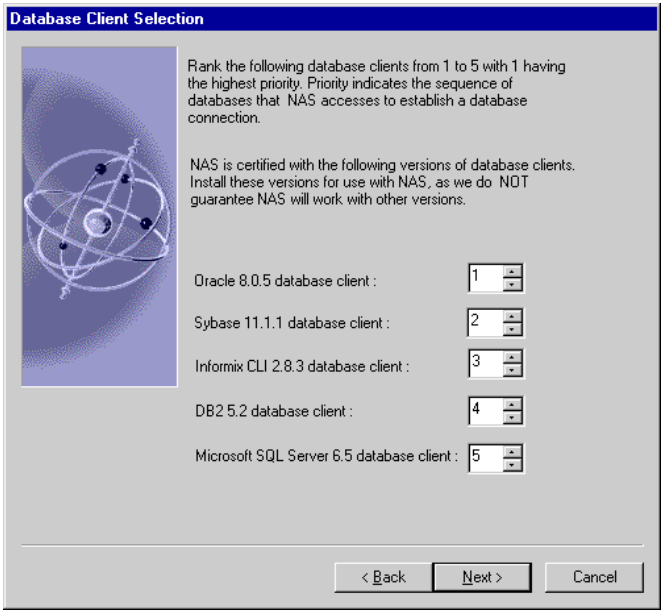
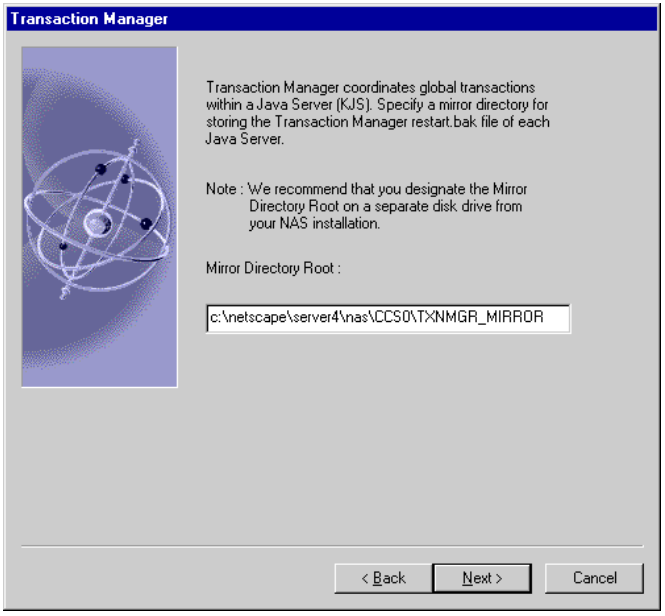


Figure 2.43 Netscape Application Builder and Server Setup Program (Continued)



Note In Figure 2.43, the Mirror Directory Root can be any directory you choose. If the directory you specify does not exist, you will be prompted to create it (Figure 2.44).

Figure 2.44 Netscape Application Builder and Server Setup Program (Continued)

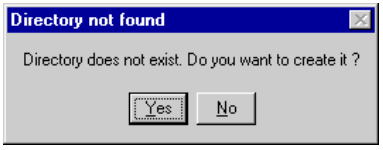


Figure 2.45 Netscape Application Builder and Server Setup Program (Continued)

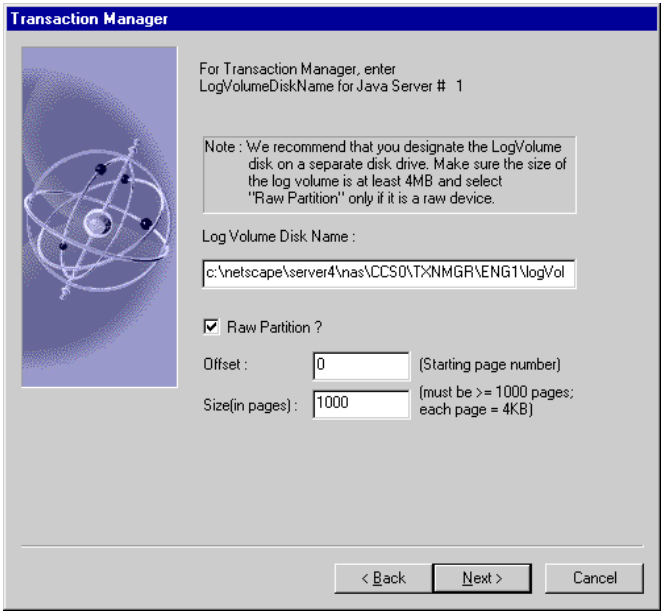


Figure 2.46 Netscape Application Builder and Server Setup Program (Continued)

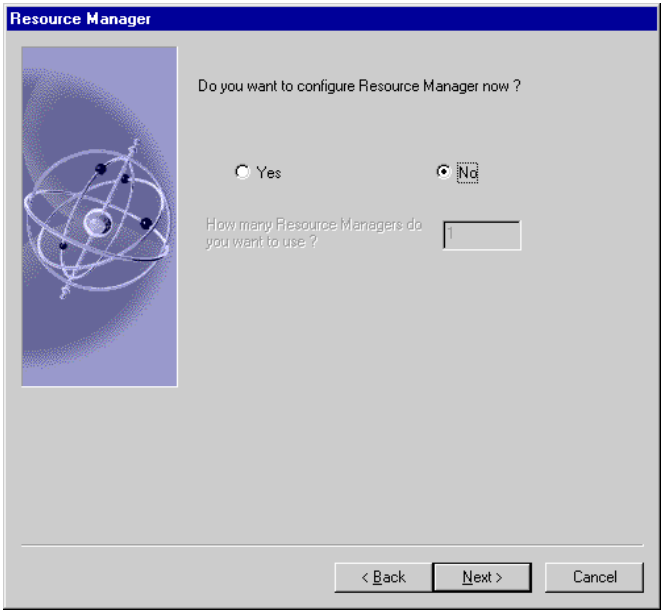


Figure 2.47 Netscape Application Builder and Server Setup Program (Continued)

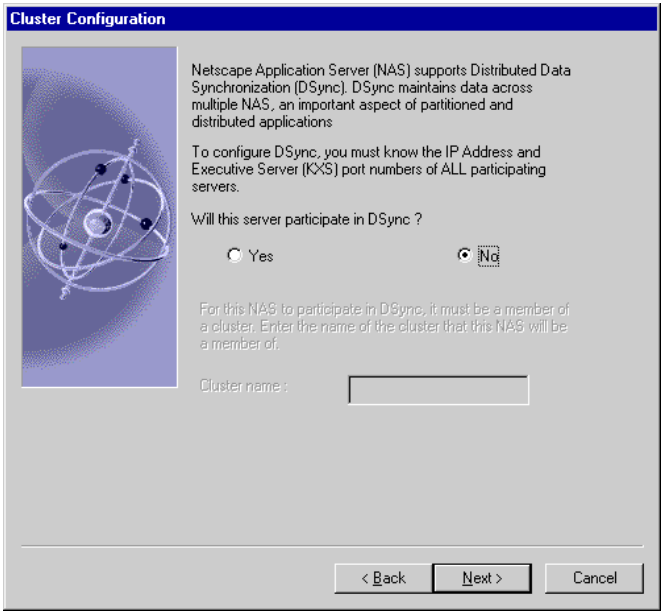
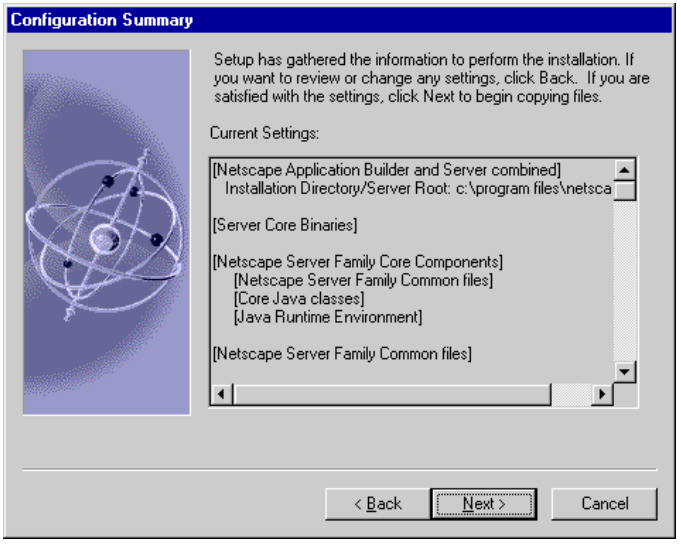


Figure 2.48 Netscape Application Builder and Server Setup Program (Continued)



Note As you begin copying files to the new installation directories, Figures 2.49-2.51 will appear.

Figure 2.49 Netscape Application Builder and Server Setup Program (Continued)

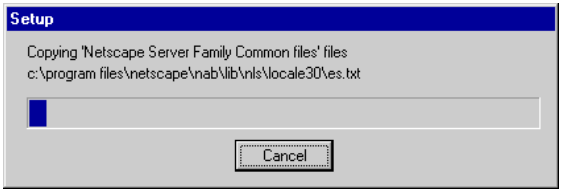


Figure 2.50 Netscape Application Builder and Server Setup Program (Continued)

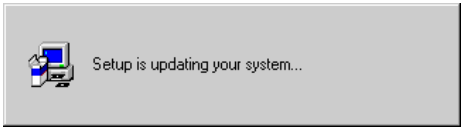
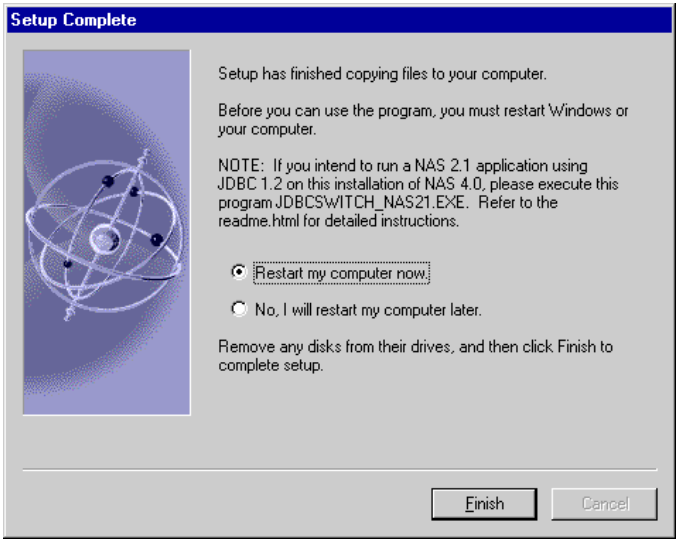


Figure 2.51 Netscape Application Builder and Server Setup Program (Continued)



Installing the ECXpert Extension to NAS and TradingXpert Together

The installation disk includes a script that installs the ECXpert extension to NAS, as well as the TradingXpert application, in one step.

Note If you choose to install the NAS ECXpert Extension and TradingXpert application separately, skip this section and proceed with "Installing the ECXpert Extension to NAS Separately" on page 55 and "Installing TradingXpert Separately" on page 56.

When your installation includes NAB, follow these steps to install both the NAS ECXpert Extension and the TradingXpert application:

1. **Log in as the same user under which you installed NAB 4.0.**

2. **Make sure the Netscape Directory Server is running.**

   When you install NAS 4.0, the installation starts Directory Server for you. By default, Directory Server is also started automatically when the machine is restarted.

   — From the Control Panel, double-click the **Services** icon.

   — Select the **Netscape Directory Server**.

   — If the Netscape Directory Server is not started, click **Start**.

3. **Enable the Netscape Extension Builder (NEB) Runtime Layer.**

   The NEB Runtime Layer, by default, is disabled in a new NAS installation. To enable it, modify <*NASDIR*>*bin**ketrt.gxr* so `enable=y` in all four sections.

   ```
   Extension ExtensionData-ExtensionData:loadpriority=0:enable=y
   ...
   Extension JavaExtData-JavaExtData:loadpriority=0:enable=y
   ...
   Extension LockManager-LockManager:loadpriority=0:enable=y
   ...
   Extension RLOPManager-RLOPManager:loadpriority=0:enable=y
   ```

4. **Register the ECXpert Extension with NAS.**

   Open a Command Prompt window and enter the following command:

   ```
   <NASDIR>\bin\kreg.exe < ketrt.gxr
   ```

5. **Run the installation script.**

   In the Command Prompt window, enter the following command:

   `<CDDRIVE>:\tradingxpert\install_all.bat <NASDIR>`

   where <*CDDRIVE*> is the drive letter of your CD drive (e.g., *E)* and <*NASDIR*> is the directory in which NAS is installed, for example:

   ```
   e:\tradingxpert\install_all.bat c:\netscape\server4\nas\
   ```

   This script will verify that the specified NAS directory is valid and will create subdirectories, if needed, in your <*NASDIR*>*Apps* directory.

   It will then install the NAS ECXpert Extension in the <*NASDIR*>*Apps**ecx* directory, and add files and subdirectories for the TradingXpert application under the <*NASDIR*>*Apps* directory.

Next Step After installation is complete, configure the TradingXpert application. For detailed instructions, see "Configuring TradingXpert with NAB" on page 58.

Note If you use the *install_all.bat* script, you do not need to run the separate *extension**setup_nt.bat* and *application**setup_nt.bat* scripts to install the NAS ECXpert Extension or the TradingXpert application. Skip "Installing the ECXpert Extension to NAS Separately" on page 55 and "Installing TradingXpert Separately" on page 56.

Installing the ECXpert Extension to NAS Separately

Note If you choose to install the NAS ECXpert Extension and the TradingXpert application in one step, per the instructions in "Installing the ECXpert Extension to NAS and TradingXpert Together" on page 54, skip this section.

If you choose to install the ECXpert Extension to NAS separately from the TradingXpert application, follow these steps when your installation includes NAB:

1. **Log in as the same user under which you installed NAB 4.0.**

2. **Make sure the Netscape Directory Server is running.**

   When you install NAS 4.0, the installation starts Directory Server for you. By default, Directory Server is also started automatically when the machine is restarted.

   — From the Control Panel, double-click the **Services** icon.

   — Select the **Netscape Directory Server**.

— If the Netscape Directory Server is not started, click **Start**.

3. **Enable the Netscape Extension Builder (NEB) Runtime Layer.**

   The NEB Runtime Layer, by default, is disabled in a new NAS installation. To enable it, modify <*NASDIR*>*bin**ketrt.gxr* so `enable=y` in all four sections.

```
Extension ExtensionData-ExtensionData:loadpriority=0:enable=y
...
Extension JavaExtData-JavaExtData:loadpriority=0:enable=y
...
Extension LockManager-LockManager:loadpriority=0:enable=y
...
Extension RLOPManager-RLOPManager:loadpriority=0:enable=y
```

4. **Register the ECXpert Extension with NAS.**

   Open a Command Prompt window and enter the following command:

   `<NASDIR>\bin\kreg.exe < ketrt.gxr`

5. **Run the installation script.**

   In the Command Prompt window, enter the following command:

   `<CDDRIVE>:\tradingxpert\extension\setup_nt.bat <NASDIR>`

   where <*CDDRIVE*> is the drive letter of your CD drive (e.g., *E)* and <*NASDIR*> is the directory in which NAS is installed, for example:

```
e:\tradingxpert\extension\setup_nt.bat c:\netscape\server4\nas\
```

   This script installs the NAS ECXpert Extension in the <*NASDIR*>*Apps**ecx* directory.

Next Step After installation is complete, install the TradingXpert application. For detailed instructions, see "Installing TradingXpert Separately" on page 56.

Installing TradingXpert Separately

Note If you choose to install the NAS ECXpert Extension and the TradingXpert application in one step, per the instructions in "Installing the ECXpert Extension to NAS and TradingXpert Together" on page 54, skip this section.

Warning The NAS ECXpert Extension must be installed before you continue. Refer to "Installing the ECXpert Extension to NAS and TradingXpert Together" on page 54 for detailed installation instructions.

If you choose to install the TradingXpert application separately from the NAS ECXpert Extension, follow these steps when your installation includes NAB:

1. **Log in as the same user under which you installed NAB 4.0.**

2. **Make sure Netscape Directory Server is running.**

   When you install NAS 4.0, the installation starts Directory Server for you. By default, Directory Server is also started automatically when the machine is restarted.

   — From the Control Panel, double-click the **Services** icon.

   — Select the **Netscape Directory Server**.

   — If the Netscape Directory Server is not started, click **Start**.

3. **Insert the TradingXpert CD-ROM in your system's CD-ROM drive.**

4. **Install the NAS ECXpert Extension, if you have not yet done so.**

   Refer to "Installing the ECXpert Extension to NAS Separately" on page 55 for detailed installation instructions.

5. **Run the TradingXpert installer.**

   Open a Command Prompt window and enter the following command:

   ```
   <CDDRIVE>:\tradingxpert\application\setup_nt.bat
     <NASDIR>
   ```

   where <*CDDRIVE*> is the drive letter of your CD drive, and <*NASDIR*> is the directory in which NAS is installed and the *Apps*, *bin*, and *lib* subdirectories exist, for example:

   ```
   e:\TradingXpert\application\setup_nt.bat c:\netscape\server4\nas\
   ```

   The script then creates subdirectories under the <*NASDIR*>*Apps* directory and copies files into these subdirectories. It also registers all the applogics with NAS.

Next Step After installation is complete, configure the TradingXpert application. For detailed instructions, see "Configuring TradingXpert with NAB" on page 58.

Configuring TradingXpert with NAB

This section provides detailed instructions for configuring your TradingXpert System when you are using it with NAB 4.0.

Note If TradingXpert and ECXpert are installed on different machines, you will *also* need to follow the additional instructions in "Configuring TradingXpert on a Different Machine from ECXpert" on page 63.

1. **Create a directory named TX under your NAS HTTP docs directory.**

   The NAS HTTP primary document directory is specified when you install the Netscape Enterprise Server (NES) instance associated with NAS.

   For example, if NES is installed in *c:\netscape\SuiteSpot*, your new directory might be *c:\netscape\SuiteSpot\docs\TX*.

2. **Copy the files from *<NASDIR>\Apps\Fx\web* directory to the TX directory.**

   Copy all the files from your *<NASDIR>\Apps\Fx\web* directory to the TX directory you just created under your NAS HTTP docs directory.

3. **Set up the account under which NAS will be started.**

   — From the Control Panel, double-click **Services**.

   — Select the **Netscape Application Server**.

   — Check **Startup** to open the Service dialog.

   — Select the account under which NAS will be started.

4. **(Optional) Set up NAS to display debug messages.**

Note This step requires you to log in to NAS using the System Account rather than as a user account.

NAS and TradingXpert produce debug messages. In order to see these messages, you must give the Netscape Application Server service permission to interact with the desktop. Follow the steps below to do this.

— From the Control Panel, double-click **Services**.

— Select the **Netscape Application Server**.

— Check **Startup** to open the Service dialog.

— Check **Allow Service to Interact with Desktop**.

— Click **OK** to close the Service dialog and return to the Services dialog, with the Netscape Application Server still selected.

— Click **Stop** to stop NAS.

— Click **Start** to restart NAS—debugging messages are now displayed in a Command Prompt window.

When you no longer want to view NAS debugging messages, repeat the steps above, *un*checking **Allow Service to Interact with Desktop** and restoring the login account to its previous value.

5. **Verify that BDGHOME is set to the *<NSBASE>\NS-apps\ECXpert* directory.**

Note If TradingXpert and ECXpert are installed on different machines, skip this step and follow Step 4 in "Configuring TradingXpert on a Different Machine from ECXpert" on page 63.

NAS uses the ECXpert configuration file. Follow these steps to verify that NAS can find the file:

— In the Control Panel of the machine on which ECXpert is installed, double-click the **System** icon, then click the **Environment** tab.

— Verify the value of *BDGHOME*.

Make sure the *BDGHOME* variable has the value

```
<NSBASE>\NS-apps\ECXpert
```

where *<NSBASE>* is the ECXpert installation directory.

NAB will then use the same *ecx.ini* file that ECXpert uses.

Note If NAS is started using the System Account (see Step 3), you will have to add *BDGHOME* to the **System Variables** section rather than to the **User Variables** section.

If the BDGHOME variable is not listed but ECXpert is installed and operational on this machine, it is possible that ECXpert was installed under a different user login. *All three components—ECXpert, NAS, and TradingXpert—must be installed as the same user.*

6. **Verify that the `ORACLE_HOME` and `ORACLE_SID` environment variables are set.**

Note If TradingXpert and ECXpert are installed on different machines, skip this step and follow Step 4 in "Configuring TradingXpert on a Different Machine from ECXpert" on page 63.

ECXpert requires these variables, which are used by Oracle, to interact with the Oracle database. They may be in either the **System Variables** or **User Variables** list on the **Environment** tab.

This is a redundant step: if ECXpert is operating correctly, it is certain that these environment variables are set correctly.

7. **If you made any changes in the Environment tab, restart the system.**

This is necessary for changes in environment variable settings to take effect.

8. **Modify *<NASDIR>\Apps\Fx\common\FXproperties* as follows:**

Note In the *FXproperties* file, the backslash (\) separating levels in a file system path must always be entered twice.

```
# root dir
FX.rootdir: <NASDIR>\\Apps\\Fx
```

Edit `FX.rootdir` to point to the TradingXpert directory under which directories like *common*, *document*, and *events* appear (e.g., *c:\\netscape\\server4\\nas\\Apps\Fx*).

```
# Base HREF
FX.basehref: http://<hostname>:<port>/<base>/
```

Edit `FX.basehref` to point to the base URL that you type to get to TradingXpert login screen, e.g., *http://host.company.com:5555/TX/*. Please note that the URL ends with a slash.

```
# Debugging flag
FX.debug: true
```

`FX.debug`, when set to true, prints a large number of messages to *kjs* logs to enable you to debug problems easily. Set this to false in a production environment.

```
# Location of ini file
FX.ecxini.file: <NSBASE>\\NS-Apps\\ECXpert\\config\\ecx.ini
```

Edit `FX.ecxini.file` to point to the path to the ECXpert *ecx.ini* file. This file should be in the *config* subdirectory of the directory designated as `BDGHOME`.

```
# session timeout value in minutes. Change to 30 for production
FX.session.timeout: 8
```

`FX.session.timeout` is the number of minutes between the last user interaction and the TradingXpert session timeout. If TradingXpert times out, the user will be requested to log in again. We recommend you set this value to 30 in a production environment.

```
# Set this to true if remote submission is to be used.
FX.remoteSubmission: false
```

If both TradingXpert and ECXpert are on a single machine, `FX.remoteSubmission` should be set to false. If TradingXpert is set up in a remote client configuration, with ECXpert on one machine and TradingXpert on a different machine, `FX.remoteSubmission` should be set to true (see Step 14 in "Configuring TradingXpert with NAB" on page 58).

```
# Prefix to be added to filenames when ECX is on remote machine
# For example, /h/ECXmachine is the mountpoint for ECX disk
# on TradingXpert machine. This is used ONLY if remoteSubmission
# is set to true
FX.remoteECXPathPrefix:
```

Leave the ECX path prefix value empty (i.e., `FX.remoteECXPathPrefix:` - nothing following the colon).

Note To synchronize your ECXpert system with your TradingXpert on a remote machine, you must *also* select a drive letter and map it the same way on the two systems. See Step 9 of "Configuring TradingXpert on a Different Machine from ECXpert" on page 63 for details.

The remainder of this file does not need to be edited unless you are using any of the optional features outlined in the *iPlanet TradingXpert Site Administrator's and Developer's Handbook*. It is configured to work with TradingXpert as installed.

9. Stop NAB Runtime.

When NAB Runtime on NT starts up, it opens three Command Prompt windows. Closing all three of these windows shuts down the NAB Runtime.

10. Restart NAB Runtime.

From the Windows NT **Start** bar, select **Start** | **Programs** | **Netscape Application Builder 4.0** | **Runtime Environment**. Four Command Prompt windows open. These are for the `kxs`, `kjs`, `kcs`, and `kas` engines.

From these four Command Prompt windows, select the one with **kjs.exe** in the title bar. Make sure the window is displaying output that looks something like the following. You may have to scroll up the window to see the output:

```
[06/01/99 14:44:53:6] info: PROT-004: protocol data added
[06/01/99 14:44:53:7] info: PROT-004: protocol data added
[06/01/99 14:44:53:7] info: PROT-004: protocol data added
...
[06/01/99 14:44:54:5] error: CONN-003: socket receive error
  (RecvBuffer 1) (conn 0x967780, sock 988, host 0xd00c226f, port 0)
[06/01/99 14:44:54:5] info: PROT-001: RecvBuffer failed during
  GXRunConn::Main()
[06/01/99 14:44:55:6] info: PROT-004: protocol data added
[06/01/99 14:44:55:7] info: EXTMGR-006: GXExtensionManager:
  Extension service ExtensionData successfully loaded
[06/01/99 14:44:55:8] info: EXTMGR-006: GXExtensionManager:
  Extension service JavaExtData successfully loaded
[06/01/99 14:44:55:9] info: EXTMGR-006: GXExtensionManager:
  Extension service LockManager successfully loaded
[06/01/99 14:44:56:5] info: EXTMGR-006: GXExtensionManager:
  Extension service RLOPManager successfully loaded
[06/01/99 14:44:57:8] info: EXTMGR-006: GXExtensionManager:
  Extension service cECX successfully loaded
[06/01/99 14:44:58:0] info: EXTMGR-006: GXExtensionManager:
  Extension service _cECX successfully loaded
[06/01/99 14:44:58:0] info: REQ-012: thread add
[06/01/99 14:44:58:0] info: REQ-012: thread add
[06/01/99 14:44:58:0] info: REQ-012: thread add
...
[06/01/99 14:44:58:0] info: REQ-012: thread add
[06/01/99 14:44:58:0] info: REQ-012: thread add
[06/01/99 14:44:58:0] info: REQ-012: thread add
[06/01/99 14:44:58:0] info: REQ-012: thread add
[06/01/99 14:44:58:0] info: REQ-012: thread add
ready: 13001
```

Note If you see error message(s) about not being able to find a library, the installation was not successful.

11. Start up TradingXpert.

To access TradingXpert, use your browser to go to the following URL:

http://host:port/TX

Configuring TradingXpert on a Different Machine from ECXpert

This section provides details on the additional tasks you must perform, assuming the following scenario:

- "Machine 1" is the host for TradingXpert, NAS, the ECXpert Extension to NAS, and an Oracle client.
- "Machine 2" is the host for ECXpert and an Oracle client.
- "Oracle DB" is the host for the Oracle database server.

These instructions apply to an initial installation of TradingXpert on a separate machine, *or* to a migration of TradingXpert away from the same machine as ECXpert onto a different machine.

1. **Configure Machine 1 (TradingXpert) to access the database used by ECXpert on Machine 2.**
   - Edit the *tnsnames.ora* file.
   - Ensure that the Oracle client environment is properly set up.
2. **Set up the account under which NAS will be started on Machine 1.**
   - From the Control Panel, double-click **Services**.
   - Select the **Netscape Application Server**.
   - Check **Startup** to open the Service dialog.
   - Select the account under which NAS will be started.
3. **(Optional) Set up NAS to display debug messages on Machine 1.**

Note This step requires you to log in to NAS using the System Account rather than as the ECXpert administrator user (e.g., *actraadm*).

NAS and TradingXpert produce debug messages. In order to see these messages, you must give the Netscape Application Server service permission to interact with the desktop. Follow the steps below to do this.

- From the Control Panel, double-click **Services**.
- Select the **Netscape Application Server**.

— Check **Startup** to open the Service dialog.

— Check **Allow Service to Interact with Desktop**.

This will change the account under which NAS is started to System Account.

— Click **OK** to close the Service dialog and return to the Services dialog, with the Netscape Application Server still selected.

— Click **Stop** to stop NAS.

— Click **Start** to restart NAS—debugging messages are now displayed in a Command Prompt window.

When you no longer want to view NAS debugging messages, repeat the steps above, *un*checking **Allow Service to Interact with Desktop** and restoring the login account to its previous value.

4. **Create the *BDGHOME* variable on Machine 1 (TradingXpert).**

— In the Control Panel, double-click the **System** icon, then click the **Environment** tab.

— In the **Variable** box near the bottom, enter **BDGHOME**.

— In the **Value** box near the bottom, enter the value that the *BDGHOME* environment variable has on the ECXpert host.

For example: *d:\my_bdghome*

— Click the **Set** button. Leave the **System Properties** window open to use for Step 5.

Note If NAS is started using the System Account (see Step 2), you will have to add *BDGHOME* to the **System Variables** section rather than to the **User Variables** section.

5. **Create the `ORACLE_HOME` and `ORACLE_SID` variables on Machine 1 (TradingXpert).**

— Click anywhere in the **User Variables** list.

This is necessary to activate the User Variables list for the next several steps. It does not matter which variable your click selects.

— In the **Variable** box near the bottom, enter **`ORACLE_HOME`**.

— In the **Value** box near the bottom, enter the value that the `ORACLE_HOME` environment variable has on the ECXpert host.

For example: d:*orant*

Recommendation Avoid using spaces in directory and file names (e.g., use "ProgramFiles" instead of "Program Files.")

— Click the **Set** button.

— In the **Variable** box near the bottom, enter **ORACLE_SID**.

— In the **Value** box near the bottom, enter the value that the ORACLE_SID environment variable has on the ECXpert host.

For example: *ORCL*

Recommendation Avoid using spaces in directory and file names (e.g., use "ProgramFiles" instead of "Program Files.")

— Click the **Set** button.

— Click **OK** to close the System Properties dialog.

6. **Restart Machine 1 (TradingXpert).**

   This is necessary for changes in environment variable settings to take effect.

7. **Make a backup copy of the ECXpert *ecx.ini* file.**

8. **Create a *config* directory on Machine 1 (TradingXpert).**

   — Open a file system window or a Command Prompt window.

   — Create a *config* directory immediately below the directory specified for BDGHOME.

   For example, if you set BDGHOME to *d:\my_bdghome*, you would now create *d:\my_bdghome\config*.

   Later instructions will direct you to copy the ECXpert *ecx.ini* file to this directory.

9. **Select a drive letter (e.g., *y:* \) that both Machine 1 (TradingXpert) and Machine 2 (ECXpert) can use the same way.**

   On Machine 1 (TradingXpert) and Machine 2 (ECXpert), map a drive to the ECXpert install directory on Machine 2 (ECXpert). Both mappings must be identical (e.g., *y:\ECXinstall*).

10. **On Machine 2 (ECXpert), modify the *ecx.ini* file to use the drive letter mapped in Step 9.**

11. **Modify the following lines of the *ecx.ini* file.**

    In this example, the drives on both machines have been mapped to the *y:*\ drive:

```
[gateway]
...
repository = y:\NS-apps\ECXpert\data\bundle
...
[tcpip-connector]
...
port_location = static
...
admin_port = <any unused port>
admin_port_type = manual
listener_port = <any unused port>
listener_port_type = manual
...
repository = y:\NS-apps\ECXpert\data\work\trk
remote_dir = y:\NS-apps\ECXpert\data\work\remote
...
[translate]
...
workDir=y:\NS-apps\ECXpert\data\work
...
inputDir=y:\NS-apps\ECXpert\data\input
outputDir=y:\NS-apps\ECXpert\data\output
mapsDir=y:\NS-apps\ECXpert\maps
...
[FAGen]
...
outputDir=y:\NS-apps\ECXpert\data\output
```

12. **Copy the *ecx.ini* file from Machine 2 (ECXpert) to Machine 1 (TradingXpert).**

    Copy the *ecx.ini* file from the ECXpert machine's directory *<NSBASE>**NS-apps**ECXpert**config* to the TradingXpert machine's *BDGHOME**config* directory.

13. **Check the `DB_SERVER` parameter.**

    In the `[DB_SECTION]` section of the *ecx.ini* file you just copied to Machine 1 (TradingXpert), locate the `DB_SERVER` parameter. If ECXpert is using a local Oracle installation on the ECXpert host machine, this parameter does not exist and you must create it now—enter the line in the `[DB_SECTION]` section as follows:

    `DB_SERVER =` *`<Oracle DB alias>`*

Where `<Oracle DB alias>` is the Oracle database alias from the *tnsnames.ora* file.

14. **Modify the *FXproperties* file on Machine 1 (TradingXpert).**
    - Turn on remote submission (`FX.remoteSubmission: true`).
    - Be sure the ECX path prefix value is empty (i.e., `FX.remoteECXPathPrefix:` - nothing following the colon).
15. **Restart ECXpert on Machine 2 (ECXpert).**
16. **Restart TradingXpert on Machine 1 (TradingXpert).**
17. **Restart Web server for NAS on Machine 1 ().**

Migrating from TradingXpert 3.0 to 3.5.1

Follow these steps to migrate from TradingXpert 3.0 to 3.5.1:

1. **Upgrade to ECXpert 3.0.**

   For detailed instructions for upgrading to ECXpert 3.0 from version 2.0 or version 1.1.1, see the *iPlanet ECXpert Installation Guide* included in your ECXpert package.

   In addition to performing the basic installation, create the Mercator maps, custom services, and ECXpert database schema you will need to do business with trading partners. For more information about these tasks, see the *iPlanet ECXpert Administrator's Guide* included in your ECXpert package.

2. **Back up your current customized TradingXpert application.**

3. **Upgrade from NAS 2.1 to NAS 4.0.**

   For detailed instructions and issues for upgrading NAS 2.1 to version 4.0, see the *iPlanet Application Server (iAS) 4.0 Overview and Installation Guide* included with NAS 4.0.

   When you install NAS 4.0, we recommend that you perform the express installation, according to the instructions in "Installing NAS" on page 18. This will ensure the optimum performance of NAS with TradingXpert.

4. **(Optional) Upgrade from NAB 2.1 to NAB 4.0.**

   For detailed instructions and issues for upgrading NAB 2.1 to version 4.0, see the documentation included with NAB.

5. **Install the TradingXpert 3.5.1 application.**

   For detailed instructions, see "Installing iPlanet TradingXpert with Netscape Application Server (NAS)" on page 18 or "Installing iPlanet TradingXpert with Netscape Application Builder (NAB)" on page 40.

6. **Compare your original *.java* and *.html* files with the newly-installed ones and modify the new files as necessary.**

   If you customized existing Java and HTML files in your TradingXpert 3.0 installation, update the TradingXpert 3.5.1 files with the customized information. Recompile all modified Java files.

If you created new files Java and HTML files to your TradingXpert 3.0 installation, add those files to the appropriate directory under <*NASDIR*>*Apps**Fx*. Recompile all custom Java files.

Chapter

3

Postinstallation Tasks

This chapter explains how to download recommended patches to the Solaris operating system, how to test your iPlanet TradingXpert installation to be sure it worked, and the steps you must perform in order to modify and develop Java programs for NAS 4.0:

The following topics are discussed in this section:

- Downloading Windows NT Service Packs
- Downloading Windows NT Service Packs
- Customizing TradingXpert with NAB and Deploying Customizations to NAS

Downloading Windows NT Service Packs

From time to time, Microsoft Corporation releases service packs for the Windows NT operating system that address system, user, or security-related bugs. Download and install the latest Windows NT service packs from the following URL:

http://www.microsoft.com/ntserver/

Figure 3.2 Windows NT 4.0 Service Pack 6 Updates Catalog

Windows NT 4.0 Service Pack 6
Base Operating System Q193763 GetFileAttributes API May Return Invalid Return Code Q194918 XCOPY /D Uses Universal Time, Not Local Time, to Filter Files ... **Year 2000 Issues** Q216913 BIOS Date Value does not Immediately Update on January 1, 2000 Q238020 XIMS: NNTP Service Converts Two-digit Years Incorrectly ... **Networking** Q162401 NWConv Cannot Migrate 2-Character NetWare Server Q171307 How to Disable SAP Broadcast for RPC Service ... **Shell** Q179553 Access Violation in PolEdit When Defining Allowed Windows Applications Q190812 Briefcase Item Needs to Be Synchronized Twice ... **Security** Q188348 Specially-Malformed FTP Requests May Create Denial of Service Q193361 MSGINA.DLL does not Reset WINLOGON Structure ... Other Q195046 XFOR: IStream::Stat( ) Returns E_NOTIMPL in MCIS 2.0 Q195508 Devices Tool Hangs When Clicking HW Profile for I20 Bus Driver

Testing Your TradingXpert Installation

This section details the setup for a sample trading partner to receive purchase orders from your ECXpert installation and to submit invoices, as well as file attachments, back to your ECXpert system. For this example, your membership name will be *TXhost* and your sample trading partner will be *webuser1*.

You can set up the necessary memberships, service lists, and partnerships either:

- by setting up the test data manually per the instructions in the following section

  or

- by importing the test data that is provided on your installation disk into your database. (See Appendix A, "TradingXpert Test Data Import Files").

After you set up all necessary data, you will test the document exchange in both directions.

Setting up Test Data for Document Exchange

If you choose to set up the necessary memberships, service lists, and partnerships for this test scenario manually, rather than import them as detailed in "Importing Test Data for Document Exchange" on page 104, perform the following tasks:

1. Set up member **TXhost** (yourself) with EDI trading address of ZZ:TXhost.
2. Set up member **webuser1** (your trading partner) with EDI trading address of ZZ:webuser1.
3. Set up a service list for sending POs to webuser1 (Figure 3.3).
4. Set up a partnership for sending POs to webuser1 (Figure 3.4, Figure 3.5, Figure 3.6).
5. Set up a service list for receiving invoices back from webuser1 (Figure 3.7).
6. Set up a partnership for receiving invoices back from webuser1 (Figure 3.8, Figure 3.9, Figure 3.10, Figure 3.11).

7. Set up a service list for receiving file attachments back from webuser1 (Figure 3.12).

8. Set up a partnership for receiving file attachments back from webuser1 (Figure 3.13, Figure 3.14).

Setup for Partner to Receive Purchase Orders

Figures 3.3-3.6 and the accompanying tables of screen details show how to set up ECXpert to allow "webuser1" to receive and view purchase orders in TradingXpert.

Figure 3.3 Service List Details for using TradingXpert to receive purchase orders <slEDIt2w>

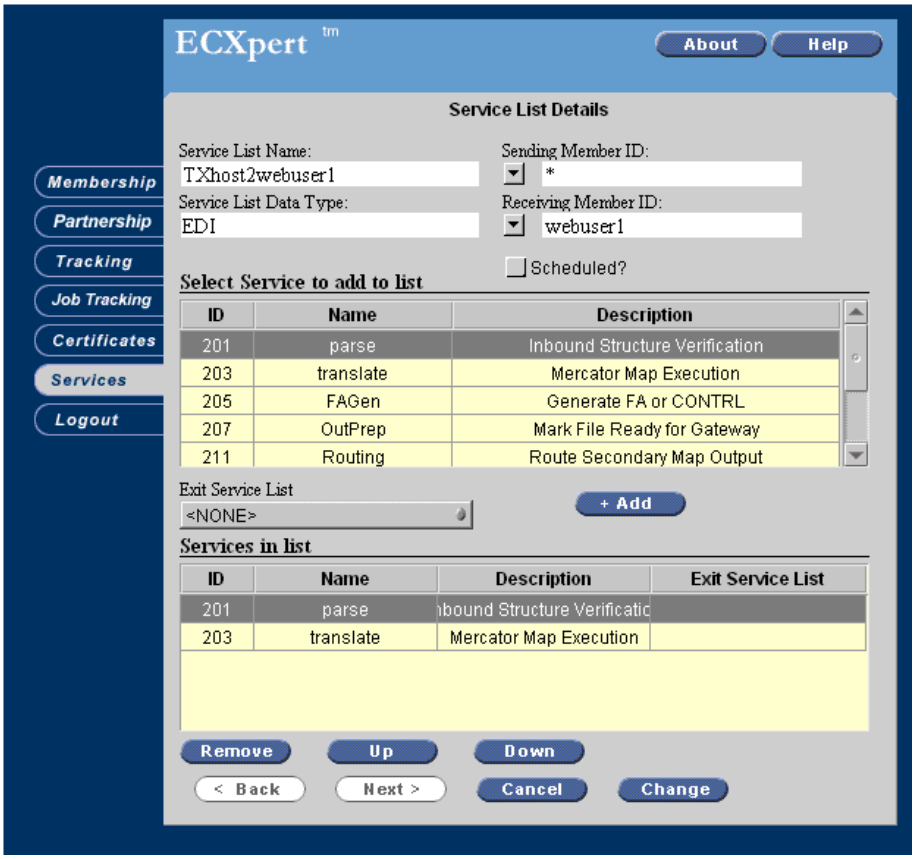


Table 3.1 Required Service List Details for receiving purchase orders

Item	Description
	Service List Details
[Parameters]	Modify to meet your specific needs.
	Select Service to add to List
Parse	Logically breaks incoming EDI into its constituent parts.
Translate	Converts submission unit documents from one format to another.

Note You must *not* include Gateway in this service list. In effect, TradingXpert replaces the Gateway function. If Gateway is in this service list, ECXpert attempts to send purchase orders directly to the trading partner.

Figure 3.4 Partnership Info for using TradingXpert to receive purchase orders

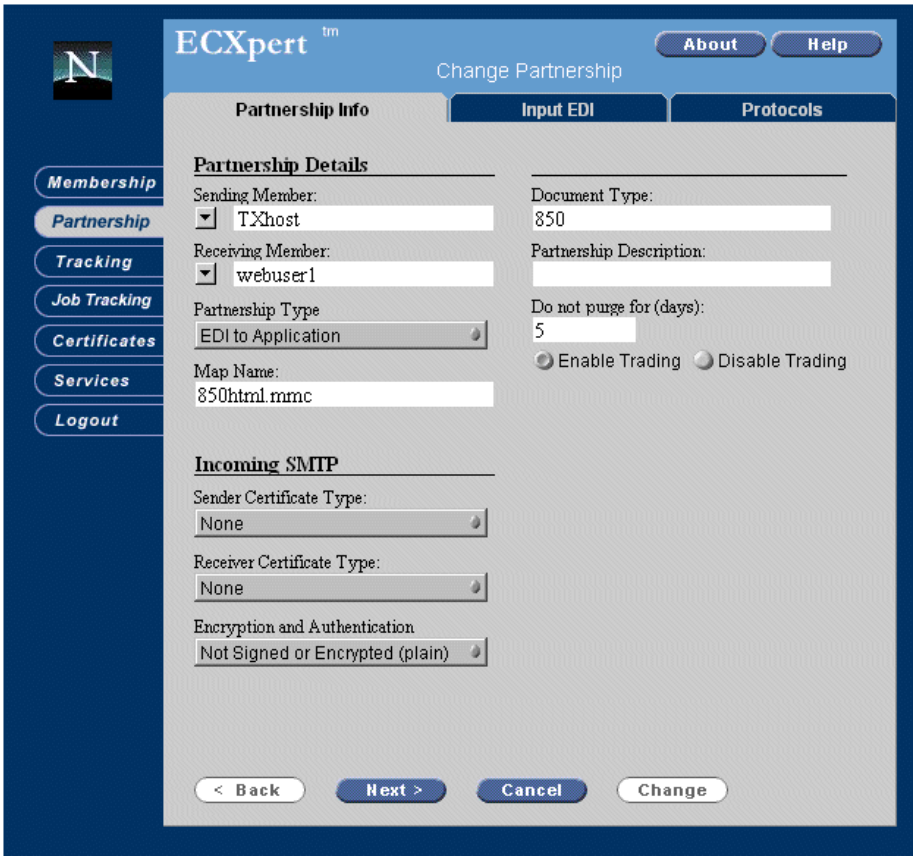


Table 3.2 Required Partnership Information for receiving purchase orders

Item	Description
Partnership Details	
Sending Member	**TXhost**—ECXpert member set up to communicate with TradingXpert
Receiving Member	**webuser1**—trading partner who will be receiving your purchase orders through TradingXpert via a browser
Document Type	**850**

Item	Description
Partnership Details	
Partnership Type	**EDI to Application**
Map Name	**850html.mmc**
Incoming SMTP	
[Parameters]	Use the default values, or modify them to meet your specific needs.

Figure 3.5 Input EDI for using TradingXpert to receive purchase orders

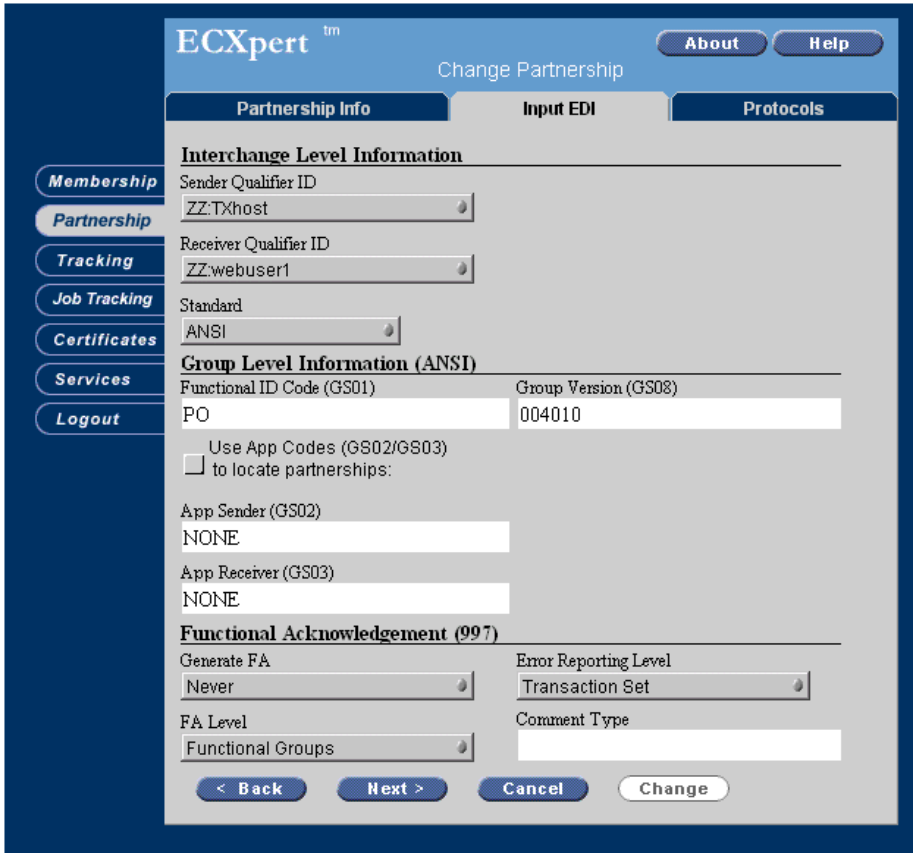


Table 3.3 Required Input EDI Information for receiving purchase orders

Item	Description
Interchange Level Information	
Sender Qualifier ID	**ZZ:TXhost**
Receiver Qualifier ID	**ZZ:webuser1**
Standard	**ANSI**
Group Level Information	
Functional ID Code	**PO**
Group Version	**004010**
[Remaining Parameters]	Use the default values, or modify them to meet your specific needs.
Functional Acknowledgments	
[Parameters]	Use the default value, or modify them to meet your specific needs.

Figure 3.6 Protocols for using TradingXpert to receive purchase orders

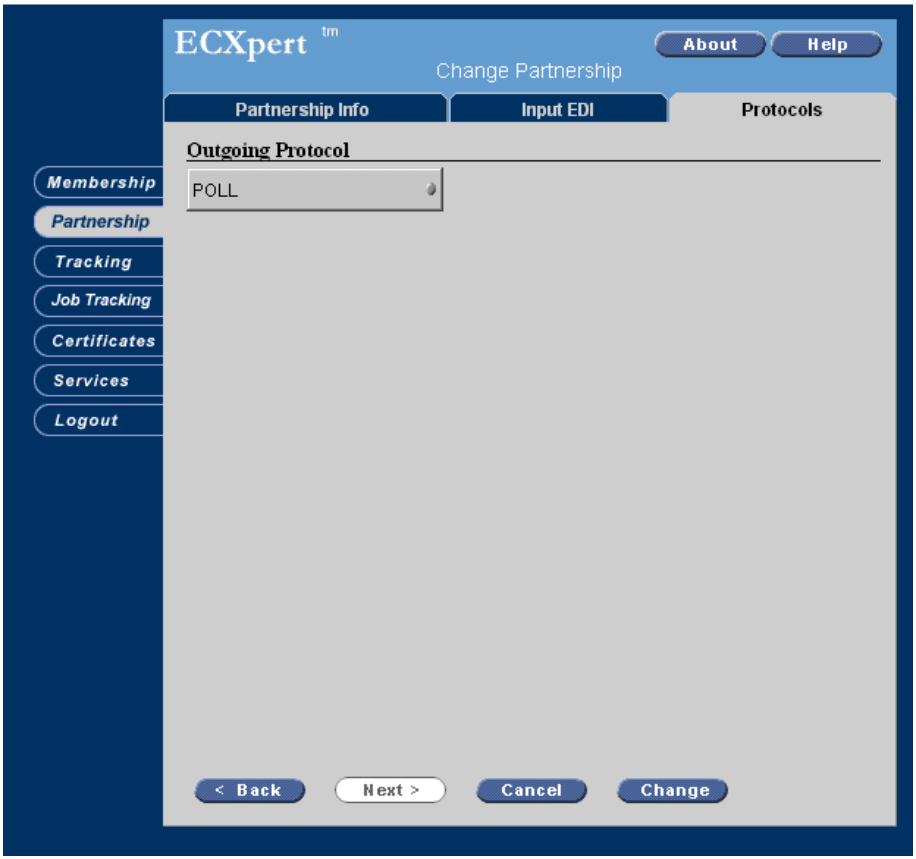


Table 3.4 Required Protocols for receiving purchase orders

Item	Description
Outgoing Protocol	
Drop-down protocol list	**POLL**

Setup for Partner to Submit Invoices

Figures 3.7-3.11 and the accompanying tables of screen details show how to set up ECXpert to allow "webuser1" to submit invoices, based on purchase orders viewed, through TradingXpert.

Figure 3.7 Service List for using TradingXpert to submit invoices

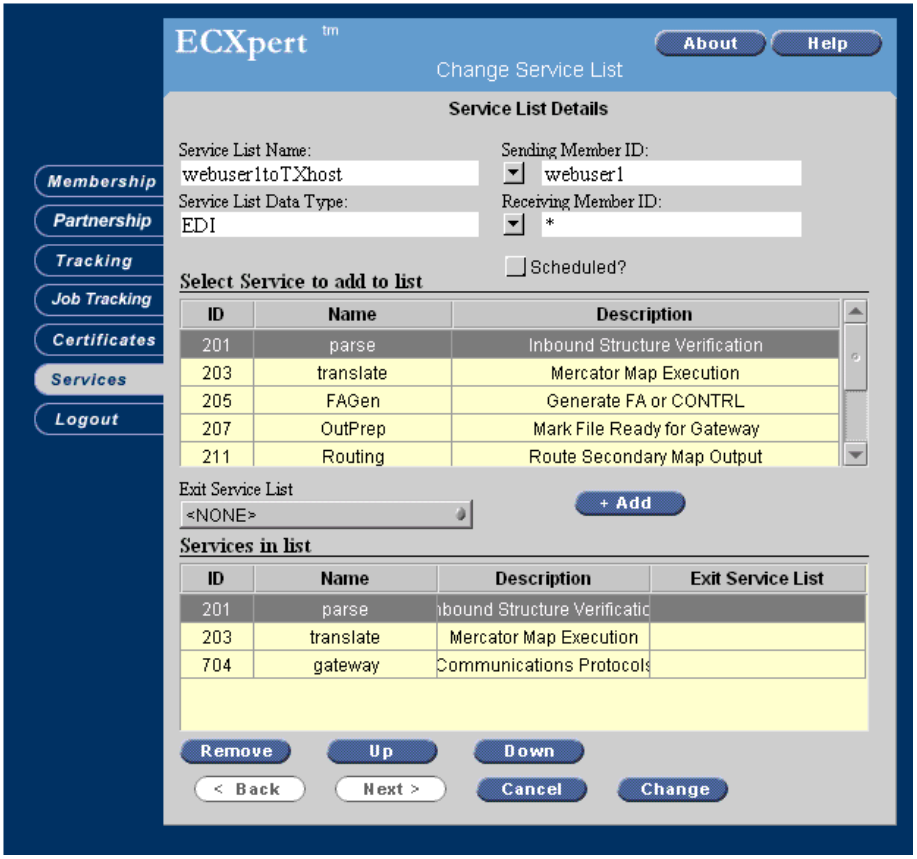


Table 3.5 Required Service List Details for submitting invoices

Item	Description
	Service List Details
[Parameters]	Modify to meet your specific needs.
	Select Services to add to List
Parse	Logically breaks incoming EDI into its constituent parts.
Translate	Converts submission unit documents from one format to another.
Gateway	Triggers the sending of finished submission units.

Figure 3.8 Partnership Info for using TradingXpert to submit invoices

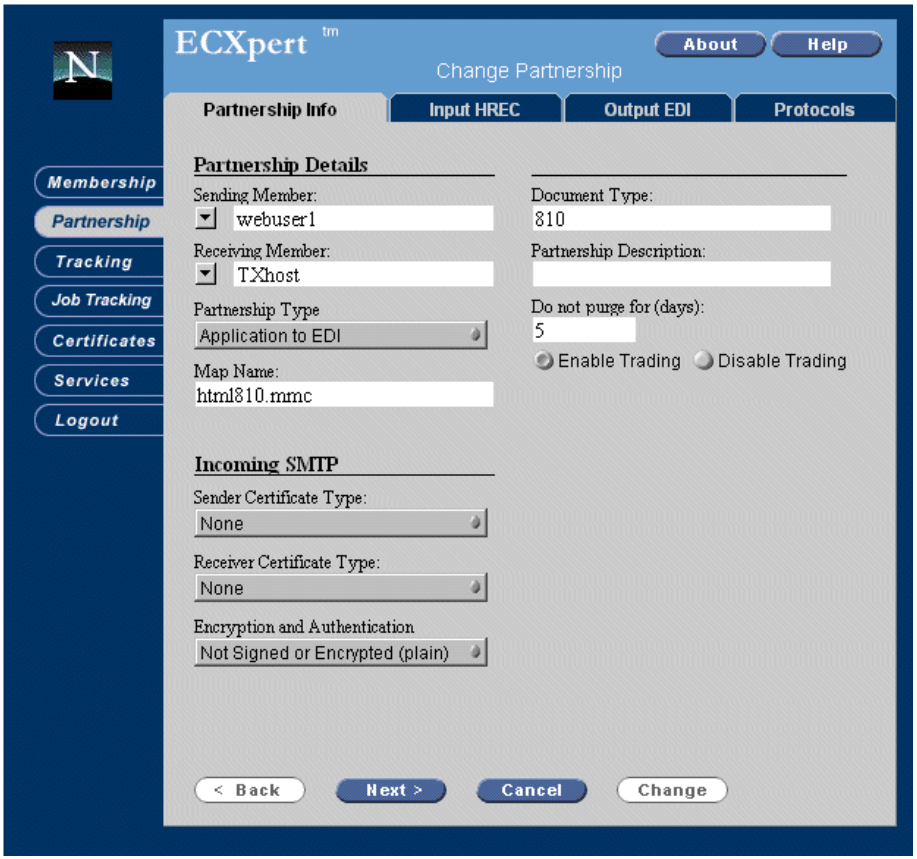


Table 3.6 Required Partnership Information for submitting invoices

Item	Description
Partnership Details	
Sending Member	**webuser1**—trading partner who will be sending you invoices through TradingXpert, based on your purchase orders to the associated company viewed through TradingXpert
Receiving Member	**TXhost**—ECXpert member set up to communicate with TradingXpert
Document Type	**810**
Partnership Type	**Application to EDI**

Item	Description
	Partnership Details
Map Name	**html810.mmc**
	Incoming SMTP
[Parameters]	Use the default values, or modify them to meet your specific needs.

Figure 3.9 Input HREC for using TradingXpert to submit invoices

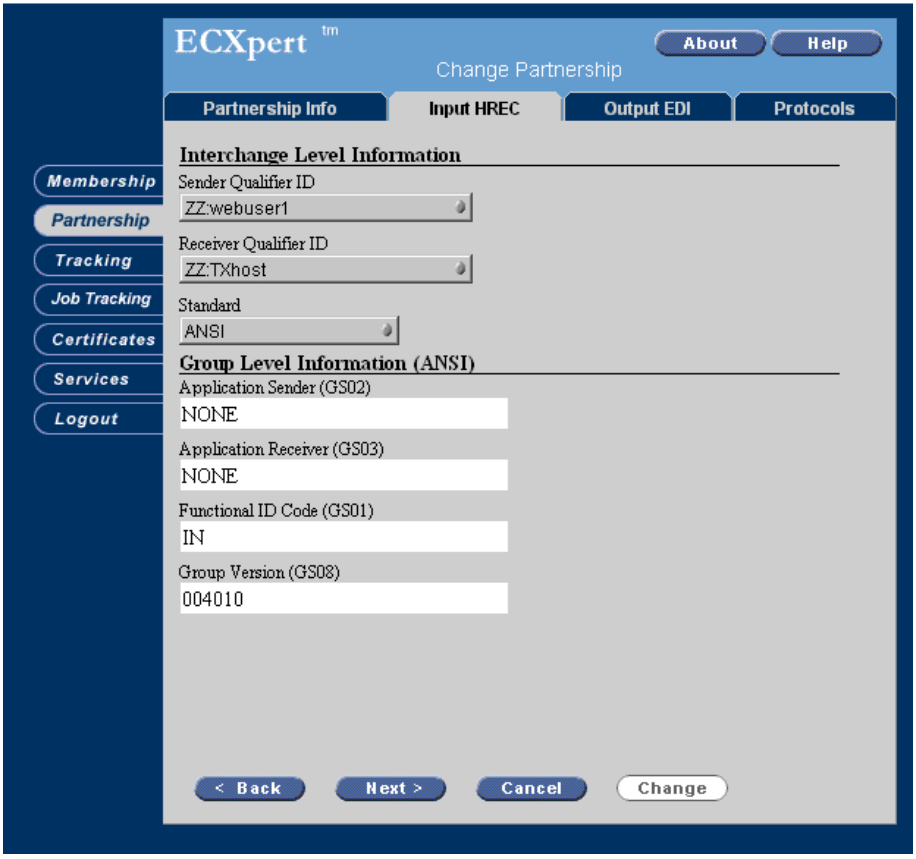


Table 3.7 Required Input HREC Information for submitting invoices

Item	Description
Interchange Level Information	
Sender Qualifier ID	**ZZ:TXwebuser1**—trading partner who will be sending you invoices through TradingXpert, based on your purchase orders to the associated company viewed through TradingXpert
Receiver Qualifier ID	**ZZ:TXhost**—ECXpert member set up to communicate with TradingXpert
Standard	**ANSI**
Group Level Information	
Application Sender	**<BLANK>**; ECXpert fills in this field with NONE.
Application Receiver	**<BLANK>**; ECXpert fills in this field with NONE.
Functional ID Code	**IN**
Group Version	**004010**

Figure 3.10 Output EDI for using TradingXpert to submit invoices

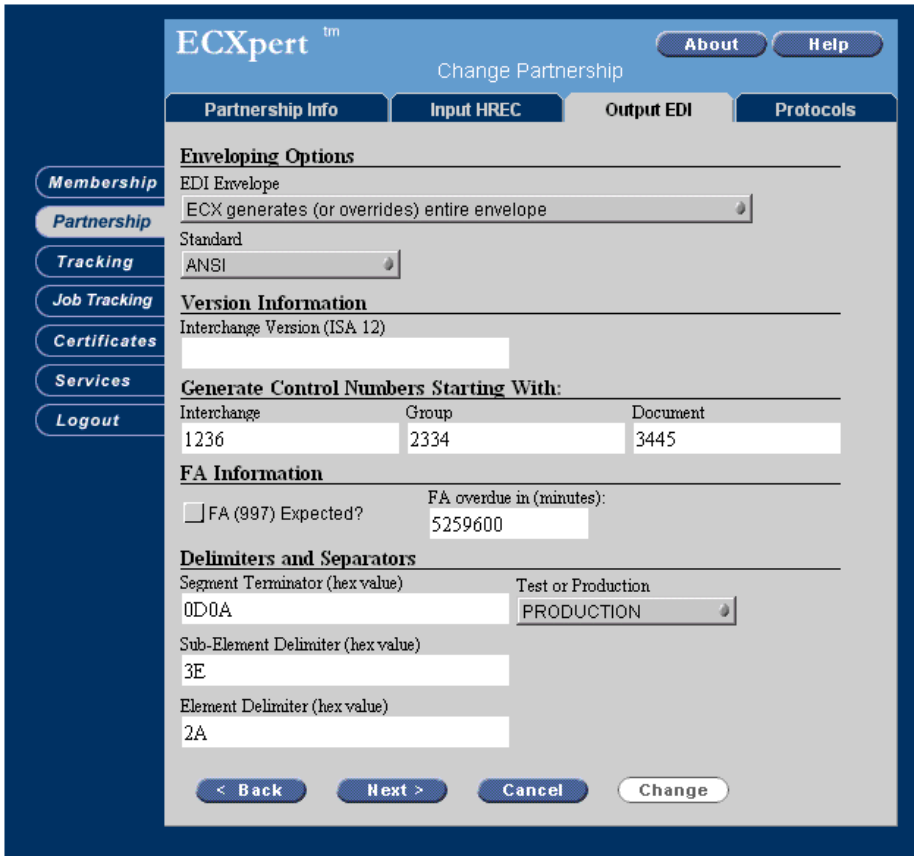


Table 3.8 Required Output EDI Information for submitting invoices

Item	Description
Enveloping Options	
EDI Envelope	**ECXpert generates (or overrides) entire envelope**
Standard	**ANSI**
[Remaining parameters]	Use the default values, or change them to meet your specific needs.

Figure 3.11 Protocols for using TradingXpert to submit invoices

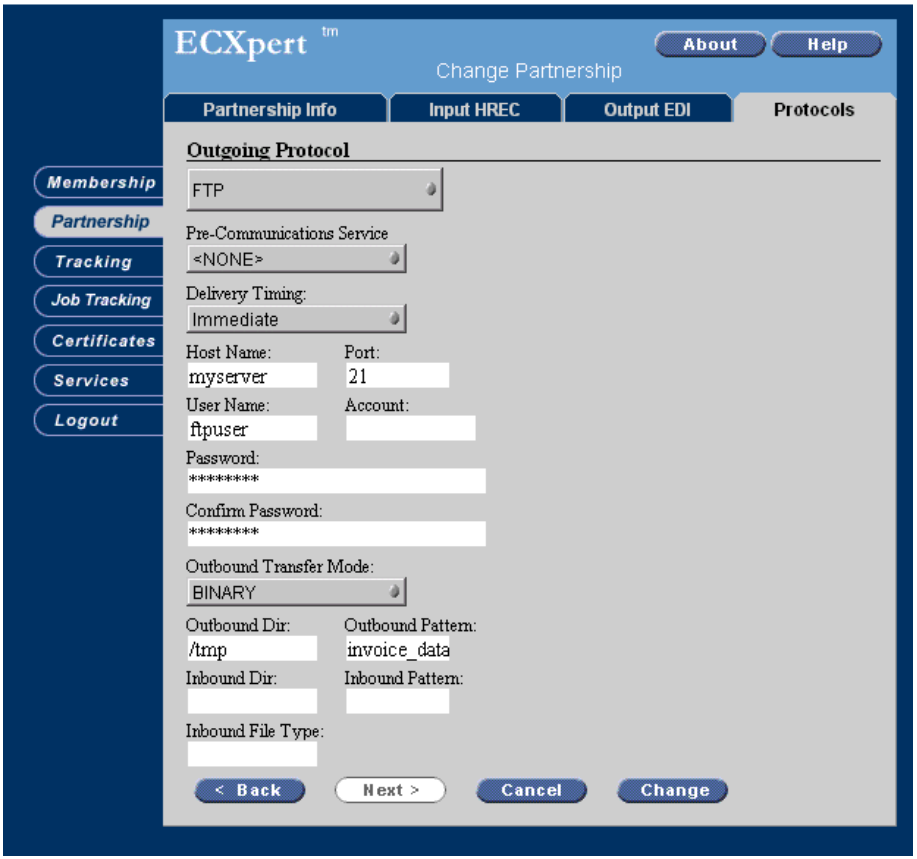


Table 3.9 Required Protocols for submitting invoices

Item	Description
Outgoing Protocol	
Pull-down protocol list	**FTP**
Precommunications Service	**<NONE>**
Delivery Timing	**Immediate**
Host Name	The name of the machine on which the invoice will be deposited.

Item	Description
Outgoing Protocol	
Port	The ftp port of the machine on which the invoice will be deposited, typically 21.
Username	The username you will use to log on to the machine on which the invoice will be deposited.
Password	The password for the user you entered in the Username field.
Confirm Password	The password for the user you entered in the Username field, entered a second time for confirmation.
Outbound Transfer Mode	**Binary**
Outbound Dir	The directory where the file will be deposited. In Figure 3.11 this is */tmp*, but it can be any directory you choose.
Outbound Pattern	**invoice_data**
[Remaining parameters]	You do not need to fill in the remaining fields on this screen.

Note You should also go to the ECXpert Server Administration interface to check that the ECXpert FTP server is on. For instructions, see your *iPlanet ECXpert Administrator's Guide*, Chapter 3.

Setup for Partner to Submit File Attachments

Figures 3.12-3.14 and the accompanying tables of screen details show how to set up ECXpert to allow "webuser1" to submit file attachments through TradingXpert.

Figure 3.12 Service List for using TradingXpert to submit file attachments

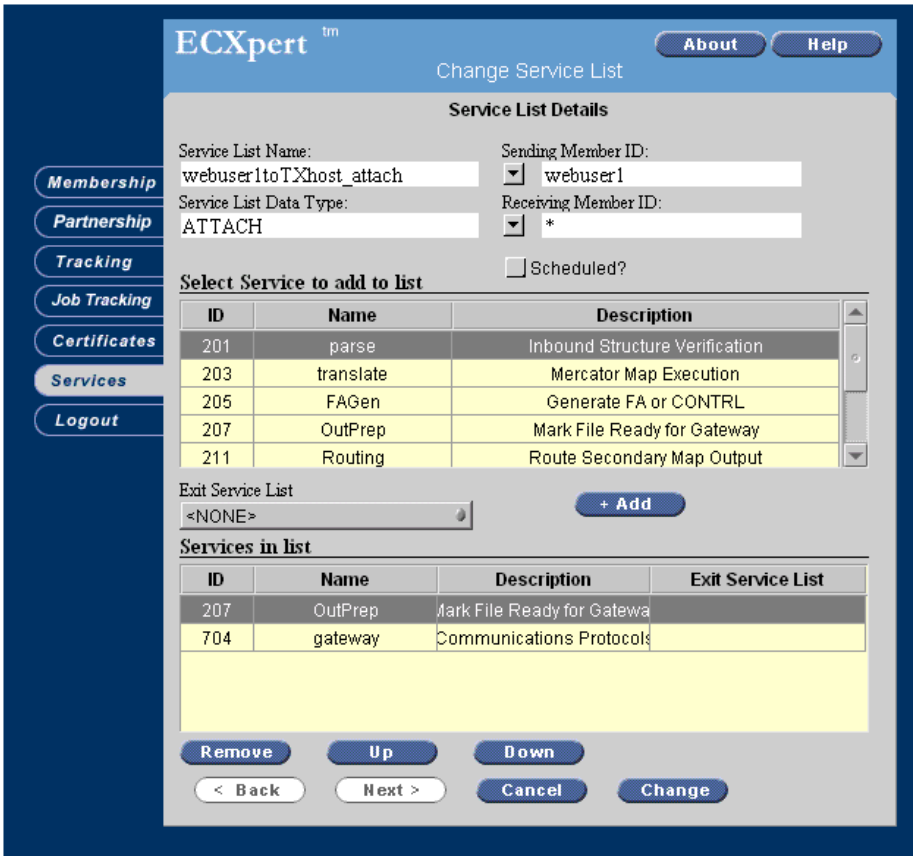


Table 3.10 Required Service List Details for submitting file attachments

Item	Description
	Service List Details
[Parameters]	Modify to meet your specific needs.
	Select Services to add to List
OutPrep	Marks files that do not need processing as ready for the Gateway service.
Gateway	Triggers the sending of finished submission units.

Figure 3.13 Partnership Info for using TradingXpert to submit file attachments

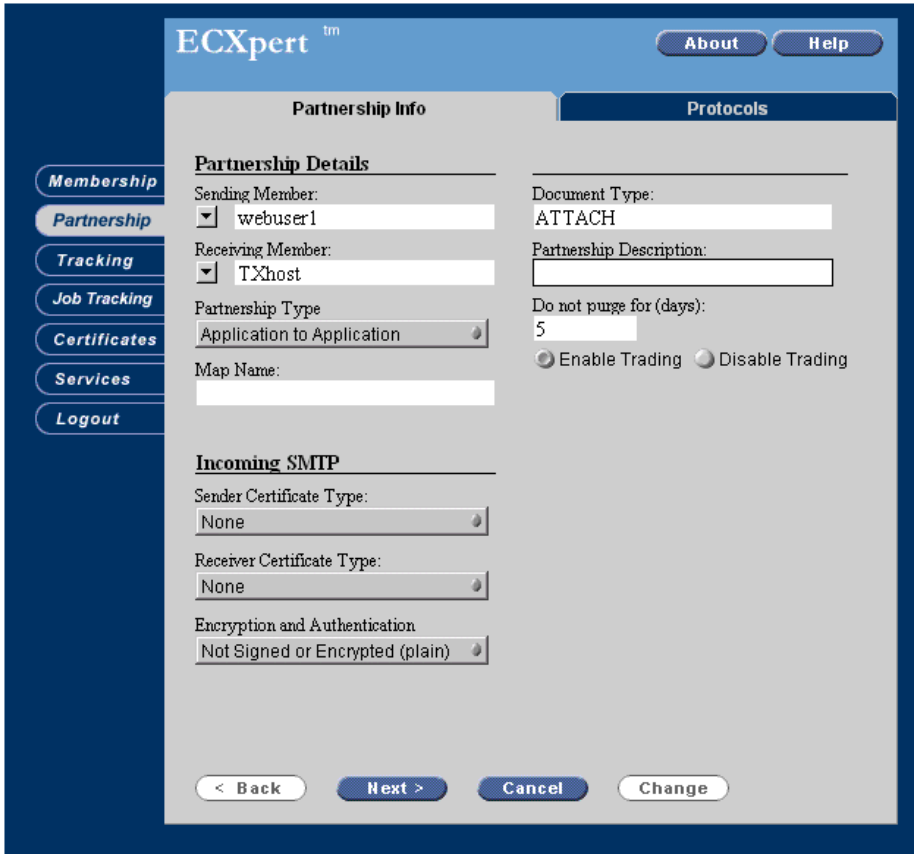


Table 3.11 Required Partnership Information for submitting file attachments

Item	Description
Partnership Details	
Sending Member	**webuser1**—trading partner who will be sending you file attachments through TradingXpert
Receiving Member	**TXhost**—ECXpert member set up to communicate with TradingXpert
Document Type	**ATTACH**
Partnership Type	**Application to Application**
Incoming SMTP	
[Parameters]	Use the default values, or modify them to meet your specific needs.

Figure 3.14 Protocols for using TradingXpert to submit file attachments

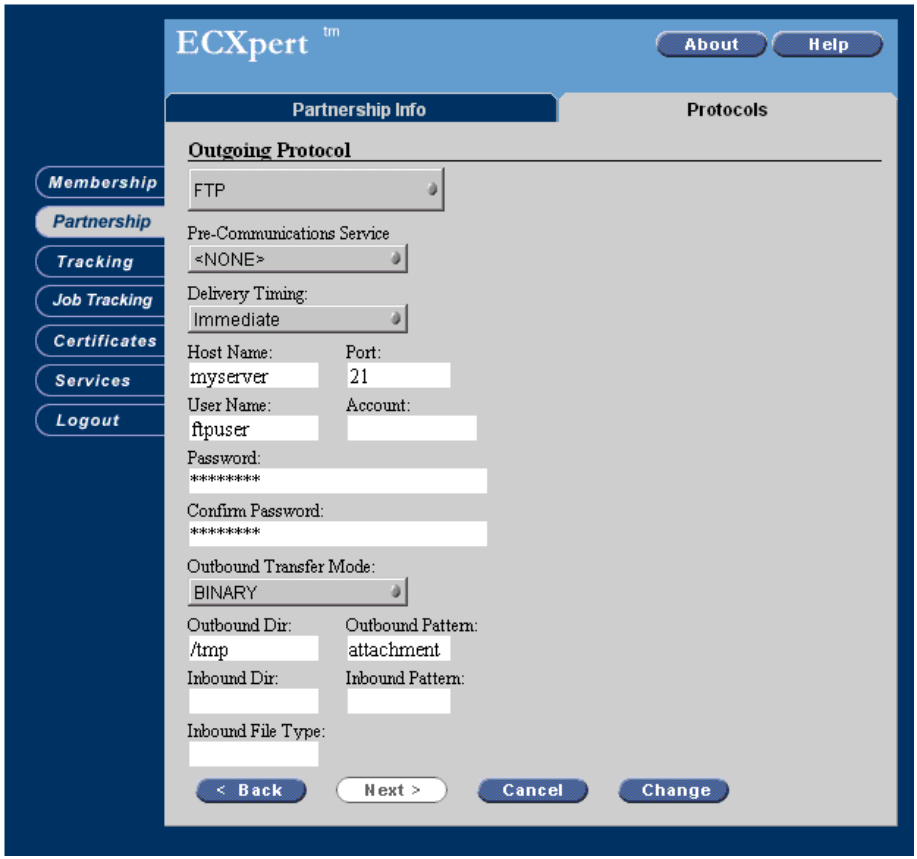


Table 3.12 Required Protocols for submitting file attachments

Item	Description
Outgoing Protocol	
Port	The ftp port of the machine on which the invoice will be deposited, typically 21.
Username	The username you will use to log on to the machine on which the invoice will be deposited.
Password	The password for the user you entered in the Username field.
Confirm Password	The password for the user you entered in the Username field, entered a second time for confirmation.

Item	Description
Outgoing Protocol	
Outbound Transfer Mode	**Binary**
Outbound Dir	The directory where the file will be deposited. In Figure 3.11 this is */tmp*, but it can be any directory you choose.
Outbound Pattern	**attachment**
[Remaining parameters]	You do not need to fill in the remaining fields on this screen.

Note You should also go to the ECXpert Server Administration interface to check that the ECXpert FTP server is on. For instructions, see your *iPlanet ECXpert Administrator's Guide*, Chapter 3.

Testing your Document Exchange Setup

Follow the steps below to use the ECXpert Document Submission Form to test your TradingXpert setup.

1. **Open the ECXpert user interface.**

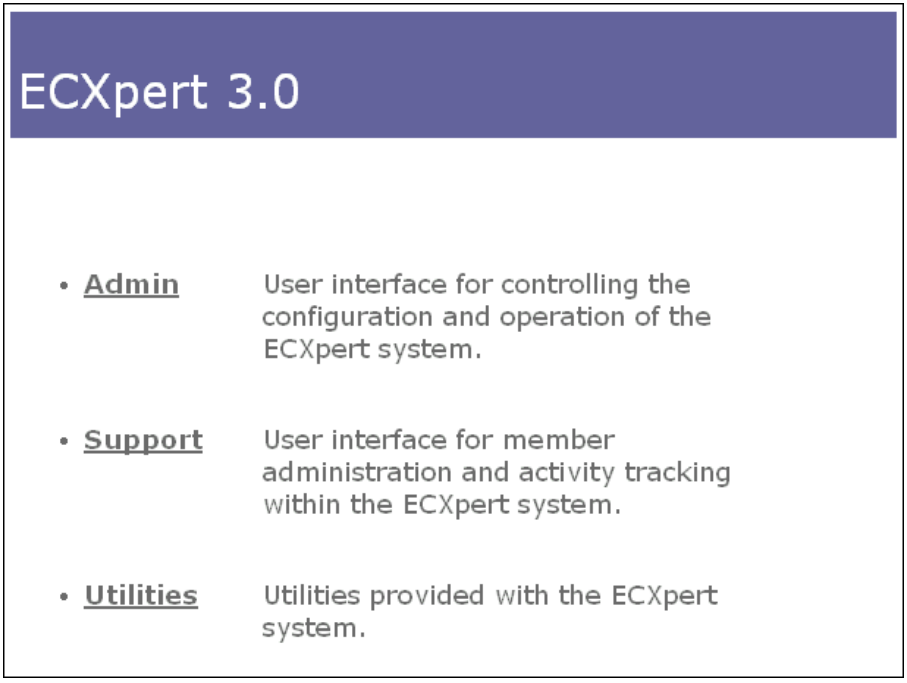
   Enter the following URL in your browser:

   http://<*ECXhostname*>:<*port*>/

   where <hostname> is the name of the host machine where ECXpert is installed, and <port> is the port number ECXpert is using.

   The ECXpert home page (Figure 3.15) appears.

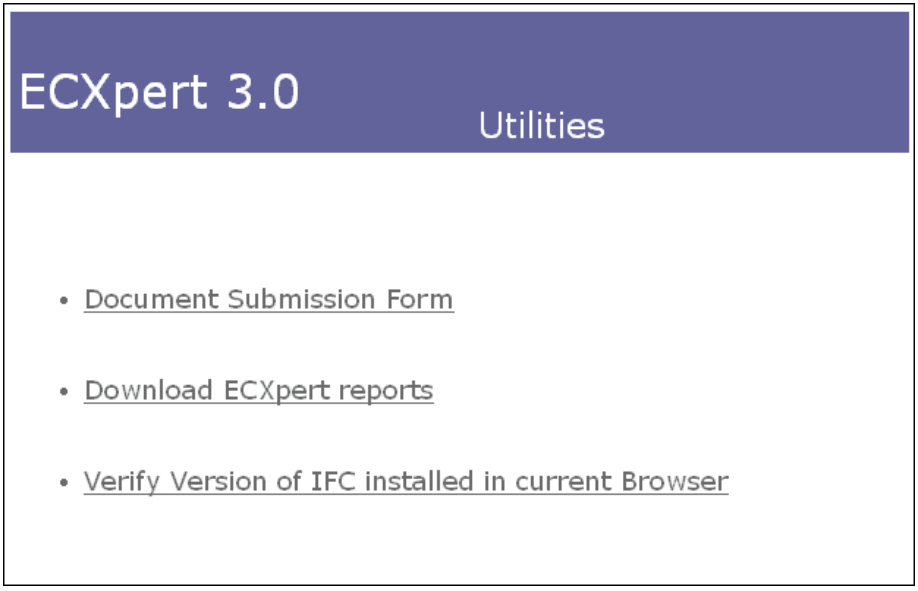
Figure 3.15 ECXpert home page



2. **Click the Utilities button.**

   The ECXpert Utilities Menu (Figure 3.16) appears.

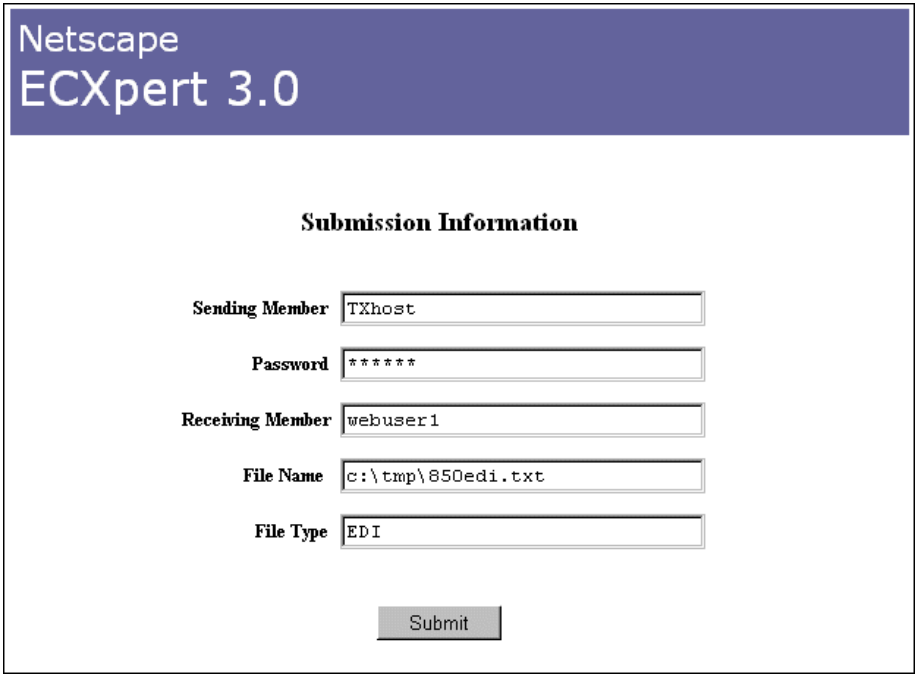
Figure 3.16 ECXpert Utilities Menu



3. **Click the Document Submission Form link.**

   The Document Submission Form (Figure 3.17) appears.

Figure 3.17 Document Submission Form



4. Enter parameters for the `submit` command.

Refer to Table 3.13 for detailed information about the parameters.

Table 3.13 Parameters for `submit` command

Parameter	Description
Sending Member	The member ID of the sending member defined in the associated partnership—**TXhost**.
Password	Password for the sending member—the password that you have set up for TXhost.
Receiving Member	The member ID of the receiving member defined in the associated partnership—**webuser1**.

Table 3.13 Parameters for `submit` command (Continued)

Parameter	Description
File Name	The name of a file to be submitted to TradingXpert (i.e., the submission unit). The demo file, which is included in the *\maps_etc\sampledata* directory, is named **850edi.txt** to represent a purchase order. You should also supply the full path to the location to which you have copied this file from the CD. In the picture above, the file is in the *\tmp* directory.
File Type	The Document Type for the file being passed to TradingXpert, as defined in the associated partnership—**EDI**.

5. **Click the Submit button.**

   A message appears providing feedback on the command. If any errors are encountered they are displayed first.

6. **Optionally, view the tracking information for your submission.**

   - Log into the TradingXpert Product Administrative Interface.
   - Click the Tracking button on the left.

     The Enter Search Constraints tab appears.
   - Set **Search Level** to **Document**.
   - Enter today's date.
   - Click the **Search** button.

7. **Open the TradingXpert user interface.**

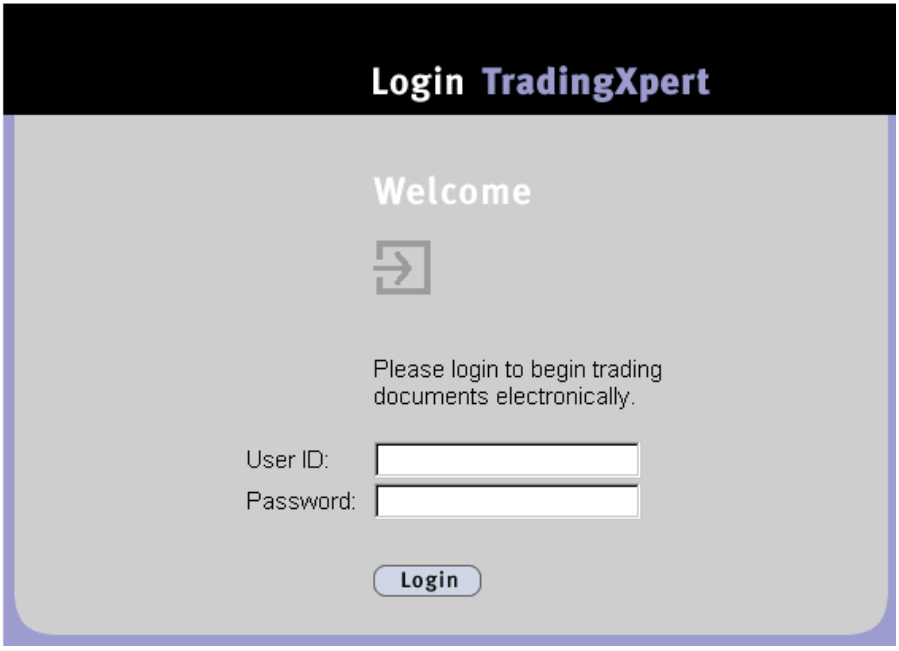
   Enter the following URL in your browser:

   http://<*TradingXperthostname*>:<*port*>/<*base*>

   where <hostname> is the name of the host machine where TradingXpert is installed, and <port> is the port number TradingXpert is using.

   The TradingXpert login screen (Figure 3.18) appears.

Figure 3.18 TradingXpert Login screen

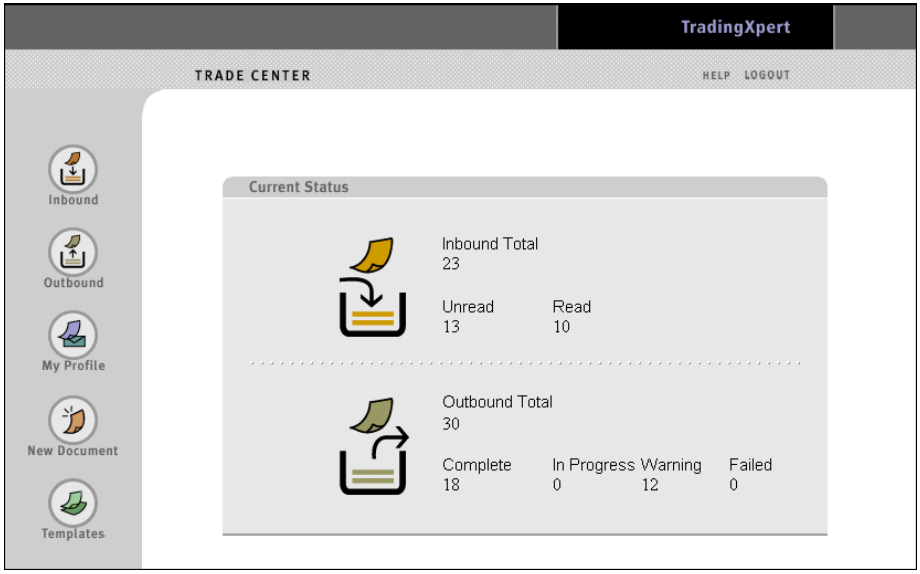


8. **Log into TradingXpert as webuser1.**

   Use the User ID *webuser1* and the Password *webuser1* and click **Login**.

   The Trade Center screen (Figure 3.19) appears.

Figure 3.19 Trade Center screen

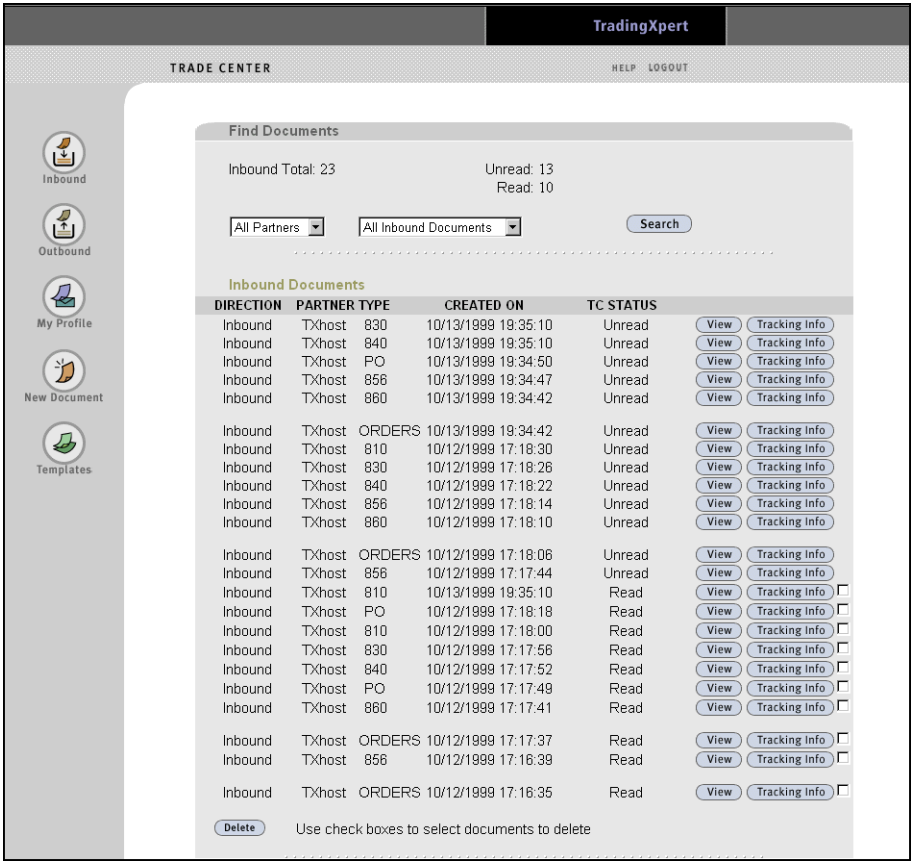


9. View the incoming purchase order.

Click the **Inbound** icon to view incoming documents.

In the screen (Figure 3.20) that appears, search for all incoming documents from TXhost, then view the purchase order just sent from TXhost.

Figure 3.20 Top of the Inbound Documents screen

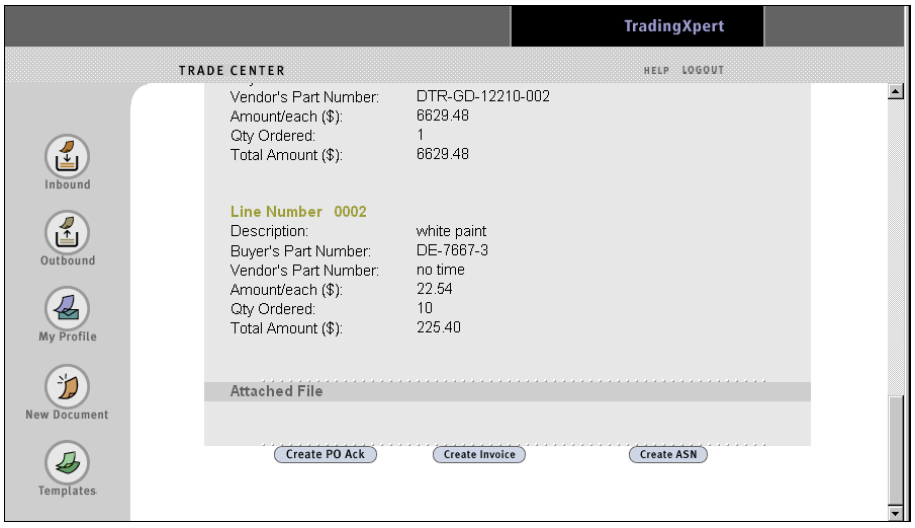


10. Create an invoice from the purchase order.

At the bottom of the purchase order, click the **Create Invoice** button. (See Figure 3.21)

An invoice form will appear; the data fields will be pre-filled with data from the purchase order.

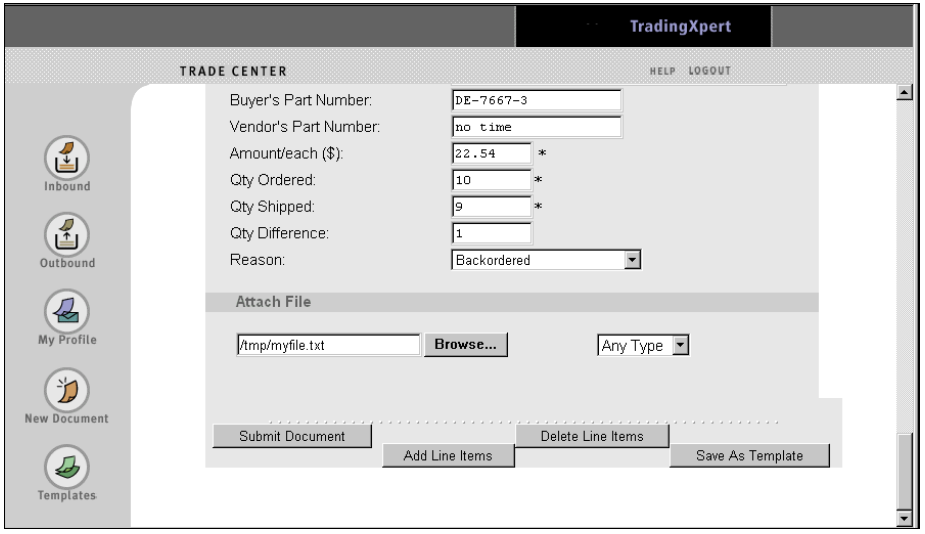
Figure 3.21 Bottom of a Purchase Order



11. Attach a file to the invoice.

At the bottom of the invoice screen is an Attach File section. Attach any file on your hard drive by first either entering the full path of the file or clicking Browse to select a file, and then selecting Any Type from the drop-down menu.

Figure 3.22 Attachment options at the bottom of an Invoice



12. **Submit the invoice with attachment to TXhost.**

    Click the **Submit Document** button. A screen will appear confirming that the document was submitted successfully.

13. **Verify receipt of the invoice and attachment in ECXpert.**

    - Return to the ECXpert home page at http://<*hostname*>:<*port*>/

      where <hostname> is the name of the host machine where ECXpert is installed, and <port> is the port number ECXpert is using.
    - On the ECXpert home page (Figure 3.15), click **Support**.
    - Enter the ECXpert administrator user name and password and click **Enter**.
    - Click the **Tracking** button, then enter search constraints to find the 810 sent by webuser1 to TXhost.
    - View tracking information for the inbound document and attached application file.

Customizing TradingXpert with NAB and Deploying Customizations to NAS

TradingXpert works with either the Netscape Application Builder (NAB) or the Netscape Application Server (NAS). Most commonly, customizations are developed with NAB and then deployed with NAS, following the steps below.

1. **Install a supported TradingXpert configuration based on NAB.**

   See "Planning Your Configuration" on page 12 for details on supported TradingXpert configurations. Make sure this installation is functioning properly.

2. **Start Netscape Application Builder 4.0.**

3. **Load the TradingXpert project by opening *FX.gxm* from the *<NASDIR>\Apps\Fx* directory.**

   Create your customizations to TradingXpert and test all your changes locally under NAB.

4. **Register and deploy your customizations to NAS.**

   To deploy the final changes to TradingXpert running on NAS, follow these steps:

   — Select **Project|Deploy**.

   — If your NAS instance is not already listed under **Registered Servers** in the Deploy Project dialog box, click **Register Server** and enter the correct NAS parameters.

   — Select the server and click **Deploy**.

   — Check the messages in the Messages Window to make sure that the files you modified made it to the NAS side.

5. **Restart NAS if any Java classes have been modified or added and test the changes on the NAS-based installation.**

Note You may have to copy the modified HTML files and images located in the *<NASDIR>\Apps\Fx\web* directory to the HTTP document directory where you have the corresponding files.

Appendix

A

TradingXpert Test Data Import Files

This appendix provides the following details about TradingXpert's optional import files for test data:

- Importing Test Data for Document Exchange
- Deleting Test Data for Document Exchange

Importing Test Data for Document Exchange

If you choose to import the necessary memberships, service lists, and partnerships for the test scenario using the import files provided on your installation disk, rather than set them up manually as detailed in "Setting up Test Data for Document Exchange" on page 73, perform the following tasks.

Note The import files provided on your installation disk are intended only to provide example data. The import files should not be modified except as instructed. Any further modifications to the file should performed at your own risk.

1. **Log in to the TradingXpert machine as the same user under which you installed NAS and TradingXpert.**

2. **Change to the *<NASDIR>\Apps\Fx\maps_etc\import* directory.**

   In the Command Prompt window, enter the following command:

   ```
   cd /d <NASDIR>\Apps\Fx\maps_etc\import
   ```

   where <*NASDIR*> is the directory in which NAS is installed.

3. **Make backup copies of the *tx-mem.imp* and *del-tx-mem.imp* files.**

4. **Edit the *tx-mem.imp* and *del-tx-mem.imp* files.**

   Using a text editor, do a global search and replace of the strings "ftphost," "ftpusername," "ftpuserpwd," and "outputdir" with the appropriate hostname, username, password, and the location of the output directory. These variables are used by the ftp protocol.

5. **Make sure BDGHOME is set to the location of the ECXpert installation.**

   — In the Control Panel of the machine on which ECXpert is installed, double-click the **System** icon, then click the **Environment** tab.

   — Verify the value of *BDGHOME*.

   Make sure the *BDGHOME* variable has the value

   ```
   <NSBASE>\NS-apps\ECXpert
   ```

   where <*NSBASE*> is the ECXpert installation directory.

   NAS will then use the same *ecx.ini* file that ECXpert uses.

6. Populate the database.

Use the ECXpert import utility, which is located at *<NSBASE>/bin/import*. For this TradingXpert demo, type the following command in the Command Prompt window:

```
<NSBASE>\bin\import ECX ECX
    <NASDIR>\Apps\Fx\maps_etc\import\tx-mem.imp
     c:\tmp\good c:\tmp\bad
```

where *<NSBASE>* is the directory in which ECXpert is installed; ECX is both the username and the password of the ECXpert administrator; *<NASDIR>\Apps\Fx\maps_etc\import\tx-mem.imp* is the location of the import file that will populate the TradingXpert members, partnership, and service lists; *c:\tmp\good* is the log file that records successful data imports; and *c:\tmp\bad* is the log file that records rejected data.

Note The import file is not perfect. You will see the following error messages after running the import command line:

```
BDGPNView::PutFA: Don't know FA type for NONE
BDGPNView::PutFA: Don't know FA type for NONE
```

You will also see that one record is rejected: the EDIFACT INVOIC partnership was not imported correctly. To remedy this, log in to the ECXpert Admin user interface and perform the following tasks:

- Select the partnership of Doc Type INVOIC.
- Select the Output EDI tab.
- Change the Standard from ANSI to EDIFACT.
- In the Version Number field, type "D."
- In the Release Number field, type "97A."
- Save the partnership.

Deleting Test Data for Document Exchange

To clean up the database and erase all the TradingXpert members, partnerships, and service lists that you just created, follow these steps:

1. **Log in to the TradingXpert machine as the same user under which you installed NAS and TradingXpert.**

2. **Erase the TradingXpert test data in the database.**

   Use the ECXpert import utility, which is located at *<NSBASE>/bin/import*. Type the following command in a Command Prompt window:

   ```
   <NSBASE>\bin\import ECX ECX
       <NASDIR>\Apps\Fx\maps_etc\import\del-tx-mem.imp
        c:\tmp\del-good c:\tmp\del-bad
   ```

   where *<NSBASE>* is the directory in which ECXpert is installed; ECX is both the username and the password of the ECXpert administrator; *<NASDIR>\Apps\Fx\maps_etc\import\del-tx-mem.imp* is the location of the import file that will delete the TradingXpert members, partnership, and service lists; *c:\tmp\good* is the log file that records successful data deletions; and *c:\tmp\bad* is the log file that records rejected data deletions.

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