



Agile Product Lifecycle Management

Installing Agile PLM for OAS

v9.2.2.3

Part No. E11900-01

January 2008

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CONTENTS

Copyright and Trademarks	ii
Installation Checklists	1
Pre-Installation Checklist.....	1
Application Server Installation Checklist	2
Clustered Application Server Installation Checklist.....	2
File Manager Installation Checklist.....	3
Web Proxy Server Installation Checklist	4
Product Interchange Installation Checklist	4
Upgrading to Agile PLM 9.2.2.1	7
Overview.....	7
Upgrading Agile Server Components	7
System Requirements for Upgrading	7
Checking Available Disk Space and Tablespace Size	8
Backing Up Files.....	8
Disabling Windows Services	8
Backing Up the Windows Registry	8
Upgrading the Database	9
Upgrading the Agile PLM 9.2.2.1 Application.....	9
Upgrading the File Vault.....	9
Upgrading the Agile PLM ActiveX Control	10
Upgrading Roles and Privilege Masks	10
Installing Agile PLM	11
Installation Process	11
Agile PLM System Requirements.....	12
Obtaining Software from Oracle E-delivery.....	13
Copying the Agile PLM Files	14
Starting the Agile PLM Installer	14
Installer Online Help	15
Installer Buttons.....	15
Agile PLM Components.....	16
Agile PLM Installation Folders.....	16

Agile PLM Windows Services.....	17
Agile PLM LDAP Authentication.....	17
Configuring the Agile Application Server.....	19
Overview.....	19
Copying the Oracle Application Server CD to the UNIX Server.....	19
Installing Oracle Application Server	20
Choosing Oracle Application Server Components to Install.....	20
Stopping Oracle Application Server	21
Installing the Oracle Application Server Patch	22
What To Do Next	22
Deploying the Agile Application.....	22
What To Do Next.....	23
Verifying Your Agile Application Server	23
Verifying the Agile Application Server Login.....	23
Checking Whether Agile Web Services Work	24
Checking Whether the Agile SDK Works	24
Configuring Oracle HTTP Server.....	26
Setting the Temp Directory.....	27
Recompiling Agile PLM JSP Files	28
Configuring Application Server Clusters	29
About Agile Application Server Clusters	29
Choosing Oracle Application Server Components to Install.....	30
Configuring the Repository Host Server.....	31
Installing Agile PLM on the Repository Host Server	31
Configuring Non-Repository Host Servers	32
Deploying the Agile Application.....	33
What To Do Next.....	34
Starting the Agile Cluster.....	34
Configuring the Load Balancer.....	34
What To Do Next.....	35
Configuring jndiurl.properties and pcclient.jnlp	35
Testing the Agile Cluster	36
Web Client.....	36
Java Client.....	36
Load Balancer	37
Troubleshooting.....	37
Configuring the File Manager.....	39
About File Management	39

Distributed File Managers.....	39
Deployment Configurations	40
Configuring the File Manager	43
Reconfiguring File Manager After Setting Up a Web Proxy Server	46
Starting the File Manager	46
Validating the File Manager Installation	47
Configuring a Web Proxy Server for Agile PLM.....	49
Overview.....	49
Agile Internet Security	49
Recommended Security Practices	49
Configuring Internet Information Server	50
Firewall Configuration.....	50
Deployment Scenarios in the DMZ.....	50
Configuring IIS as a Proxy Server for Agile PLM	52
Testing the Configuration	53
Configuring IIS as a Proxy Server for Agile File Manager.....	53
Testing the Configuration	55
Configuring Apache Web Server as a Proxy Server for Agile PLM and Agile File Manager	55
Configuring Apache Web Server on Solaris	56
Configuring Apache Web Server on Linux	57
Configuring Apache Web Server on AIX	59
Enabling Debugging Information for the Jakarta Tomcat Connector.....	60
Logging In to the Agile Web Client.....	61
Troubleshooting the Agile Web Client.....	61
Confirming Accessibility.....	61
URL Error Messages	61
Log Files (Disk Space)	61
Connection Refused or Server is Busy Error Message	62
Changing Logging Priority	62
Configuring the Microsoft Excel-based Client for Agile PG&C	63
Overview of the Microsoft Excel-based Client for Agile PG&C	63
JGPSSI Support	64
Substances and Weights Rollups.....	64
Client Software Requirements.....	64
Microsoft Excel-based Client FAQ	65

Configuration Sequence	67
Setting Privileges for Agile PG&C Objects	67
Enabling Attributes that are Required for Excel Rollups	69
Classes: Parts, Manufacturer Parts, and Documents	69
Classes: Parts and Documents	69
Restricting the Length of Declaration Names	70
Deploying License Files for the Agile PLM ActiveX Control	71
Using the Developer Version of the Microsoft Excel Integration License File	72
Digitally Signing the Agile PLM ActiveX Control	72
Enabling Downloading of Productivity Components	73
Installing the Agile PLM ActiveX Control	73
Modifying Excel-based Process Extensions for Japanese Versions	74
Supporting the Japanese Version of the JGPSSI Template	74
Supporting the Japanese Version of Substances and Weights Rollups	74
Supporting Other Languages in Substances and Weights Rollups	75
Testing the Microsoft Excel-based Client for Agile PG&C	76
Troubleshooting	78
Configuring Agile Product Portfolio Management	81
Overview	81
PPM Post Upgrade Utility	81
Running the PPM Post Upgrade Utility	82
Installing and Configuring Agile Java Client	85
Agile Java Client Requirements	85
Installing the Agile Java Client	85
Running Agile Java Client 9.0 and Agile Java Client 9.2.2.1 on the Same Computer	86
Reconfiguring Java Client JNLP Files	86
Modifying the JNLP Files	86
Opening Multiple Java Clients	88
Configuring Agile Product Interchange	89
Overview	89
Requirements	89
Configuring the Apache Tomcat Service	90
Testing the Installation	91
Using the Agile Product Interchange DataLoad Utility	91
Unpacking and Configuring the Agile Product Interchange DataLoad Utility	91
Data File Formats	92
Loading Manufacturer Aliases	94
Loading Manufacturer Part Number Aliases	95

Loading Manufacturer Codes	95
Loading Commodity Codes	96
Getting Aliases for Manufacturers and Manufacturer Parts.....	96
Agile PLM Installer Panels	99
Common Agile PLM Installer Panels.....	99
Database Server Panels	100
Application Server Panels	101
Web Server Panels	102
Viewer Panels.....	103
File Manager Panels	103
Directory Server Panels	105
Product InterChange Panels	105
Agile Application Server Scripts.....	107
Installation and Configuration Scripts.....	107
Application Scripts.....	108
File Vault Utilities	108
iFSReorgV2	108
MetaFilesRemover	109
MetaltemGenerator	109
metaUtility.....	110
VaultSimulation	110
DeadFilesLocator	110
MissingFilesLocator.....	111
FixVault	111
Agile PLM Service Pack Installation.....	113
Install and Test Notice.....	113
Installing an Agile PLM Service Pack on Windows	113
Upgrade Requirements	113
Operating System.....	113
Supported Application Upgrade Path	113
Upgrading the File Manager.....	113
Upgrading the SDK Client	114
Upgrading the Application Server.....	114
Post-Installation Verification	116
Installing an Agile PLM Service Pack on UNIX	116

Upgrade Requirements	116
Operating System.....	116
Supported Application Upgrade Path	116
Upgrading the File Manager	116
Upgrading the SDK Client	117
Upgrading the Application Server.....	118
Post-Installation Verification	119
Integrating Agile PLM 9.2.2.x with Agile Viewer 19.x.....	119
AutoVue 19.2 on Windows with Agile PLM 9.2.2.x on Windows.....	119
AutoVue 19.2 on Windows with Agile PLM 9.2.2.x on UNIX	120
AutoVue 19.1 Windows and Unix.....	120
Agile e-PDM Integration	125
Configuring Agile PLM.....	125
Configuring Agile e-PDM.....	126
Agile System Maintenance.....	129
Using the Server as a Client.....	129
Performance Tuning	129
Tuning JVM Parameters.....	129
Tuning Oracle HTTP Server.....	130
Configuring Database Access using Agile Administrative Settings	131
Configuring Your Firewall	132
Color Settings	132
Dynamic Versus Static IP Addresses.....	132
Checking Your TCP/IP Connection	132
Configuring Browsers on Client Computers	133
Uninstalling Agile PLM	133
Tuning Memory for Java Applets	135
Java Control Panel	136
Frequently Asked Questions	136

Preface

The Oracle|Agile documentation set includes Adobe® Acrobat™ PDF files. The [Oracle Technology Network \(OTN\) Web site](http://www.oracle.com/technology/documentation/agile.html) (<http://www.oracle.com/technology/documentation/agile.html>) contains the latest versions of the Oracle|Agile PLM PDF files. You can view or download these manuals from the Web site, or you can ask your Agile administrator if there is an Oracle|Agile Documentation folder available on your network from which you can access the Oracle|Agile documentation (PDF) files.

Note To read the PDF files, you must use the free Adobe Acrobat Reader™ version 7.0 or later. This program can be downloaded from the [Adobe Web site](http://www.adobe.com) (<http://www.adobe.com>).

The [Oracle Technology Network \(OTN\) Web site](http://www.oracle.com/technology/documentation/agile.html) (<http://www.oracle.com/technology/documentation/agile.html>) can be accessed through Help > Manuals in both the Agile Web Client and the Agile Java Client. If you need additional assistance or information, please contact [support](http://www.oracle.com/agile/support.html) (<http://www.oracle.com/agile/support.html>) (<http://www.oracle.com/agile/support.html>) for assistance.

Note Before calling Agile Support about a problem with an Oracle|Agile PLM manual, please have ready the full part number, which is located on the title page.

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Readme

Any last-minute information about Oracle|Agile PLM can be found in the Readme file on the [Oracle Technology Network \(OTN\) Web site](http://www.oracle.com/technology/documentation/agile.html) (<http://www.oracle.com/technology/documentation/agile.html>).

Agile Training Aids

Go to the [Oracle University Web page](http://www.oracle.com/education/chooser/selectcountry_new.html) (http://www.oracle.com/education/chooser/selectcountry_new.html) for more information on Agile

Training offerings.

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Installation Checklists

This chapter includes the following:

▪ Pre-Installation Checklist	1
▪ Application Server Installation Checklist	2
▪ Clustered Application Server Installation Checklist	2
▪ File Manager Installation Checklist	3
▪ Web Proxy Server Installation Checklist	4
▪ Product Interchange Installation Checklist	4

Pre-Installation Checklist

Before installing the Agile PLM software, you need to log in to your machine with local Administrator privileges and check the following:

- ☐ Can you ping all servers, including the database server, on which you plan to install Agile PLM components? For example, try pinging the database server from the application server.
- ☐ Have you verified the Domain Name System (DNS) host name of each server on which you plan to install Agile PLM components? In DNS, the fully qualified domain name consists of the hostname, then a period, then the domain name.

Note	When you are prompted by the Agile PLM installer to enter a host name, enter the fully qualified domain name of the server.
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- ☐ If you are installing an application server cluster, have you ensured that all application servers and the load balancer are registered in the same domain?

Note	You cannot distribute Agile PLM application servers across multiple domains.
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- ☐ Is your Agile PLM database server installed and running on a separate machine?
- ☐ Is Oracle Application Server 10g (10.1.2.0.2) installed or have you copied the CDs onto the machine where you are installing the Agile Application Server?
- ☐ If you are using LDAP-based authentication for Agile PLM, is your Directory Server installed?
- ☐ Have you verified that you have read, write, and execute permissions for the computer on which you want to install Agile PLM?

Additionally, if you are upgrading:

- ☐ Have you backed up the files on your File Manager server?
- ☐ Have you uninstalled the previous version of Agile?

Note You must be able to complete this checklist before installing Agile PLM.

Application Server Installation Checklist

Follow these steps to install the Agile Application Server:

- ☐ Install Oracle Application Server 10g (10.1.2.0.2) J2EE.
See "[Installing Oracle Application Server](#) (on page 20)".
- ☐ Stop the Oracle Application Server.
See "[Stopping Oracle Application Server](#) (on page 21)".
- ☐ Install the Oracle Application Server patch.
See "[Installing the Oracle Application Server Patch](#) (on page 22)".
- ☐ Install the Agile PLM **Application Server** component.
See "Installing Agile PLM."

Note The Agile PLM installer may prompt for you to stop Oracle Application Server even though it is already stopped. If so, Click OK to continue.

- ☐ On Windows: Restart the server.
- ☐ Deploy the Agile application on Oracle Application Server.
See "[Deploying the Agile Application](#) (on page 22)".
- ☐ Verify that the Agile Application Server is working properly.
See "[Verifying Your Agile Application Server](#) (on page 23)".
- ☐ (Optional) Configure a Web proxy server for your Agile PLM system.
To install the Oracle Application Server plug-in and other files needed to use Microsoft Internet Information Services (IIS) as your Web proxy server, install the Agile PLM **Web Proxies** component on your Web server. See "Installing Agile PLM."
To configure your Web proxy server, see "Configuring a Web Proxy Server for Agile PLM."

Clustered Application Server Installation Checklist

Follow these steps to install an Agile Application Server cluster:

- ❑ Install Oracle Application Server 10g (10.1.2.0.2) J2EE and Farm Repository on each server.

Important Make sure all servers in the cluster use the same operating system.

Important During the installation, the repository host ID is displayed. Write it down. You will need to provide the repository host ID during the installation of Oracle Application Server on the non-repository host servers.

See [About Agile Application Server Clusters](#) (on page 29) and [Installing Oracle Application Server](#) (on page 20)".

- ❑ Stop Oracle Application Server on each machine in the cluster.

See [Stopping Oracle Application Server](#) (on page 21)".

- ❑ Configure the cluster on the repository host.

See [Configuring the Repository Host Server](#) (on page 31)".

- ❑ Configure the cluster on each non-repository host.

See [Installing Agile PLM on the Repository Host Server](#) (on page 31)".

- ❑ Install the Agile PLM **Application Server** component on the repository host server.

See "Installing Agile PLM."

Note	The Agile PLM installer may prompt for you to stop Oracle Application Server even though it is already stopped. If so, Click OK to continue.
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- ❑ Deploy the Agile application on the repository host server.

See [Deploying the Agile Application](#) (on page 22)".

- ❑ Configure a Web proxy server or a load balancer for your Agile PLM system.

On Windows, IIS is not supported as a Web proxy server for an OAS cluster, so a load balancer is recommended.

For information about configuring a Web proxy server, see [Configuring a Web Proxy Server for Agile PLM](#) (on page 49).

For information about configuring a load balancer, see "Configuring the Load Balancer".

- ❑ **On Solaris or Linux or AIX:** Configure the JNLP MIME type.

See [Configuring the JNLP MIME Type on U](#) (see "Configuring the JNLP MIME Type on UNIX" on page 37)NIX".

- ❑ If you configured a Web proxy server for your Agile PLM system, you must configure the Agile application on all non-repository host servers.

See [Configuring jndiurl.properties and pcclient.jnlp](#) (on page 35)".

- ❑ Verify that the Agile cluster is working properly.

See [Testing the Agile Cluster](#) (on page 36)".

File Manager Installation Checklist

Follow these steps to install the File Manager:

- ☐ If you are upgrading to Agile PLM 9.2.2.1 from a release prior to Agile 9, back up and reorganize your file vault.
See "Upgrading the File Vault".
- ☐ Install the Agile PLM **File Manager** component.
See "Installing Agile PLM."
- ☐ Start the Agile Application Server.
- ☐ (Optional) Configure a Proxy Server for the File Manager.
See "Configuring a Web Proxy Server for Agile PLM."
- ☐ Configure the File Manager.
See "[Configuring the File Manager](#) (on page 39)".
- ☐ Start the File Manager.
See "[Starting the File Manager](#) (on page 46)".
- ☐ Verify that the File Manager is working properly.
See "[Validating the File Manager Installation](#) (on page 47)".

Web Proxy Server Installation Checklist

Follow these steps to configure a Web proxy server in your company's DMZ for the Agile Application Server and Agile File Manager:

- ☐ Stop your Web server.
- ☐ Install the Agile PLM **Web Proxies** component.
See "Installing Agile PLM."
- ☐ Configure your Web server to be a proxy server for either the Agile Application Server, the Agile File Manager, or both.
See "Configuring a Web Proxy Server for Agile PLM."
- ☐ Test the connection by logging into the Agile Web Client.
See "Logging In to the Agile Web Client".

Product Interchange Installation Checklist

Follow these steps to install Agile Product Interchange:

- ☐ Install the Agile Product Interchange database.
See the *Agile PLM Database Installation Guide*.

- ❑ Install the Agile Product Interchange application.
See "Installing Agile PLM."
- ❑ Configure the Apache Tomcat service.
See "[Configuring the Apache Tomcat Service](#) (on page 90)".
- ❑ Test the installation by going to the Agile Product Interchange URL.
See "[Testing the Installation](#) (on page 91)".
- ❑ Use the Agile Product Interchange DataLoad utility to load customer data for manufacturer aliases, part aliases, and commodity codes.
See "[Using the Agile Product Interchange Dataload Utility](#) (on page 91)".

Upgrading to Agile PLM 9.2.2.1

This chapter includes the following:

▪ Overview.....	7
▪ Disabling Windows Services.....	8
▪ Backing Up the Windows Registry.....	8
▪ Upgrading the Database.....	9
▪ Upgrading the Agile PLM 9.2.2.1 Application	9
▪ Upgrading the File Vault	9
▪ Upgrading the Agile PLM ActiveX Control	10
▪ Upgrading Roles and Privilege Masks.....	10

Overview

Agile PLM can be distributed over a wide-area network with multiple servers, or it can be limited to a single server with several client computers.

Important Before upgrading to Agile PLM 9.2.2.1, read through this entire chapter and the Readme for the latest information. For information about optional upgrade services available from Agile, contact Agile Technical Support.

Note	All folder names and paths show the default settings provided during installation. Your system structure may be different if folder names or paths were changed during the Agile PLM 9.2.2.1 installation.
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Upgrading Agile Server Components

Before you upgrade any components, you should make sure that all components in the Agile system work and communicate properly. Performing an upgrade on a system that is not functioning correctly will compound troubleshooting techniques.

Important Refer to the *Agile PLM Database Upgrade Guide* for schema upgrade requirements.

System Requirements for Upgrading

Additional hard disk space may be required for upgrading to Agile PLM 9.2.2.1 and your Agile PLM database efficiently. Before you can install Agile PLM server components, you must have at least 60 MB of available disk space available where the OS is installed. It is also recommended that you have at least 100 MB of available disk space for the upgrade.

Checking Available Disk Space and Tablespace Size

Be sure you have enough unused disk space available on the computer where the database is installed before upgrading—at least 100 MB plus an amount equal to 100 percent of your current database and at least twice the size of your user-data tablespace.

Important Refer to the *Agile Database Installation Guide* for tablespace requirements.

Backing Up Files

Note	Agile PLM 9.2.2.1 installs into a new default location. If you accept this location, earlier Agile releases will not be overwritten.
-------------	--

Back up any existing ChangeCAST and other Agile-related folders to a safe location before upgrading any component to Agile PLM 9.2.2.1.

Disabling Windows Services

Before upgrading Agile on Windows servers, disable any Agile services.

To disable Agile services:

1. Ensure that all Agile services are stopped:
 - a. Choose Start > Settings > Control Panel.
 - b. double-click the Administrative Tools icon and then double-click the Services icon.
 - c. For each Agile service in the Services dialog box, select the service, right-click and choose Stop in the shortcut menu. Also for each service, open the Properties dialog box and change the Startup Type to Disabled.
 - d. You must also stop the IIS Admin service if it is running.
 - e. Close the Services dialog box.
2. Restart all Windows servers in the Agile PLM system.

Backing Up the Windows Registry

If you are upgrading Agile on Windows servers, the registry contains information created by the Agile installation program. You can backup registry branches so that you can return your system to its previous state.

Note	If you have disk space available, you can backup the entire registry (instead of specific branches) before upgrading to Agile PLM 9.2.2.1.
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To use regedit to backup registry branches:

1. Choose Start > Run.
2. Type regedit in the Open field of the Run dialog box.
The Registry window opens.

3. Expand the HKEY_LOCAL_MACHINE > Software tree and select the Agile registry branch.
4. Choose Registry > Export Registry File.
The Export Registry File dialog box appears.
5. Make sure the Agile branch appears in the Select Branch field.
6. Name the branch agilebranch, and save it to a secure location.
7. Select the Oracle registry branch and save it as oraclebranch to a secure location.

In the event you do not want to continue using this release of Agile PLM 9.2.2.1, you can import these registry branches, and then restart the computer.

Upgrading the Database

The Agile database must be upgraded before installing the Agile Application Server. Refer to the *Agile PLM Database Upgrade Guide* for details about upgrading the Agile PLM 9.2.2.1 database

Upgrading the Agile PLM 9.2.2.1 Application

After upgrading to the Agile PLM 9.2.2.1 database, you should uninstall the previous version of Agile before installing Agile PLM 9.2.2.1.

Important Do not install into the same folder used by the previous implementation of Agile. Choose a new installation location.

Upgrading the File Vault

If you are upgrading to Agile PLM 9.2.2.1 from a version prior to 9.2, the file vault has been redesigned. In previous versions of Agile, files were stored in the <iFS Root> or files directory. In the new design, files are stored in separate directories based on a file ID. All existing files must be reorganized to conform to the new design specifications. If you have an existing distributed iFS or distributed file manager (DFM) configuration, you must reorganize the files on each file server.

To reorganize existing files:

1. Back up any existing Agile iFS folders to a safe location before upgrading any component to Agile PLM 9.2.2.1. The default location for Agile iFS Files in Agile 8.5 is [\\Program Files\Agile Product Collaboration\iFS\Files](#).
If you have an existing distributed configuration, you must also back up the files on all the secondary file servers.
2. After you have copied all files into a backup directory, install the new File Manager by following the instructions in "Starting the Agile PLM Installer" if it is not already installed.
3. Copy any iFS files that you backed up into the File Manager Storage Location you specified during the file manager installation.
4. Go to the agile_home\agileDomain\tools\ directory.
5. Run the iFSReorgV2.jar file:

Usage: java -jar ifsReorgV2.jar -basedir <value> -oldFilePrefix <value>
[-newFilePrefix <value>] [-logging <true/false>]

where

- basedir is the file vault location to be reorganized
 - oldFilePrefix is the old file name prefix for the existing files in the vault
 - newFilePrefix is the new file name prefix. All of the existing files will be renamed with this prefix. This is an optional argument. If it is not specified, the old file name prefix is used.
 - logging enables logging of warnings or errors if set to true. The log is saved to a file named ifsReorg.log.
6. After the program completes, the reorganization information displays.
 7. Go to ["Configuring the File Manager"](#) (see "Configuring the File Manager" on page 39) to configure the new file manager with the upgraded vault information and to validate the installation was successful.

Upgrading the Agile PLM ActiveX Control

If you used the Microsoft Excel-based client to open Agile PLM 9.2 Declarations in Microsoft Excel, you have the Agile PLM ActiveX Control (version 1.0.313.1) installed on your client computer. Agile PLM 9.2.2.1 uses a later version (1.0313.8) of the Agile PLM ActiveX Control.

Optionally, you can uninstall the older Agile PLM ActiveX Control. If the Agile PLM preference Allow Downloading of Productivity Components is set to Yes, the next time you use the Agile Web Client to open a Declaration in Microsoft Excel, the latest version of the Agile PLM ActiveX Control will be downloaded and installed automatically.

Note	Before uninstalling the Agile PLM ActiveX Control, close Microsoft Excel.
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Upgrading Roles and Privilege Masks

When you upgrade your Agile PLM database, any existing Agile PLM roles and privilege masks that your company uses are not automatically updated to include new privileges and attributes. The Agile PLM administrator must update existing roles and privilege masks manually using the Agile Java Client.

Agile PLM includes a number of example roles that you can use to modify your own roles. They are stored under the Examples node folder in Java Client. Example roles are read-only and cannot be modified. However, you can use Save As to make a copy of an example role and modify the copy.

Example roles include example privilege masks. When you use Save As to create a copy of an example role, the system populates the new role with the privilege masks.

For more information on how to edit roles and privilege masks, see the *Agile PLM Administrator Guide*.

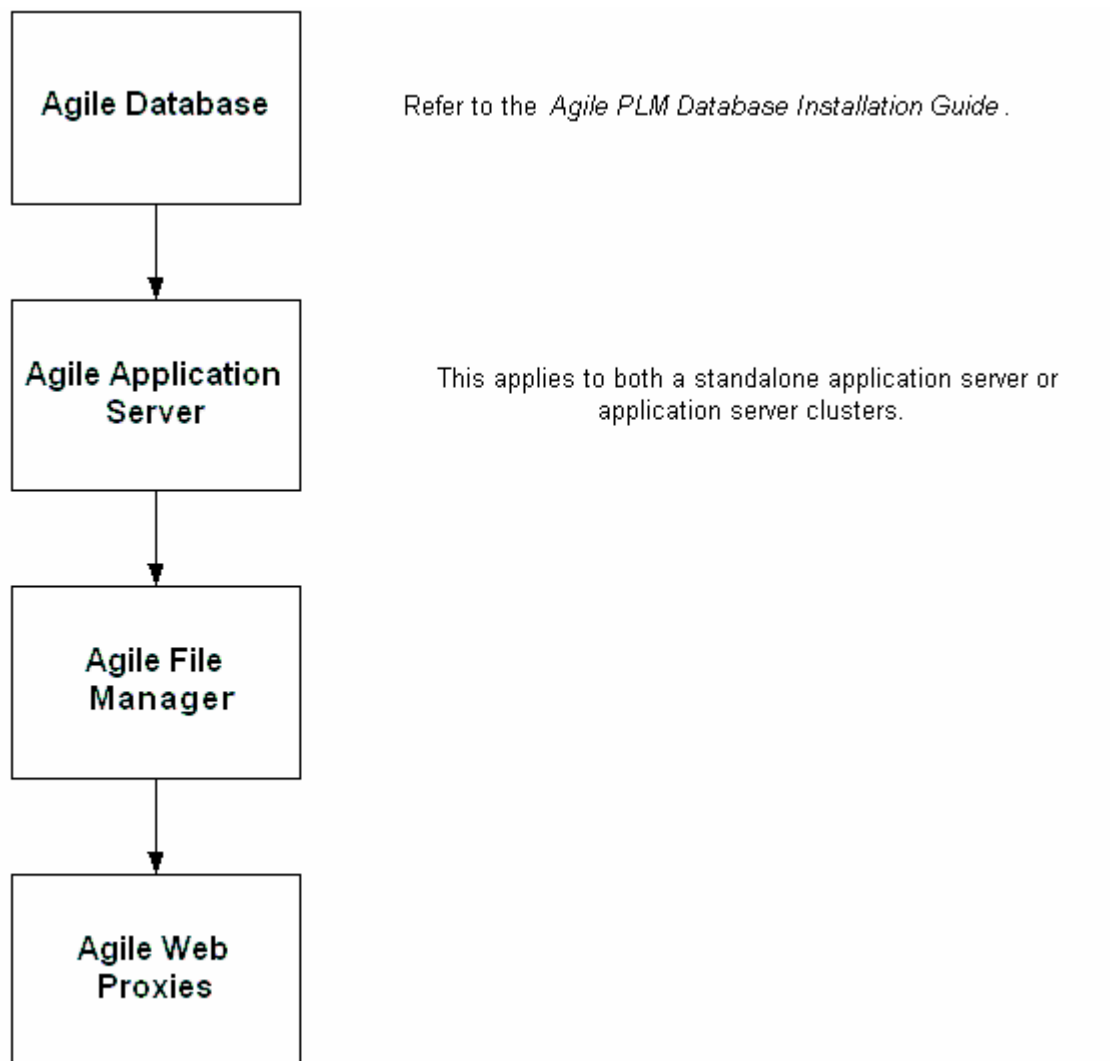
Installing Agile PLM

This chapter includes the following:

▪ Installation Process.....	11
▪ Agile PLM System Requirements	12
▪ Obtaining Software from Oracle E-delivery	13
▪ Copying the Agile PLM Files.....	14
▪ Starting the Agile PLM Installer	14
▪ Agile PLM Components.....	16
▪ Agile PLM Installation Folders	16
▪ Agile PLM Windows Services	17
▪ Agile PLM LDAP Authentication	17

Installation Process

Agile PLM is designed to run optimally on multiple computers. This guide is presented with separate chapters for certain Agile PLM components. To set up an Agile PLM system, you should install the components in the following order:



Important If you are upgrading from a previous version of Agile PLM, first read “[Upgrading to Agile PLM 9.2.2.1](#) (on page 7)”

Agile PLM System Requirements

Depending on the size and type of network system in each site, Agile PLM may be deployed in different configurations. The amount of time required to complete an installation depends on the complexity of your Agile PLM implementation.

Note	If you are installing on Windows, make sure you have installed all Windows updates, especially for the DirectX component.
------	---

For installations using a certified localized language, all server components must be installed on computers running the same localized OS. Clients can be running on the same localized OS or English OS. For detailed information about using Agile PLM with international operating systems, contact the Agile Support Web site.

The general recommended configuration for Agile PLM components is one computer for each of the following server components:

- Agile database
- Agile Application Server

It is acceptable to install multiple server components on the same computer if the additional resources are not available. However, the minimum hardware requirements must be increased based on the number of server components installed on a single computer. For specific hardware and software requirements, see the *Capacity Planning and Deployment Guide*.

Network service and TCP/IP protocol must be enabled before you install Agile PLM.

On Windows, if you receive the error message "Failed to retrieve domain name from registry. Please enter the domain name in the TCP/IP properties and try again later" and the installation aborts, then you must setup Network service, as follows:

1. From the Control Panel window, double-click the Network and Dial-up icon.
2. right-click on the Local Area Connection icon and choose Enable from the shortcut menu.

Obtaining Software from Oracle E-delivery

Oracle products are distributed as "E-Packs". An E-Pack is an electronic version of the software. Refer to the Media Pack description or the list of products that you purchased on your Oracle Ordering Document. Then, view the Quick Install Guide License List to help you decide which Product Pack you need to select in order to search for the appropriate E-Pack(s) to download. Prior to downloading, verify that the product you are looking for is in the License and Options section of the E-Pack README. Oracle recommends that you print the README for reference.

Please download each Product Pack from the Oracle E-Delivery web site (<http://edelivery.oracle.com/>) as specified below.

1. Oracle Agile PLM Application Components
2. Oracle Application Server
3. Oracle Database

There will be an itemized part list within each of the packs and you will need to download all items in order to have the complete download for the desired Oracle Agile release.

All Oracle E-Delivery files have been archived using Info-ZIP's highly portable Zip utility. After downloading one or more of the archives, you will need the UnZip utility or the WinZip utility to extract the files. You must unzip the archive on the platform for which it was intended. Verify that the file size of your downloaded file matches the file size displayed on E-Delivery. Unzip each Zip file to its own temporary directory.

Copying the Agile PLM Files

Before installing Agile PLM, the contents of the media packs should be copied to a local directory with the same file structure as the original CDs. The Platforms directory must be copied to the same directory level as the setup file.

The Solaris files are in ISO9660 format if you are copying the files to a CD. When mounting the CDs on Solaris, you must specify the -F hsfs option to recognize the format. Otherwise, Solaris will attempt to use the ufs format and fail to mount.

Note	Be sure to check the size of the media packs after copying the files to verify that all files have been copied.
------	---

Starting the Agile PLM Installer

Important Install and test this release on a designated development server before installing it on your production environment. Your development environment should mirror your production environment as closely as possible to provide accurate testing results. It is important to validate the installation of this release and confirm your integrations are working correctly as part of your minimum due diligence. Any problems or questions noted during your development system testing should be resolved before installing this release on your production environment.

The Agile PLM installer is a Java program. The installation of all components follows the same initial process up through the panel where you select the components to install.

Before running the installer, make sure

- On UNIX: You are not logged in as the root user.
- You have read and completed the pre-installation checklist. You should also read and follow the installation checklist for each Agile PLM component you plan to install. See “Installation Checklists.”
- You have enough available disk space.
Windows: at least 500MB of available disk space
UNIX: at least 1700MB of available disk space on the drive where your default Temp directory is located.
- You have disabled virus protection.
If virus protection is enabled, components used in the installer can be falsely identified as being infected and lock up the installation. You can turn the virus protection on after the installation is complete.

Important If you are installing Agile PLM on a non-English operating system, you are prompted to select a language on the first installer screen. Choosing the appropriate language for your operating system displays translated installer screens.

To start the Agile PLM installer on Windows:

Log in to the computer using a login with local Administrator permissions.

1. In the Disk1\Windows directory, double-click the setup.exe file.

Note	If there is insufficient disk space available to complete the installation, you will be prompted for another location. Click Choose, select another drive, Click OK, and the installer will start.
------	--

After a few moments, the Welcome screen appears.

2. For information about any screen in the installer, click Help.

To start the Agile PLM installer on UNIX:

1. Log into the system.

Note	If you are installing the Agile Application Server, make sure you log in as the same user that installed Oracle Application Server.
------	---

2. Open a terminal window.
3. Go to the directory where you copied the Agile PLM CDs. Locate the setup.bin file, and run the program by typing the following:

`./setup.bin`

After a few moments, the Welcome screen appears.

4. For information about any screen in the installer, click Help.

Installer Online Help

Each installation panel has online help. At any time during installation, you can click Help for more information about the panel's options.

Note	If you leave the online help window open, it will be updated when you proceed through the installer panels. Otherwise, click Close at the bottom of the help window.
------	--

Installer Buttons

Agile PLM installation panels have the following buttons:

- Cancel — Exits from the installation program.
- Help — Displays online help.
- Previous — Returns to the previous step.
- Next — Proceeds to the next step.
- Install — Starts installing. The Install button appears only on the Pre-Installation Summary panel, after you have specified installation options.
- Done — Exits from the installation program. On Windows, after installing certain components you can choose whether to restart the computer when you click Done. The Done button appears only on the Install Complete panel, after you have finished installing.

Agile PLM Components

During Agile PLM installation, you must select components to install. The list of components you can install is based on your license key. Choose from the following components.

Component	Platform	Installation/Configuration Documentation
Database Server > Agile PLM	Windows	<i>Agile PLM Database Installation Guide</i>
Database Server > Product Interchange	Windows	<i>Agile PLM Database Installation Guide</i>
Application Server	Windows/Solaris/Linux/AIX	Chapter 4, "Configuring the Agile Application Server" and Chapter 5, "Configuring Application Server Clusters"
File Manager	Windows/Solaris/Linux/AIX	Chapter 6, "Configuring the File Manager"
Web Proxies	Windows/Solaris/Linux/AIX	Chapter 7, "Configuring a Web Proxy Server for Agile PLM"
Product InterChange	Windows	Chapter 11, "Configuring Agile Product Interchange"
ChangeCAST Client (Upgrade only)	Windows	See online help for the Agile PLM installer.
Portlet Services	Windows/Solaris/Linux/AIX	See the separate <i>Agile Portlet Services Installation and Configuration Guide</i> .
API	Windows/Solaris/Linux/AIX	See online help for the Agile PLM installer.

Note	If any of these components do not appear, your license key was not authorized for the component.
------	--

Agile PLM Installation Folders

After you install Agile PLM, the following folders appear in the agile_home folder.

Note	This list includes the folders for all Agile PLM components, although it is not recommended that you install them all on one computer.
------	--

Folder	Description
agileDomain	Agile Application Server
AgilePI	Agile Product Interchange
AgileProxies	Web proxy configuration files
changecast	ChangeCAST client
install	Installation and configuration scripts

Folder	Description
integration	Agile Integration Framework (AIF) products such as Agile Integration Services (AIS) and Agile SDK
jdk	Java Development Kit 1.4.2_13
Portlet_51	Agile Portlet Services for WebSphere Portal 5.1.0.2
Tomcat	Tomcat 5.0.30
Uninstaller	Agile PLM uninstaller

Agile PLM Windows Services

After you install Agile PLM on Oracle Application Server for Windows, the following Windows services are added to your system:

Service	Description
Agile ChangeCAST	Agile ChangeCAST service
Apache Tomcat	Apache Tomcat service. Start this service to also start Agile File Manager.
Oracle<instance_name>ASControl	Oracle Application Server Control Console service
Oracle<instance_name>ProcessManager	Oracle Process Manager service. Start this service to start all Oracle Application Server managed processes, including the Agile Application Server.

Agile PLM LDAP Authentication

Agile PLM supports Lightweight Directory Access Protocol (LDAP) authentication through the Agile Directory Server Integration Module. To integrate Agile PLM with your existing directory server, select Yes, use a directory server for authentication in the Directory Server panel of the Agile PLM installer.

After installation is complete, you must use the Agile Java Client to configure the directory server for Agile PLM. For instructions on how to configure the directory server, see the *Agile PLM Administrator Guide*.

Configuring the Agile Application Server

This chapter includes the following:

▪ Overview.....	19
▪ Copying the Oracle Application Server CD to the UNIX Server	19
▪ Installing Oracle Application Server	20
▪ Stopping Oracle Application Server	21
▪ Installing the Oracle Application Server Patch.....	22
▪ Deploying the Agile Application	22
▪ Verifying Your Agile Application Server	23

Important When you install and configure the Agile Application Server, follow the sequence recommended in the [“Application Server Installation Checklist](#) (on page 2)”.[”](#)

Overview

The Agile Application Server is the center of the Agile system, the base for the PLM platform, where all common services and business logic reside for the entire solution. The installation of the Agile Application Server includes the Agile Content Service.

The Agile Application Server runs on Oracle Application Server 10g or BEA WebLogic Server. All client servers and users connect to the Application Server either directly or indirectly through a Web proxy server.

Note If you are configuring an application server cluster, go to [“Configuring Application Server Clusters](#) (on page 29)”.[”](#) for configuration instructions.

Copying the Oracle Application Server CD to the UNIX Server

To simplify the Oracle Application Server installation, you can copy the data from the installation CD onto the UNIX server. For UNIX, Oracle Application Server 10g Release 2 (10.1.2.0.2) has one CD.

To copy the Oracle Application Server software onto the UNIX server:

1. Log in as the user who will own and administer the Agile PLM deployment (for example, the Unix user “agile”).
2. Create a directory on your hard drive called OracleAS_10g where you will copy the Oracle Application Server disk. Under the parent directory, create a subdirectory called Disk1.

```
$ mkdir /opt/agile/OracleAS_10g/Disk1
```

Note	This step assumes you have created the user agile with the home directory /opt/agile.
------	---

3. Copy the contents of the CD-ROM into the corresponding directory:

```
$ cp -pr /<cdrom_mount_point>/10.1.2disk1/* /opt/agile/OracleAS_10g/Disk1/
```

Continue installing Oracle Application Server.

Installing Oracle Application Server

This section provides basic steps for installing Oracle Application Server 10g Release 2 (10.1.2.0.2) J2EE. Please see the complete Oracle Application Server installation documentation from Oracle before installing the server.

Note	If you obtained Oracle Application Server CDs from Agile, you can install the server from the Agile PLM installation program. When you are prompted, specify the Oracle Application Server installation location. The Agile PLM installation program then installs Oracle Application Server in silent mode.
------	--

For an Oracle Application Server cluster, make sure you install Oracle Application Server into the same directory structure on each server in the cluster. Also, all servers in the cluster must use the same operating system. Otherwise, you will be unable to deploy the Agile application to all servers in the cluster.

To install Oracle Application Server 10g Release 2 (10.1.2.0.2) on Windows:

Log in to the computer as a user who is a member of the Administrators group.

1. Insert Oracle Application Server disk 1 or the Oracle Application Server DVD-ROM.
If your computer supports the auto run feature, the installer launches automatically.
2. If your computer does not support the auto run feature, double-click the setup.exe file. If you are installing from DVD-ROM, the setup.exe file is located in the application_server directory.
This launches Oracle Universal Installer.

To install Oracle Application Server 10g Release 2 (10.1.2.0.2) on UNIX:

1. Log in as the user who will own and administer the Agile deployment (for example, the UNIX user "agile").
2. Copy the Oracle Application Server CD to your hard drive. See " [Copying the Oracle Application Server CD to the UNIX Server](#) (on page 19)".
3. Start the installer:

```
$ <installer_path>/Disk1/runInstaller
```


This launches Oracle Universal Installer.

Choosing Oracle Application Server Components to Install

When you install Oracle Application Server as a standalone server or as a cluster, choose the following components:

- Oracle HTTP Server
- OracleAS 10g Containers for J2EE

Note If you use the Oracle Universal Installer to install Oracle Application Server, the above two components are selected by default and cannot be deselected.

- (Cluster only) OracleAS 10g Farm Repository

For more information, see the complete Oracle Application Server installation documentation from Oracle.

What To Do Next

Stop the Oracle Application Server. See the next section.

Stopping Oracle Application Server

Before installing Agile PLM, stop the Oracle Application Server Control Console and all Oracle Application Server applications.

Note The Oracle Application Server Control Console isn't needed to install, deploy, or manage Agile PLM. To conserve memory on your server, you can keep the Oracle Application Server Control Console stopped and use `opmnctl` commands to manage Oracle Application Server processes instead.

On Windows, you can stop the Oracle Application Server Control service. The name of the service starts with "Oracle," followed by the name of the Oracle Home, followed by the word "ASControl." By default, the Application Server Control service starts automatically when the system starts.

To stop Oracle Application Server on Windows:

Open a Command Prompt window.

1. Stop the Oracle Application Server Control Console:

```
\oracle_home\bin\emctl stop iasconsole
```

2. Stop the Oracle Application Server instance:

```
\oracle_home\opmn\bin\opmnctl stopall
```

To stop Oracle Application Server on UNIX:

1. Open a terminal window and log on as the user who installed Oracle Application Server.
2. Stop the Oracle Application Server Control Console:

```
/oracle_home/bin/emctl stop iasconsole
```

3. Stop the Oracle Application Server instance:

```
/oracle_home/opmn/bin/opmnctl stopall
```

Installing the Oracle Application Server Patch

If you have not already applied patch 3992805 to the Oracle Application Server, a dialog displays during the Agile PLM Application Server installation prompting you to do so.

To install the Oracle patch:

1. Stop all Oracle processes, if not already stopped, as described in “Stopping Oracle Application Server.”
2. On a command line, change to the directory where you copied the Agile PLM installation files.
3. Set your ORACLE_HOME environment variable to the location of your Oracle Application Server home.
4. Run the following command:

```
opatch apply  
<Agile_Installation_Directory>\patches\oas101202\3992805
```

Make sure the <Agile_Installation_Directory> does not contain spaces, like “My Documents”.

Note	For more information on the opatch command, see the Opatch Users Guide located at <Agile_Installation_Directory>\patches\oas101202\OPatch\docs\Users_Guide.txt.
------	--

What To Do Next

Install the Agile Application Server. See “Installing Agile PLM.”

Deploying the Agile Application

Install the Agile Application Server by starting the Agile PLM installer and following the instructions in online help. See “Installing Agile PLM.”

After you install the Agile Application Server, you are ready to deploy the application.

Note	For UNIX operating systems, substitute forward slashes for back slashes in the steps below.
------	---

To deploy the Agile application:

1. Windows: Open a Command Prompt window.
UNIX: Open a terminal window and log on as the user who installed Oracle Application Server.
2. Restart the Oracle Application Server instance:

```
\oracle_home\opmn\bin\opmnctl stopall  
\oracle_home\opmn\bin\opmnctl startall
```
3. Check the status of the Oracle Application Server instance:


```
\oracle_home\opmn\bin\opmnctl status
```

4. Deploy the Agile application:

Windows: \agile_home\agileDomain\bin\DeployAgile.cmd

UNIX: /agile_home/agileDomain/bin/DeployAgile.sh

When deployment is finished, the script prompts that the Agile application has been deployed.

Note If the server fails during deployment, run the following command, then restart the Oracle Application Server instance:

```
\oracle_home\dcml\bin\dcmlctl updateconfig
```

5. Verify that the Agile application is deployed:

```
\oracle_home\dcml\bin\dcmlctl listapplications
```

If Agile is listed, you can log in to the application server.

What To Do Next

Verify your Agile Application Server. See the next section.

Verifying Your Agile Application Server

Once the Agile application is deployed, you should verify that the system works before installing other Agile PLM components. The simplest test is to log into Agile Web Client.

Before using Agile Integration Framework (AIF) products such as Agile Integration Services (AIS) or the Agile SDK, you must ensure that the system is properly configured. This involves checking whether Web services and Agile SDK clients can connect successfully to the Agile Application Server. You must also make sure that HTTP ports are configured correctly on your server.

For more information about using AIS and the Agile SDK to develop custom solutions for Agile PLM, see the separate *Agile Integration Services Developer Guide* and the *Agile SDK Developer Guide*, respectively.

Verifying the Agile Application Server Login

After you deploy the Agile application, test whether you can log in.

To start the Agile Application Server and test logging in:

1. Open a Web browser.
2. Test the login using the following URL:

```
http://<hostname>.<domain>:<port>/<appserver_virtual_path>/PLMServlet
```

For example, the URL might look something like this:

<http://plmserver.yourcompany.com:7777/Agile/PLMServlet>

Note The URL is case-sensitive.

Important It is important that you do NOT provide users with this URL. The port you specified during

the Application Server installation is not standard and should not be used by external or remote Agile Web clients. This URL is a direct connection to the Application Server, and it should be used only for testing and troubleshooting purposes.

A login window appears.

3. If you have not added Agile PLM users, type admin for the user and agile for the password.

Checking Whether Agile Web Services Work

Before trying to compile and run the sample AIS web service clients, or developing custom web service extensions to the Agile PLM system, make sure your server is working properly. First, try accessing the following URLs to see if they correctly return WSDL from the server.

1. <http://agileserver/virtualPath/integration/ws/Importer?wsdl>
2. <http://agileserver/virtualPath/integration/ws/Export?wsdl>
3. <http://agileserver/virtualPath/integration/ws/ResponseService?wsdl>

Note	If you have not added Agile PLM users, type admin for the user and agile for the password in the Login dialog. Otherwise, use the login credentials of any existing Agile user.
------	---

All three URLs should return WSDL. If any do not, follow these instructions:

- If the first two URLs fail to return the WSDL, it may be because your server does not have the right `xmlparserv2.jar` file. This applies only if you are hosting Agile PLM on Oracle Application Server. Contact Agile Support to get an older version of the file `xmlparserv2.jar`. Place the `xmlparserv2.jar` file that you receive from Agile Support in the following location on the Agile Application Server:

`<drive>:\oracle_home\lib`

If the first two URLs fail to return the WSDL but the other URL works fine, then the server does not have the `url-handlers.jar` file available on the bootclasspath. Find the `url-handlers.jar` file that was installed in the Agile installation folder, and copy it to the appropriate `jre/lib/ext` directory for your application server (for example, `/oracle_home/jdk/jre/lib/ext`).

- If the third URL fails for any reason, there is something wrong with your web service installation. You may need to uninstall Agile PLM from the application server and reinstall it.

Checking Whether the Agile SDK Works

If you purchased a license to the Agile SDK, Agile PLM provides both server-side and client-side components that allow you to develop Java programs and web services that extend the functionality of Agile PLM and help you integrate it with other applications. Before beginning to develop Agile SDK programs, make sure your system is working properly. You should be able to establish a connection with the Agile Application Server or the Web proxy server used for the Agile PLM system. You should also be able to create an Agile PLM session and download classes from the server.

Checking Your Connection

To check your connection, access the following servlet URL that is installed with Agile PLM:

`http://<servername>.<domain>:<port>/<appserver_virtualPath>/ServerAPIProperties`

For example, the URL might look something like this:

<http://plm.yourcompany.com/Agile/ServerAPIProperties>

The servlet should return the following information:

- Minimum Agile API version needed to connect to the server
- Current Agile PLM server version
- Current Agile PLM release
- Agile PLM session class
- Agile PLM authenticator class
- Agile PLM application server type
- name/value pairs for environment variables

If the page cannot be found, you are unable to connect to the server. There are several possible causes for the problem:

- You typed the URL incorrectly.
- The server may be down temporarily.
- You may be experiencing problems with your network.

Whatever the cause, you must fix the problem before you can run an Agile SDK client. If you need help, contact your company's Help Desk or your Agile PLM administrator.

Configuring HTTP Ports Correctly

If you can connect to the server, but your Agile SDK program has trouble creating an Agile PLM session on Oracle Application Server (OAS), it could be because the server is incorrectly configured. For more information, see "[Configuring Oracle HTTP Server](#) (on page 26)".

Granting Write Permission to the AgileSDK.cache and sdk.extensions.lib Folders

When you run an Agile SDK client program, it connects to the Agile Application Server and automatically downloads the classes it needs into a local cache folder named AgileSDK.cache. Similarly, when you run a process extension from one of the Agile PLM clients or invoke a web service extension, the server automatically copies any updated libraries into a folder named sdk.extensions.lib before loading them. On Windows, these folders are created automatically in the c:\Documents and Settings\<username> folder and there is never any need to modify them. However, on Unix-based operating systems, the system administrator must create the %tmp%AgileSDK.cache and %tmp%sdk.extensions.lib directories and grant users write access to them.

If you don't have write access to the %tmp%AgileSDK.cache and %tmp%sdk.extensions.lib directories, you won't be able to run Agile SDK client programs, use process extensions from Agile

PLM clients, or use Agile PLM web service extensions. Please see your system administrator and make sure you have proper access to those directories.

Alternatively, an Agile SDK client program can programmatically change the location of the AgileSDK.cache directory at run time. For example, you can use the java.io.tmpdir option of the Java Virtual Machine to specify a temp directory where all users have write access.

Setting the sdk.extensions Property

If your company uses the Agile SDK to develop process extensions or web service extensions, the finished programs are copied to the agile_home\integration\sdk\extensions folder located on the Agile Application Server. From there, the server uses special-purpose class loaders to load the programs when they are invoked.

The agile.properties file located in agile_home\agileDomain\config contains an sdk.extensions property that specifies the location of the extensions folder. If process extensions or web service extensions don't run successfully, it could be because the sdk.extensions property is set incorrectly and does not match the location where the programs have been placed.

Note	Ordinarily, you should never need to edit the agile.properties file. The sdk.extensions property should be set correctly when you install Agile PLM. If you modify the sdk.extensions property, you must restart the server.
------	--

Configuring Oracle HTTP Server

Oracle HTTP Server is a version of the Apache Web Server that is included with your installation of Oracle Application Server. There are several problems that can occur with Agile PLM if you have configured Oracle HTTP Server incorrectly. For example, you may have trouble creating an Agile session from an Agile SDK program. Or you may have trouble importing data from the Microsoft Excel-based client. To fix these problems, you must reconfigure the Oracle HTTP Server.

The main configuration file for Oracle HTTP Server is httpd.conf. It is located in the following directory:

Windows: oracle_home\Apache\Apache\conf

UNIX: oracle_home/Apache/Apache/conf

Open the httpd.conf file to edit it. You can use any text editor.

Make sure the Port and Listen values in httpd.conf are set correctly. The Port and Listen values should always match, even if the Oracle HTTP Server is fronted by a proxy server. Here is what the Port section of the httpd.conf file should look like:

```
# Port: The port to which the standalone server listens.
# Certain firewall
# products must be configured before Apache can listen to a
# specific port.
# Other running httpd servers will also interfere with this
# port. Disable
# all firewall, security, and other services if you
# encounter problems.
# To help diagnose problems use the Windows NT command
# NETSTAT -a
#
Port 7777
```

Listen 7777

Note If port 7777 is already being used, Oracle HTTP Server listens on the next available port number between a range of 7777 and 7877.

Make sure the server status reports section of the httpd.conf file uses the fully qualified domain name for your server. Here is what that section should look like:

```
# Allow server status reports, with the URL of
http://servername/server-status
# Change the ".your_domain.com" to match your domain to
enable.
#
<Location /server-status>
    SetHandler server-status
    Order deny,allow
    Deny from all
    Allow from localhost servername.your_domain.com servername
</Location>
```

Important If you modify the httpd.conf file, you must restart Oracle Application Server.

Setting the Temp Directory

When you installed Oracle Application Server, you logged into your operating system as a particular user. You should always log in as that user to manage your installation. Several environment variables are set when you install Oracle Application Server. One of them is the TMP environment variable, which sets the temp directory that the server uses. By default, the TMP environment variable for Oracle Application Server is set to the temp directory of the user that installed the software.

Several Agile PLM services use the temp directory to store temporary files. If you inadvertently delete the temp directory that Oracle Application Server is using, Agile PLM services that were using the temp directory will no longer operate successfully.

If you notice that Agile PLM export and import operations are no longer working, check the application server log and see if there is an error like this:

```
Exception msg:java.rmi.RemoteException: An error was
encountered while exporting data:
com.agile.util.exception.CMAppException: C:\Documents and
Settings\<user>\Local
Settings\Temp\2\AgilePC9Extract\223673754\223673754.xml (The
system cannot find the path specified)
```

The message confirms that Oracle Application Server can no longer find the temp directory. To resolve the problem, you can recreate or restore the temp directory, or set the TMP environment variable for Oracle Application Server to another location.

To reset the temp directory for Oracle Application Server:

1. Stop Oracle Application Server.
2. Open the opmn.xml file located in the \oracle_home\opmn\conf directory.
3. Look for the following section:

```
<ias-instance id="instance_name.server_name.domain">
    <environment>
```

```
<variable id="TMP" value=temp_directory />
</environment>
```

4. Change the *temp_directory* value to a valid directory. It must be a directory that the user who manages OAS can access.
5. Save the file.
6. Restart Oracle Application Server.

Recompiling Agile PLM JSP Files

If you have edited Agile PLM JSP files to modify the Agile Web Client user interface, you need to modify the Oracle Application Server *main_mode* parameter to make sure the JSP files are recompiled before they are loaded.

For information about how to modify the Agile Web Client user interface, please see your Agile Solutions Delivery representative.

To change the *main_mode* parameter to recompile:

1. Windows: Change to the `\oracle_home\j2ee\home\config\` directory.
UNIX: Change to the `/oracle_home/j2ee/home/config/` directory.
2. Edit the `global-web-application.xml` file. Change the value of the *main_mode* parameter to recompile, as follows:

```
<init-param>
    <param-name>main_mode</param-name>
    <param-value>recompile</param-value>
</init-param>
```

Configuring Application Server Clusters

This chapter includes the following:

▪ About Agile Application Server Clusters	29
▪ Configuring the Repository Host Server	31
▪ Installing Agile PLM on the Repository Host Server	31
▪ Configuring Non-Repository Host Servers.....	32
▪ Deploying the Agile Application	33
▪ Starting the Agile Cluster	34
▪ Configuring the Load Balancer	34
▪ Configuring jndiurl.properties and pcclient.jnlp	35
▪ Testing the Agile Cluster.....	36

Important When you install and configure an Agile Application Server cluster, follow the sequence recommended in [“Clustered Application Server Installation Checklist”](#) (on page 2)."

About Agile Application Server Clusters

Agile takes advantage of clustering capability provided by the supported application servers. Oracle Application Server clustering requires a minimum of two servers to set up a clustered environment. A cluster is a group of servers that work together to provide a more scalable, more reliable application platform than a single server. A cluster appears to its clients as a single server, but is actually a group of servers acting as one. A cluster provides two key advantages over a single server:

- **Scalability:** The capacity of a cluster is not limited to a single server or a single machine. New servers can be added to the cluster dynamically to increase capacity. If more hardware is needed, a new server on a new machine can be added.
- **High-Availability:** A cluster uses the redundancy of multiple servers to insulate clients from failures. The same service can be provided on multiple servers in the cluster. If one server fails, another can take over. The ability to fail over from a failed server to a functioning server increases the availability of the application to clients.

Traffic to multiple application servers needs to be managed or balanced by some device in-between the server cluster and the clients. With Oracle Application Server, clients access the cluster through a load balancer.

Before continuing with a clustered installation of Agile PLM on Oracle Application Server, you should understand the following Oracle Application Server terms:

- **server farm** — A collection of Oracle Application Server clusters and Oracle Application Server instances that are grouped and managed together and share the same metadata repository. The shared repository is also called the repository host. You can create an Oracle Application

Server server farm by adding multiple instances to a common repository. A farm can hold cluster as well as standalone instances.

- cluster — A collection of Oracle Application Server instances with identical configuration and application deployment characteristics. To become members of a DCM-managed cluster, Oracle Application Server instances must be of the same installation type and version, reside on a like operating system, and contain only Oracle HTTP Server, OC4J, OPMN, and JAZN components.
- repository host — Also called a file-based repository. When an Oracle Application Server instance is defined as the repository host for a file-based farm, the repository for that Oracle Application Server instance contains the configuration metadata for all Oracle Application Server instances in the file-based farm. When you deploy the Agile application on the repository host, it propagates to all non-repository hosts in the cluster.
- non-repository host — An Oracle Application Server instance that is not the repository and therefore does not contain the configuration metadata for the server farm.

Each application server in the cluster should share a common file vault for Agile File Manager. You can install File Manager and set up the file vault on a separate server on the same subnet as the cluster. Create a Files folder on that server, and then give it write permission.

Important Make sure all application servers and the load balancer used for Agile PLM are registered in the same domain. You cannot distribute Agile PLM application servers across multiple domains.

Choosing Oracle Application Server Components to Install

Oracle Application Server must be installed before you install any Agile components. For information on how to install Oracle Application Server, see [“Installing Oracle Application Server \(on page 20\)”](#).

When you install Oracle Application Server as a cluster, choose the following components:

- Oracle HTTP Server
- OracleAS 10g Containers for J2EE

Note If you use the Oracle Universal Installer to install Oracle Application Server, the above two components are selected by default and cannot be deselected.

- OracleAS 10g Farm Repository

When installing the Repository Host Server, choose Create a new Oracle Application Server File-based Farm for this instance as the repository type and make note of the Oracle HTTP Server Port, DCM Repository Port and OAS Admin Console URL at the end of the installation. When installing the Non-Repository Host Servers, choose Join an existing Oracle Application Server File-based Farm as the repository type and make note of the Oracle HTTP Server Port and OAS Admin Console URL at the end of the installation.

For more information, see the complete Oracle Application Server installation documentation from Oracle.

Configuring the Repository Host Server

After installing the repository host server, you must configure the application server cluster. You must join the file-based farm, and then create and join the cluster.

Note	For UNIX operating systems, substitute forward slashes for back slashes in the steps below.
-------------	---

To configure the repository host server:

1. Windows: Open a Command Prompt window.
UNIX: Open a terminal window and log on as the user who installed Oracle Application Server.
2. Restart the Oracle Application Server instance:

```
\oracle_home\opmn\bin\opmnctl stopall
```

```
\oracle_home\opmn\bin\opmnctl startall
```

3. If the dcm-daemon process is not alive, start it:

```
\oracle_home\dcm\bin\dcmctl start -admin
```
4. Check the status of the Oracle Application Server instance:

```
\oracle_home\opmn\bin\opmnctl status
```
5. View which farm is associated with the repository server:

```
\oracle_home\dcm\bin\dcmctl whichfarm
```
6. If the output reads Distributed File Based (host), skip this step. If the output reads Standalone Instance, associate the instance with a server farm:

```
\oracle_home\dcm\bin\dcmctl joinfarm -r <repository_id>
```

Note	If you don't know the repository ID, run the following command on the repository server:
-------------	--

```
\oracle_home\dcm\bin\dcmctl getrepositoryid
```

The command should return something like <repository_host_name>:7100.

7. Create the cluster:

```
\oracle_home\dcm\bin\dcmctl createcluster -cl AgileCluster
```
8. Join the cluster:

```
\oracle_home\dcm\bin\dcmctl joincluster -cl AgileCluster
```

After configuring the repository host server, you can install Agile PLM on the repository host server.

Installing Agile PLM on the Repository Host Server

Install the Agile Application Server by starting the Agile PLM installer and following the instructions in online help. See "Installing Agile PLM."

After you install the Agile Application Server, you are ready to deploy the application.

Configuring Non-Repository Host Servers

After the repository host server is configured, configure the non-repository host servers. You need to join the server farm on the repository host server and then join the cluster.

Note	For UNIX operating systems, substitute forward slashes for back slashes in the steps below.
------	---

To configure a non-repository Host server:

1. Windows: Open a Command Prompt window.
UNIX: Open a terminal window and log on as the user who installed Oracle Application Server.

2. Restart the Oracle Application Server instance:

```
\oracle_home\opmn\bin\opmnctl stopall
```

```
\oracle_home\opmn\bin\opmnctl startall
```

3. Check the status of the Oracle Application Server instance:

```
\oracle_home\opmn\bin\opmnctl status
```

4. If the dcm-daemon process is not alive, start it:

```
\oracle_home\dcml\bin\dcmctl start -admin
```

5. Check the status of the Oracle Application Server instance:

```
\oracle_home\opmn\bin\opmnctl status
```

6. View which farm is associated with the repository server:

```
\oracle_home\dcml\bin\dcmctl whichfarm
```

7. If the output reads Standalone Instance, associate the instance with a server farm:

```
\oracle_home\dcml\bin\dcmctl joinfarm -r <repository_id>
```

Note	If you don't know the repository ID, run the following command on the repository server:
------	--

```
\oracle_home\dcml\bin\dcmctl getrepositoryid
```

Note	If the output for the whichfarm command reads Distributed File Based (host), the Oracle Application Server instance is configured to be a repository host and already belongs to a server farm. Make sure the Oracle Application Server instance is not the repository host for Agile PLM. If it is not, you can remove the instance from the farm by running the dcmctl leavefarm command. Then run the joinfarm command mentioned above.
------	--

8. Join the cluster:

```
\oracle_home\dcml\bin\dcmctl joincluster -cl AgileCluster
```

9. Repeat steps 2 to 8 on all non-repository servers.

10. On each non-repository server, open the oracle_home\opmn\conf\opmn.xml file.

11. Search for rmi port: `<port id="rmi" range="12401-12500"/>`. Change to `<port id="rmi" range="23791-23791"/>`. After changing the port number, save and close the `opmn.xml` file.
12. Open a Command Prompt window and change to the `oracle_home\opmn\bin` directory.
13. Run the `opmnctl reload` command.
14. Restart the Application Server.

After configuring all non-repository host servers in the cluster, you are ready to deploy the Agile application on the repository host server.

Note	You should not install the Agile Application Server on non-repository host servers.
------	---

Deploying the Agile Application

After the Agile PLM application server has been installed on the Repository Host Server, you can now deploy the Agile application. You should deploy Agile on the repository host server. It is automatically propagated to all other servers in the cluster.

Note	For UNIX operating systems, substitute forward slashes for back slashes in the following steps.
Note	Before deploying, make sure that the <code>dcm-daemon</code> component on all servers in the cluster is up.

To deploy the Agile application:

1. Windows: Open a Command Prompt window.
UNIX: Open a terminal window and log on as the user who installed Oracle Application Server.
2. On all of the servers, restart the Oracle Application Server instance:

```

\oracle_home\opmn\bin\opmnctl stopall
\oracle_home\opmn\bin\opmnctl startall

```
3. Check the status of the Oracle Application Server instance:

```

\oracle_home\opmn\bin\opmnctl status

```
4. If the `dcm-daemon` process is not alive, start it:

```

\oracle_home\dcm\bin\dcmctl start -admin

```
5. Run the `opmnctl status` command again to verify that the `dcm-daemon` process is alive.
6. On all of the non-repository servers, check the status of the Oracle Application Server instance. If the `dcm-daemon` process is not alive, start it.
7. On the repository server, run the following command to update the configurations of all the servers in the cluster:

```

\oracle_home\dcm\bin\dcmctl updateconfig

```
8. Deploy the Agile application on the Repository Host Server:
 Windows: `\agile_home\agileDomain\bin\DeployAgile.cmd`

UNIX: /agile_home/agileDomain/bin/DeployAgile.sh

When deployment is finished, the script prompts that the Agile application has been deployed.

Note	If one of the servers fails during deployment, run the following command, then restart the Oracle Application Server instance:
-------------	--

```
\oracle_home\dcml\bin\dcmlctl updateconfig
```

9. Verify that the Agile application is deployed:

```
\oracle_home\dcml\bin\dcmlctl listapplications
```

If Agile is listed, you can log in to the application server.

- On all of the servers, restart the Oracle Application Server instance:

```
\oracle_home\opmn\bin\opmnctl stopall
```

```
\oracle_home\opmn\bin\opmnctl startall
```

What To Do Next

Configure a load balancer or a Web proxy server for your Agile PLM system. On Windows, IIS is not supported as a Web proxy server for an OAS cluster, so a load balancer is recommended. For more information, see “Configuring the Load Balancer” and “Configuring a Web Proxy Server for Agile PLM.”

Starting the Agile Cluster

Once the Agile application is deployed to every Oracle Application Server in the cluster, the cluster should be active. You can use the opmnctl command-line interface to stop and start individual servers in the cluster.

Alternatively, you can restart all servers in the cluster using the following dcmctl command:

On Windows:

```
\oracle_home\dcml\bin\dcmlctl start -cl AgileCluster
```

On UNIX:

```
/oracle_home/dcm/bin/dcmctl start -cl AgileCluster
```

Note	The dcmctl start command is deprecated in Oracle Application Server 10g and is provided for backward compatibility only.
-------------	--

Configuring the Load Balancer

A load balancer is deployed to protect the application server and to balance user load across a cluster. When external users need access to Agile, this device is deployed in the DMZ. The load balancer does not need to be installed in the DMZ if Agile PLM is only accessed internally from within the corporate firewall. Load balancers can be used with the Java Client and the Web Client.

To configure a load balancer:

- Configure three virtual IP addresses, one for the application server (port 7777 by default), one for the File Manager (port 8080 by default), and one for ORMI (port 23791 by default).
- Set the load balancer policy to Round-robin.

To access the system after you have configured the load balancer, use the IP address of the virtual server in the URL used to access Agile. The following URL is an example:

<http://loadbalancer.mydomain.com/Agile/PLMServlet>

or

ormi://loadbalancer.mydomain.com/Agile

What To Do Next

Verify that the Agile cluster is working properly. See “[Testing the Agile Cluster](#) (on page 36)”.

Configuring jndiurl.properties and pcclient.jnlp

Important This section applies only to clustered Agile PLM systems on UNIX that use a Web proxy server (Apache) instead of a load balancer. Otherwise, you can skip these manual configuration steps.

To configure jndiurl.properties and pcclient.jnlp on non-repository host servers:

10. Stop the Web proxy server.
11. Stop Oracle Application Server on each server in the cluster.
12. On each non-repository host server, open the following file in a text editor:
`/oracle_home/j2ee/home/applications/Agile/APP-INF/classes/jndiurl.properties`
13. Edit the URL to point to the non-repository host:
`server2=ormi://<non-repository_hostname>/<appserver_virtual_path>`
14. Save the jndiurl.properties file.
15. On each non-repository host server, open the following file in a text editor:

`/oracle_home/j2ee/home/applications/Agile/JavaClient/pcclient.jnlp`

Find the following tags and edit the values listed below in blue: jnlp:

`<jnlp spec="1.0+" codebase="http://<proxy>.<domain>:<port>/JavaClient">`

`serverURL:`

`<argument>serverURL=ormi://<non-repository_hostname>.<domain>:<port>/`

`<appserver_virtual_path></argument>`

`webserverName:`

`<argument>webserverName=<proxy>.<domain>:<port></argument>`

where

- `<non-repository_hostname>` is the hostname for the non-repository host (not the repository

- host).
 - *<domain>* is the fully qualified domain name.
 - *<port>* is the server port.
 - *<appserver_virtual_path>* is the Agile Application Server virtual path. The default is "Agile".
 - *<proxy>* is the Web proxy server hostname.
16. Save the file.
 17. On each non-repository host server, open the following file in a text editor:
 /oracle_home/j2ee/home/applications/Agile/JavaClient/oas/ext.jnlp
 Find the following tag and edit the values listed below in italics: jnlp:
 <jnlp spec="1.0+" codebase="http://<non-repository_hostname>.<domain>:<port>/JavaClient">
 where
 - *<non-repository_hostname>* is the hostname for the non-repository host (not the repository host).
 - *<domain>* is the fully qualified domain name.
 - *<port>* is the server port.
 18. Save the file.
 19. Restart Oracle Application Server on each server in the cluster.
 20. Retart the Web proxy server.

Testing the Agile Cluster

Use the following URLs to test each server in the cluster and the load balancer:

Web Client

http://hostname.domain.com:<port_no>/<app-serverVirtualPath>/PLMServlet

For example, if your hosts are named host1, host2, and host3, the Web Client URLs could look like this:

<http://host1.mydomain.com:7777/Agile/PLMServlet>

<http://host2.mydomain.com:7777/Agile/PLMServlet>

<http://host3.mydomain.com:7777/Agile/PLMServlet>

Java Client

http://hostname.domain.com:<port_no>/JavaClient/start.html

For example, if your hosts are named host1, host2, and host3, the Java Client URLs could look like this:

<http://host1.mydomain.com:7777/JavaClient/start.html>

<http://host2.mydomain.com:7777/JavaClient/start.html>

<http://host3.mydomain.com:7777/JavaClient/start.html>

Load Balancer

If you use a load balancer for your application server cluster, test the entire system by going to the load balancer URLs for Web Client and Java Client:

<http://loadbalancer.domain.com/Agile/PLMServlet>

<http://loadbalancer.domain.com/JavaClient/start.html>

Troubleshooting

For information about how to check and troubleshoot problems with your Agile PLM installation on Oracle Application Server, see “[Verifying Your Agile Application Server](#) (on page 23)”.

Cannot start a non-repository server with the Java Client

If you cannot start a non-repository server with the Java Client after configuring a cluster, the RMI port may not be updated with the correct port number, 23791, in opmn.xml.

To update the RMI port number:

1. On the non-repository server, open the following file in a text editor:
oracle_home/opmn/conf/opmn.xml
2. Search for the following line in the opmn.xml file:
<port id="rmi" range="12401-12500"/>
3. Change the line to the following text:
<port id="rmi" range="23791-23791"/>
4. Save and close the opmn.xml file.
5. Windows: Open a Command Prompt window.
UNIX: Open a terminal window and log on as the user who installed Oracle Application Server.
6. On all of the servers, reload the Oracle Application Server instance:
%oracle_home%\opmn\bin\opmnctl reload
7. Restart the Oracle Application Server instance:
%oracle_home%\opmn\bin\opmnctl stopall
%oracle_home%\opmn\bin\opmnctl startall

Configuring the JNLP MIME Type on UNIX

A JNLP file is an XML document that describes a Java application to be launched by Java Web Start. To successfully download and install applications using Java Web Start, you must configure the JNLP MIME type for your server.

Add the following line to the mime.types file in the /oracle_home/Apache/Apache/conf directory of each application server in the cluster:

```
application/x-java-jnlp-file      JNLP
```

Fixing Agile PLM Client Synchronization Problems and JMS Configuration

If you are running your Oracle Application Server cluster, you may notice synchronization problems with Agile PLM clients. On non-Repository Host servers, the JMS host may be set to the name of the computer instead of the fully qualified domain name of the Repository Host server. Consequently, the Agile PLM metadata is not synchronized on all servers in the cluster. To fix this problem, you need to update the JMS configuration file (jms.xml) on each non-Repository Host server.

To fix JMS configuration:

1. On the Repository Host server, open a terminal window and log on as the user who installed Oracle Application Server.
2. In the /oracle_home/j2ee/home/config directory, open the jms.xml file in a text editor.
3. Search for "host=". For all instances that you find, make sure the hostname is the fully qualified domain name of the Repository Host server.
4. Save the jms.xml file.
5. Copy the jms.xml file to the /oracle_home/j2ee/home/config directory of each non-Repository Host server in the cluster.
6. Restart each Oracle Application Server instance. Make sure you start the OAS instance on the Repository Host server first.

```
/oracle_home/opmn/bin/opmnctl stopall
```

```
/oracle_home/opmn/bin/opmnctl startall
```


Configuring the File Manager

This chapter includes the following:

▪ About File Management.....	39
▪ Configuring the File Manager	43
▪ Starting the File Manager	46
▪ Validating the File Manager Installation.....	47

About File Management

The File Manager manages files in a repository in the file system. A file management server configuration provides a place to store and retrieve files locally or remotely. The File Management Server can be installed on the same machine as the Agile Application Server or on a separate machine. The server can also be installed in a cluster or distributed across geographic regions.

The Agile Viewer communicates with the File Manager which in turn makes remote calls to the Agile Application server using the HTTP protocol. Because of this communication, each File Manager should have an associated Viewer on the same machine or separate machines.

In the preferred clustered environment, file management servers run on each application server node managing a shared drive. In a distributed environment, files are stored locally for efficient downloads and uploads. If a file is not found on a local file management server, the file is replicated from the primary file manager. The primary file manager is the file manager that is local to the application server.

Distributed File Managers

Multiple Agile File Managers can be deployed in a distributed configuration with a proxy server (Microsoft IIS or Apache HTTP Server) in the DMZ. A Distributed File Manager configuration allows you to create additional file managers at remote locations so that remote sites can store and retrieve files locally, while still making the files available to the Agile PLM system. This reduces the download time by placing file managers close to remote clients. The additional file managers can also support unique configuration settings, such as fully qualified names or IP addresses.

The determination for using distributed file management is based on your Agile server and network configuration. In general, the following criteria can help you to determine if you need additional file managers:

- Multiple remote locations
If you have multiple remote sites connected over a WAN, clients at remote locations who need to store and retrieve files from the main file manager can experience large time delays.
- Reducing inter-network traffic
If your network is divided into subnets to reduce network traffic, then you should consider

putting a file manager in each subnet that contains Agile users to reduce your intersubnet network traffic.

The usage model for a distributed file manager configuration is as follows:

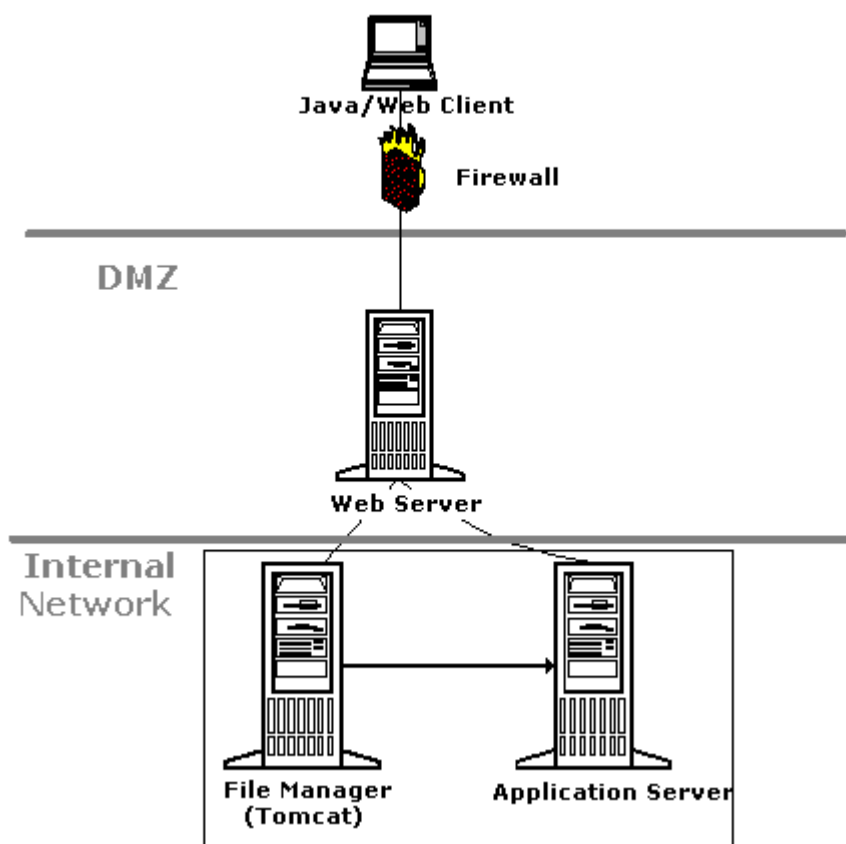
- Local users store files on a local file manager, which should be designated the primary file manager.
- Creating a file attachment goes to the primary file manager.
- File replication is on-demand. When a remote user requests a file residing on a non-preferred file manager, the system copies the file to the remote user's preferred file manager.
- Accessing any non-preferred file manager prompts the user for a login name and password.
- Copying a file creates the copy on the same computer. It does not replicate the file to a remote user's preferred file manager.
- Checking out and checking in files is the same as adding and getting files.
- Viewing a file or viewing a redline file is the same as getting a file.
- Redlining a file only redlines the file on the primary file manager.
- Redlining a file is the same as adding a file.
- Deleting a file only removes the file from the primary file manager. Use the vault utility to clean up additional files on non-primary file managers.

Deployment Configurations

You can deploy the File Manager in either a standalone or cluster configuration.

Standalone

The following figure shows a single server standalone deployment configuration. The web server in the DMZ forwards calls to the Application Server as well as the File Manager.

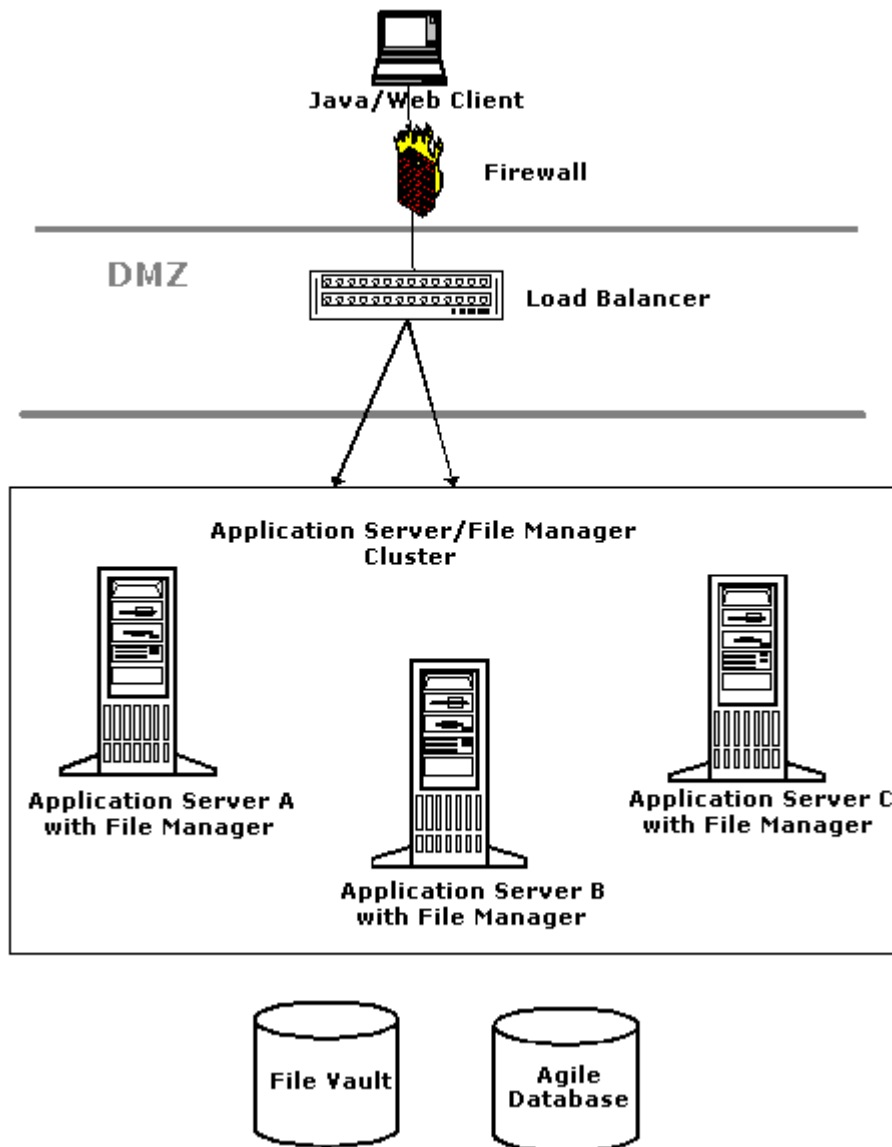


If you plan to install the Application Server and File Manager on the same box (co-deploy), choose both components during installation.

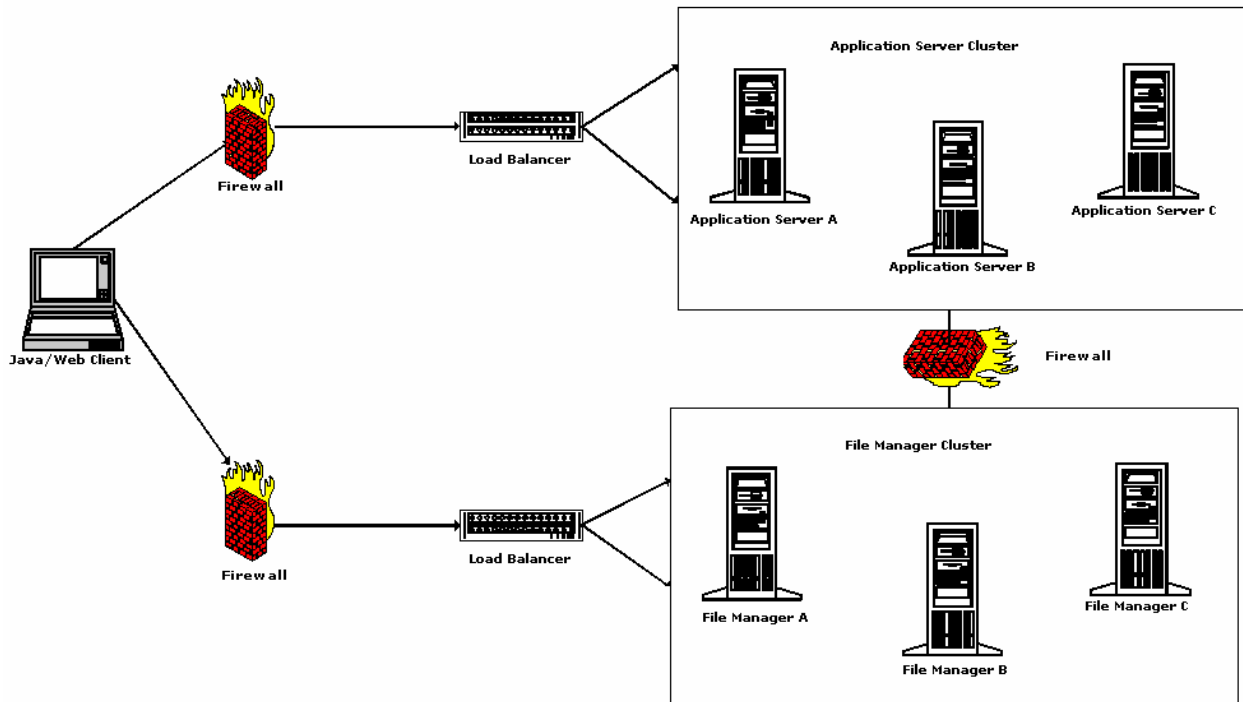
Cluster

The preferred cluster deployment configuration is shown in the following figure. Each node in the cluster has the Application and File Manager deployed. File Managers have a shared disk for managing files. Each File Manager communicates with the local application server for optimized performance. The File Managers join in a Tomcat cluster to support failovers. The Load Balancer exposes two virtual IP addresses, one for the application server and one for the File Manager.

When installing this type of cluster, choose both the Application Server and File Manager components during installation before selecting the Cluster configuration.



You can also choose to manage a separate File Manager cluster and Application Server cluster, but that configuration requires more hardware. If you choose to install this type of setup, the clusters should be installed separately before configuring and validating.



Configuring the File Manager

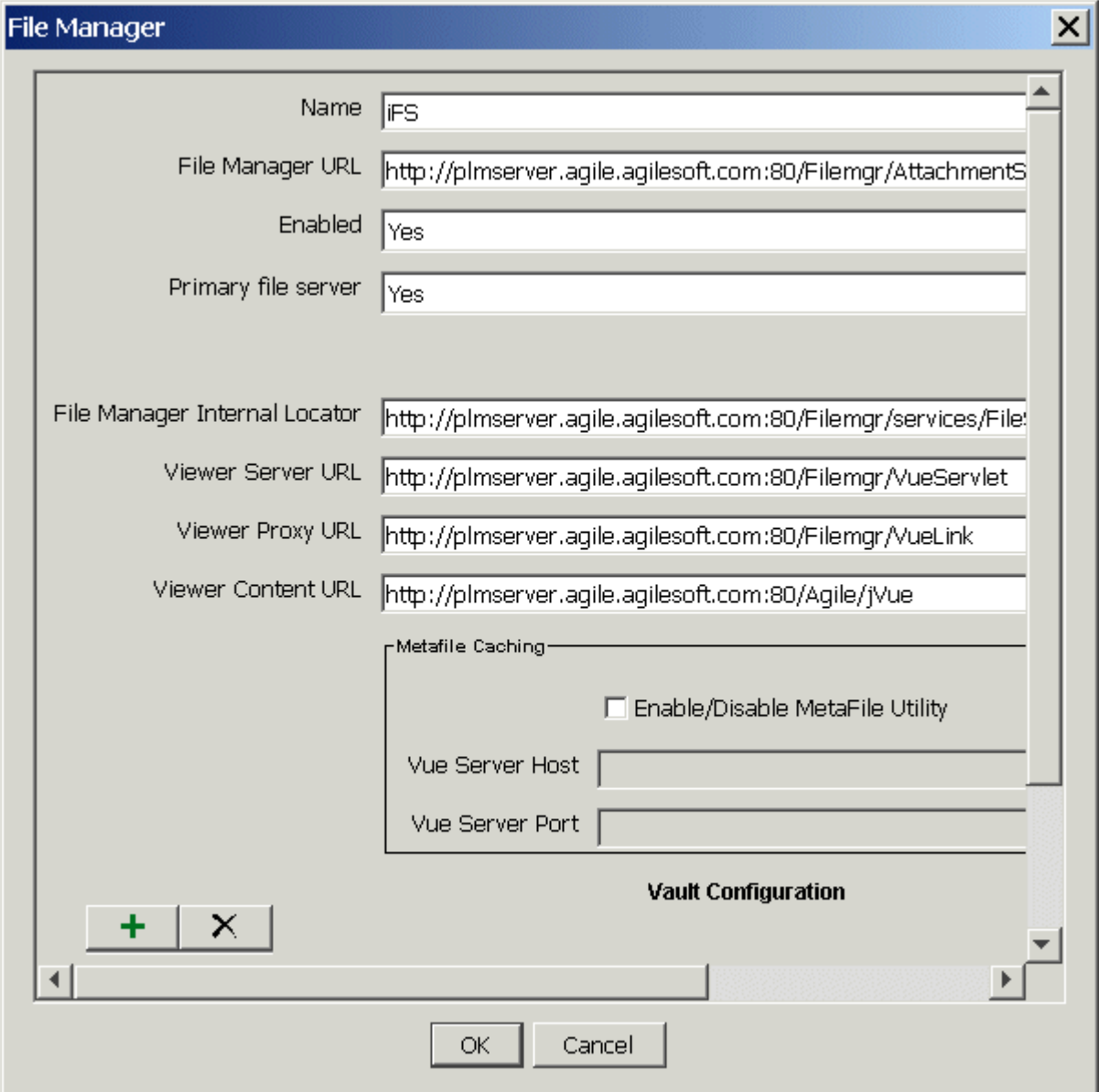
After installing the File Manager and setting up a proxy server for it, you must configure the File Manager settings in the Java Client.

Note Before configuring the File Manager, make sure you set up a proxy server.

To configure File Manager settings:

1. Start the Agile Application Server, if you did not install it as a service.
 - a. Windows: Choose Start > All Programs > Agile > Agile 9.2.2.1 > Start Agile Server.
 UNIX: Run the StartAgile.sh script located in the /opt/Agile/Agile9221/agileDomain/bin directory
 - b. A Command Prompt window appears. This window must remain open, but can be minimized. Wait until the message, "Agile PLM Server Starting Up", appears in the window.
2. Start the Agile Java Client, as described in "[Installing and Configuring Agile Java Client](#) (on page 85)".
3. Log in as an Agile Administrator user.
4. Click the Admin tab.
5. Choose Server Settings > Locations. The Server Location window appears.

6. Click the File Manager tab to bring it forward.
7. double-click the entry to display the File Manager dialog box.
8. Click the Advanced button.



The image shows a 'File Manager' dialog box with a blue title bar and a close button (X) in the top right corner. The dialog contains several input fields and a 'Vault Configuration' section. The fields are: 'Name' (iFS), 'File Manager URL' (http://plmserver.agile.agilesoft.com:80/Filemgr/AttachmentS), 'Enabled' (Yes), 'Primary file server' (Yes), 'File Manager Internal Locator' (http://plmserver.agile.agilesoft.com:80/Filemgr/services/File:), 'Viewer Server URL' (http://plmserver.agile.agilesoft.com:80/Filemgr/VueServlet), 'Viewer Proxy URL' (http://plmserver.agile.agilesoft.com:80/Filemgr/VueLink), and 'Viewer Content URL' (http://plmserver.agile.agilesoft.com:80/Agile/jVue). Below these fields is a 'Metafile Caching' section with a checkbox 'Enable/Disable MetaFile Utility' (unchecked), and two more fields: 'Vue Server Host' and 'Vue Server Port'. At the bottom, there is a 'Vault Configuration' label, a scroll bar, and 'OK' and 'Cancel' buttons.

Name	iFS
File Manager URL	http://plmserver.agile.agilesoft.com:80/Filemgr/AttachmentS
Enabled	Yes
Primary file server	Yes
File Manager Internal Locator	http://plmserver.agile.agilesoft.com:80/Filemgr/services/File:
Viewer Server URL	http://plmserver.agile.agilesoft.com:80/Filemgr/VueServlet
Viewer Proxy URL	http://plmserver.agile.agilesoft.com:80/Filemgr/VueLink
Viewer Content URL	http://plmserver.agile.agilesoft.com:80/Agile/jVue

Metafile Caching

☐ Enable/Disable MetaFile Utility

Vue Server Host

Vue Server Port

Vault Configuration

OK Cancel

9. Enter the values of the File Manager URL and the File Manager Internal Locator.
The File Manager URL is the URL the Agile Web Client connects to. The format is:
http://<proxy/loadbalancer>:<port>/<fileserver_virtual_path>/AttachmentServlet
The File Manager Internal Locator is the URL the file management server uses. The format is:

`http://<proxy/loadbalancer>:<port>/<fileserver_virtual_path>/services/FileServer`

Note If you have co-deployed the Application Server and the File Manager, use the Application Server URL, not the proxy server.

10. Enter the values of the Viewer Server URL, Viewer Proxy URL, and the Viewer Content URL, if needed:

The Viewer Server URL is the URL the Web Client uses to connect to the Viewer. The format is:

`http://<proxy/loadbalancer>:<port>/<fileserver_virtual_path>/VueServlet`

The Viewer Proxy URL is the URL the Viewer uses to communicate with the File Manager. The format is:

`http://<proxy/loadbalancer>:<port>/<fileserver_virtual_path>/VueLink`

The Viewer Content URL is the location from where the Viewer Applet is downloaded. The format is:

`http://<proxy/loadbalancer>:<port>/<appserver_virtual_path>/jVue`

11. Click the Standard Vault Type to display the drop-down list.

You can choose to have Standard or Custom vault. A standard vault is the default vault type that contains the new files and redlines, while a custom vault allows you to attach a disk of data to Agile PLM as-is without reorganizing the files. A custom vault is always set up as read-only.

You can attach an arbitrary file structure to the File Manager without the files being uploaded. Refer to the *Agile PLM Import and Export Guide* for more information on how to configure FileLoad for custom vaults.

12. Enter a description of the vault in the Description field.
13. Verify that the primary location where the files are stored in the Base Storage Directory field is the same location you entered during installation. The default location is \files. The location can be a shared network storage directory, such as a Storage Area Network (SAN).

Important Do not specify a mapped location. Instead, specify the actual machine name and directory, like this:

[\\fileserver\files](#)

14. Enter a location where the purged (deleted) files are automatically moved in the Purge Directory field. The default location is agile_home\files\purge. The location can be a shared network storage directory, such as a Storage Area Network (SAN).


Important Do not specify a mapped location. Instead, specify the actual machine name and directory, like this:

[\\fileserver\files\purge](#)

15. Select if the vault is Read-Write or Read-Only from the Category drop-down list. Each File Manager can have only one read-write vault.

If you have upgraded and have multiple vaults, then the additional vaults should be cascaded as read-only vaults.



16. Click the plus-sign  to add additional vaults.
17. Click OK when done.

18. Start the File Manager (Tomcat). For instructions, see the next section, “Starting the File Manager.”

There are additional configuration settings used to fully configure File Manager through the Java Client. These settings are:

- Filename Prefix (Preferences)
- Checksum computation (Preferences)
- DFM Optimized Replications (Preferences)

For more information on these additional settings, see the *Agile PLM Administrator Guide*.

Reconfiguring File Manager After Setting Up a Web Proxy Server

If you set up a Web proxy server for Agile File Manager that is different from the server or port you specified when you installed Agile PLM, you must make sure that File Manager points to the proxy server on the correct port. Otherwise, File Manager may not start successfully and Agile PLM clients won't be able to access file attachments.

For instructions on setting up a Web proxy server for File Manager, see “Configuring a Web Proxy Server for Agile PLM.”

To configure File Manager after setting up a Web proxy server:

1. Configure File Manager locations in Java Client. See “[Configuring the File Manager](#) (on page 39)”.
2. Stop the File Manager.
3. Using a text editor, open the server.conf file for File Manager. The server.conf file is located in the following folder:

```
\agile_home\Tomcat\webapps\<fileserver_virtual_path>\
WEB-INF\classes\com\agile\webfs\configuration
```

4. Find the file.server.url entry, and update it to point to the proxy server and port number. After you modify the file.server.url entry, it should look something like this:

```
file.server.url =http://webserver.company.com:80/Filemgr/services/FileServer
```

5. Save the server.conf file.
6. Modify the file.server.url entry in the server.conf file located at
 \agile_home\Tomcat\server\lib\agile-sso.jar (\com\agile\webfs\configuration).
7. Save the server.conf file.
8. Restart the File Manager.

Starting the File Manager

After you have configured the File Manager, you can start the server.

To start the File Manager on Windows:

1. Choose Start > Administrative Tools > Services.

2. Start the Apache Tomcat service.

You can check for errors in the stdout and stderr logs in the *agile_home*\Tomcat\logs directory.

To start the File Manager on UNIX:

1. Open a terminal window.
2. Change to the /opt/agile_home/Tomcat/bin directory.
3. Set and export the JAVA_HOME variable on the command line:
 > JAVA_HOME=/opt/agile_home/jdk
 > export JAVA_HOME
4. Start the File Manager:
 > ./catalina.sh run

Validating the File Manager Installation

To verify that the File Manager installed successfully, check the following URL:

```
http://<fileserver_host>:<port>/<fileserver_virtual_path>/C  
onfiguration
```

For example, you might type the following URL:

<http://filevault.mycompany.com:8080/Filemgr/Configuration>

If you are using a Web proxy server for File Manager, the URL might look like this:

<http://filevault.mycompany.com:80/Filemgr/Configuration>

After a moment, the File Manager Configuration page should display. This page tests the File Manager and Application Server connections. If Success is listed in the Status column for all connections, your installation was successful.

File Manager Configuration

Version : Agile 9.2.2.1

Setting	Value	Status
File Manager Connection	http://Config151Vm1.qa.agilesoft.com:8080/Filemgr/AttachmentServlet	Success
File Manager Connection	http://Config151Vm1.qa.agilesoft.com:8080/Filemgr/services/FileServer	Success
Application Server Connection	http://Config151Vm1.qa.agilesoft.com:80/Agile/PLMServlet	Success
Application Server Connection	http://Config151Vm1.qa.agilesoft.com:80/Agile/services/FSHelper	Success
Vue Server Connection	http://Config151Vm1.qa.agilesoft.com:8080/Filemgr/VueServlet	Success
Vue Server Connection	http://Config151Vm1.qa.agilesoft.com:8080/Filemgr/VueLink	Success
Vue Server Connection	http://Config151Vm1.qa.agilesoft.com:80/Agile/services/DmsService	Success

Configuring a Web Proxy Server for Agile PLM

This chapter includes the following:

▪ Overview.....	49
▪ Configuring IIS as a Proxy Server for Agile PLM.....	52
▪ Configuring IIS as a Proxy Server for Agile File Manager	53
▪ Configuring Apache Web Server as a Proxy Server for Agile PLM and Agile File Manager	55
▪ Logging In to the Agile Web Client	61
▪ Troubleshooting the Agile Web Client	61

Important When you configure a Web proxy server for Agile PLM, follow the sequence recommended in [“Web Proxy Server Installation Checklist](#) (on page 4)”.[”](#)

Overview

The Agile Web client is a fully functional Web interface that allows Agile-enabled manufacturers to securely provide internal users and trusted supply chain partners access to Agile PLM.

To connect to the Agile Web Client on a Web proxy server, Agile Web proxy files must be installed on the Web server. Agile Web Client uses Microsoft Internet Information Services (IIS) or Apache Web Server. The Agile Web client connects to an Agile Application Server in the same manner as all other Agile Application Server clients. Secure access is maintained using SSL encryption with HTTPS and is recommended for the Internet. Standard firewall configurations are supported by the Web server.

Note	If you are using an Oracle Application Server cluster on Windows, you must use a load balancer instead of a Web proxy server to protect the application server and to balance user load across the cluster.
-------------	---

Agile Internet Security

A Web browser uses the Agile Web client to communicate with the Agile Application Server over the Internet using the HTTPS protocol, which uses the Secure Sockets Layer (SSL) protocol. SSL is a standard Internet connection-based protocol for secure communications.

Recommended Security Practices

It is important that you change all default passwords for both Agile PLM and the database. In addition, users should change their passwords at least every 30 days.

Configuring Internet Information Server

Before you install Agile Web proxy files on Windows, a Microsoft Internet Information Server (IIS) must be installed on the same computer. In addition, IIS must be configured as follows:

1. Choose Start > Administrative Tools > Internet Information Services (IIS) Manager, and create a new web site called Agile PLM Web Site. For more information on how to create a web site, see the Internet Information Server documentation online at the Microsoft TechNet:
<http://technet.microsoft.com/>

Note	Due to security vulnerabilities, we recommend that you don't use the Default Web Site installed with Internet Information Server. You can either delete or disable the Default Web Site.
------	--

2. right-click the Agile PLM Web Site, and choose Properties from the shortcut menu.
3. Select the Directory Security tab and click Edit for Anonymous Access and Authentication Control.
4. Make sure Enable Anonymous Access is checked.
5. Uncheck Integrated Windows authentication.
6. Click OK.

Also, search the [\\winnt\system32 folder for the wininet.dll](#) file. The file must be at least version 5.00.2919.6305 or later. Install at least Internet Explorer version 5.00.2919.6305 to update the DLL file.

For security reasons, Agile recommends installing Agile Web proxy files on a server separate from other Agile PLM servers.

Firewall Configuration

A user typically runs the Agile Web client in a browser from behind a corporate firewall. This communicates over the Internet to the Agile servers behind another corporate firewall.

If you want to use HTTPS, each Agile Web client's firewall must be configured to allow outgoing HTTPS connections from the user's browser to the Internet.

The corporate firewall on the Agile application side must be configured to allow:

- Incoming HTTPS connections from the Internet to the Web server
- Outgoing TCP/IP connections from the Web server to the Application Server

Important On Windows, encryption is supported only between IIS and the client's browser, not between IIS and the Application Server. Do not put a certificate on the Application Server.

Deployment Scenarios in the DMZ

This section contains deployment scenarios. For deployment diagrams, see the *Capacity Planning and Deployment Guide*.

Single Firewall

In the first scenario, there is only one firewall between the DMZ and internet.

In this setup, the computers in the intranet are referenced by a single IP address. There is no network address translation (NAT) between the DMZ and intranet. Only the Web server in the DMZ is referenced by two IPs or hostnames. Agile Web clients are deployed in this environment as follows:

- The Web server resides on one computer in the DMZ with the Agile Application Server, Agile Viewer, and the database residing in the Safe Zone.

When the Application Server and Agile Web proxy files are installed, you must open application server-specific HTTP/HTTPS ports from the DMZ to the intranet. This enables communication between the IIS Web server proxies and the Agile Application Server. The application server-specific ports must be dedicated and bidirectional between the Web server in DMZ and application server in the intranet.

You are not required to open any other ports from the DMZ to the intranet.

Advantages:

- Firewall friendly and secure without exposing Agile in the DMZ.
- Modest performance boost because Agile Web proxies reside with other Agile Application Server components

Disadvantages:

- An additional computer is needed.
 - Additional configuration requirements.
1. Install the Agile Web proxy files on the IIS computer in the DMZ.
 2. Set up the IIS folder as specified in this chapter.

Two Firewalls

In the second scenario, there are two firewalls—one between the DMZ and the internet, and one between the DMZ and the intranet. In this setup, the computers in the intranet are referenced by two IP addresses. There is IP address translation or network address translation between the DMZ and intranet to enable mapping external IP addresses to internal IPs of the computers. However, in such environments, third-party vendor applications typically encounter problems with firewall configuration.

- The IIS Web server resides on one computer in the DMZ, and the Agile Application Server resides on another computer in the intranet with Agile Viewer and the database.

Advantages:

- Firewall friendly and secure without exposing Agile in the DMZ.
- Modest performance boost because Agile Web proxies reside with other Agile Application Server components

Disadvantages:

- An additional computer is needed.
- Additional configuration requirements.

Configuring IIS as a Proxy Server for Agile PLM

When you install the Agile PLM Web Proxies component, the setup program creates the [\\agile_home\AgileProxies](#) folder. For example, if you accepted the default installation location at [\\Agile\Agile922](#), the AgileProxies folder appears in that folder. The AgileProxies folder contains the following files that enable communication between the IIS Web server and the Agile Application Server:

- oracle_proxy.dll — an ISAPI filter, which allows IIS to process HTTP requests
- 9ias.conf — initialization file to direct the proxy filters where to route the HTTP/HTTPS traffic specific to Agile PLM from IIS

To configure IIS to be a Web proxy server for Agile PLM:

1. On the Web server computer, Choose Start > Administrative Tools > Internet Information Services (IIS) Manager.

The Internet Information Services Manager window appears.

2. Expand the folder for Internet Information Services > servername.
3. right-click the Agile PLM Web Site, and choose Properties from the shortcut menu.

The Agile PLM Web Site Properties dialog box appears.

Note	Due to security vulnerabilities, we recommend that you don't use the Default Web Site installed with Internet Information Server and instead create a new Web site named Agile PLM Web Site. For more information, see "Configuring Internet Information Server".
------	---

4. Click the Home Directory tab.
 5. Set the permissions to Scripts and Executables.
 6. Select the ISAPI Filters tab.
 7. Click Add.
- The Add/Edit Filter Properties dialog box appears.
8. Type oproxy in the Filter Name field.
 9. Click Browse and locate the oracle_proxy.dll file from [\\agile_home\AgileProxies](#) folder. After you select the oracle_proxy.dll file, click Open to close the dialog box.
 10. In the Add/Edit Filter Properties dialog box, Click OK.

The Agile PLM Web Site Properties dialog box appears.

11. Click OK to close the Agile PLM Web Site Properties dialog box.
 12. right-click the Agile PLM Web Site, and choose New > Virtual Directory from the shortcut menu.
- The Virtual Directory Creation Wizard appears.
13. Click Next.
 14. Type oproxy in the Alias field. Click Next.
 15. On the Web Site Content Directory page, click Browse, locate the [\\agile_home\AgileProxies](#)

folder, and then Click OK. Click Next.

16. Check the Execute checkbox. Click Next.
17. Click Finish.
18. Select the Web Service Extensions folder.
19. Select All Unknown ISAPI Extensions.
20. Click Allow.
21. Close IIS Manager.
22. Restart IIS.

Note	To restart IIS, stop all of the IIS services through the control panel and then restart them, or restart the computer. This ensures that the .dll is reloaded. Do not use IIS Manager to restart IIS.
------	---

Testing the Configuration

After you set up the oproxy ISAPI filter, you should test whether the filter loads successfully.

To make sure the oproxy filter added to ISAPI Filters tab is loaded properly on the Web server:

1. Select the Agile PLM Web Site node, right-click, and choose Properties from the shortcut menu.

The Agile PLM Web Site Properties dialog box appears.

2. Select the ISAPI Filters tab.

The status for the oproxy filter shows an arrow pointing up, indicating that it is loaded on the IIS Web server and ready to proxy all external HTTP/HTTPS requests to the Agile Web client server.

Note	If the arrow is not pointing up, the filter is not loaded properly. In that case, restart the computer.
------	---

The IIS Web server is now ready to accept all external Agile Web clients using HTTP requests on standard ports 80. The IIS Web server provides a proxy to the application server running Agile Web clients on the port you specified during the Agile Application Server installation.

Configuring IIS as a Proxy Server for Agile File Manager

When you install Agile Web proxies, the setup program creates the [\\agile_home\AgileProxies](#) folder. For example, if you accepted the default installation location at [\\Agile\Agile922](#), the AgileProxies folder appears in that folder.

The [\\agile_home\AgileProxies](#) folder contains the following files that enable communication between the IIS Web server and the File Manager (Tomcat):

- isapi_redirect.dll - The IIS server plugin.
- workers.properties - A file that describes the hosts and ports used by Tomcat processes.
- uriworkmap.properties - A file that maps URL-Path patterns to Tomcat processes.

Note	If you set up a Web proxy server for Agile File Manager that is different from the server or port you specified when you installed Agile PLM, you must make sure that File Manager points to the proxy server on the correct port. For more information, see “Reconfiguring File Manager After Setting Up a Web Proxy Server” (on page 46).
------	---

To configure IIS as a proxy server for File Manager:

On the File Manager computer, open the agile_home/Tomcat/conf/jk2.properties file.

1. Add the following entry, replacing @AJP-PORT@ with the actual AJP port number:
[channelSocket.port=@AJP-PORT@](#)

Note	To see which AJP port number to enter, open the agile_homeTomcat/conf/server.xml file and look for the following section:
------	---

```
<!-- Define a Coyote/JK2 AJP 1.3 Connector on port 8009 -->  
<Connector port="8009" enableLookups="false" redirectPort="8443" debug="0"  
protocol="AJP/1.3" />
```

2. On the Web server computer, Choose Start > Administrative Tools > Internet Information Services (IIS) Manager.

The Internet Information Services Manager window appears.

3. Expand the folder for Internet Information Services > servername.
4. right-click the Agile PLM Web Site, and choose Properties from the shortcut menu.

The Agile PLM Web Site Properties dialog box appears.

Note	Due to security vulnerabilities, we recommend that you don't use the Default Web Site installed with Internet Information Server and instead create a new Web site named Agile PLM Web Site. For more information, see “Configuring Internet Information Server”.
------	---

5. Select the ISAPI Filters tab.
6. Click Add.
The Add/Edit Filter Properties dialog box appears.
7. Type Jakarta IIS Connector in the Filter Name field.
8. Click Browse and locate the isapi_redirect.dll file from the \\agile_home\AgileProxies folder. After you select the isapi_redirect.dll file, click Open to close the dialog box.
9. In the Add/Edit Filter Properties dialog box, Click OK.
The Agile PLM Web Site Properties dialog box appears.
10. Click OK to close the Agile PLM Web Site Properties dialog box.
11. right-click the Agile PLM Web Site, and choose New > Virtual Directory from the shortcut menu.
The Virtual Directory Creation Wizard appears.
12. Click Next.
13. On the Virtual Directory Alias page, type Jakarta as the alias name. Click Next.

14. On the Web Site Content Directory page, click Browse, locate the \\agile_home\AgileProxies folder, and then Click OK. Click Next.
15. On the Access Permissions page, make sure the Execute checkbox is checked. Click Next.
16. Click Finish.
17. Close IIS Manager.
18. Open the workers.properties file in the agile_home\AgileProxies folder.
19. Make sure the File Manager host name is correct in the following entry:
worker.ajp13w.host=<File Manager host name>
20. Save and close the file.
21. Restart IIS.

Note	To restart IIS, stop all of the IIS services through the control panel and then restart them, or restart the computer. This ensures that the .dll is reloaded. Do not use IIS Manager to restart IIS.
------	---

Testing the Configuration

After you set up the Jakarta IIS Connector ISAPI filter, you should test whether the filter loads successfully.

To make sure the isapi_redirect filter added to ISAPI Filters tab is loaded properly on the Web server:

1. Select the Agile PLM Web Site node, right-click, and choose Properties from the shortcut menu.
The Agile PLM Web Site Properties dialog box appears.
2. Select the ISAPI Filters tab.

The status for the Jakarta IIS Connector filter shows an arrow pointing up, indicating that it is loaded on the IIS Web server and ready to proxy all requests to the File Manager.

Note	If the arrow is not pointing up, the filter is not loaded properly. In that case, restart the computer.
------	---

Configuring Apache Web Server as a Proxy Server for Agile PLM and Agile File Manager

On UNIX operating systems, you can use Apache Web Server as the Web proxy server for Agile PLM. If you choose the Apache Web Server when you install Agile PLM, you must specify the Apache Home Directory.

Note	If you set up a Web proxy server for Agile File Manager that is different from the server or port you specified when you installed Agile PLM, you must make sure that File Manager points to the proxy server on the correct port. For more information, see " Reconfiguring File Manager After Setting Up a Web Proxy Server " (on page 46)".
------	--

Configuring Apache Web Server on Solaris

This section shows how to configure an Apache Web Server 2.0.55 proxy for Agile PLM and Agile File Manager on Oracle Application Server 10g for Solaris.

Apache Http Server 2.0.x for Solaris:

<http://archive.apache.org/dist/httpd/binaries/>

Mod_Jk Connector for Apache 2.0:

Download the connector from <http://www.apache.org/dist/tomcat/tomcat-connectors/jk/binaries/solaris/> or copy the mod_jk-1.2.15-sparc-Solaris8-Apache20.so file from the <Agile_Home>\AgileProxies directory.

To configure Apache Web Server to be a Web proxy server for Agile PLM and Agile File Manager on Solaris:

1. Download, build, and install Apache Web Server for Solaris. For installation instructions, refer to the Apache documentation.

```
./configure --prefix=/opt/apache2 -enable-mods-shared=all  
make  
make install
```

2. After installing Apache Web Server, install the proxy plug-in:

- a. Go to the following directory:

`$Apache/modules/proxy`

- b. Run the following commands:

```
$Apache/bin/apxs -i -a -c proxy_connect.c  
$Apache/bin/apxs -i -a -c proxy_http.c
```

3. Download the Mod_Jk Tomcat Connector from the URL listed above or copy the mod_jk-1.2.15-sparc-Solaris8-Apache20.so file from the agile_home\AgileProxies directory. Save the connector as \$Apache/modules/mod_jk.so.
4. Create a Mod_Jk configuration file (\$Apache/conf/workers.properties) with the following entries:

```
worker.list=default  
worker.default.type=ajp13  
worker.default.host=<File Manager host name>  
worker.default.port=8009
```

5. Add the following lines to the \$Apache/conf/httpd.conf file:

```
#Enable Mod_proxy for Application Server Proxying  
LoadModule proxy_connect_module modules/mod_proxy_connect.so  
LoadModule proxy_http_module modules/mod_proxy_http.so  
#Enable Mod_Jk for File Manager proxying
```

```
LoadModule jk_module modules/mod_jk.so

# Add the proxy forward path. Replace appropriately with actual Virtual
# path and server host/port
ProxyPass /Agile http://server:7777/Agile
ProxyPassReverse /Agile http://server:7777/Agile

#Entries for File mgr proxying
JkWorkersFile conf/workers.properties

#Filemgr is virtual path for Agile File Manager
JkMount /Filemgr default
JkMount /Filemgr/* default
```

6. If mod_proxy was not compiled into httpd, add the following to the \$Apache/conf/httpd.conf file:

```
LoadModule proxy_module modules/mod_proxy.so
```

Open \$Tomcat/conf/jk2.properties and add the following entry: `channelSocket.port=8009`

The AJP Port specified above must match the AJP port specified in \$Tomcat/conf/server.xml.

```
<Connector port="8009"
  maxThreads="150" minSpareThreads="25" maxSpareThreads="75"
  enableLookups="false" redirectPort="8443" debug="0"
  protocol="AJP/1.3" />
```

7. Restart Apache Tomcat.
8. Restart Apache Web Server.

```
$apache/bin/apachectl stop
$apache/bin/apachectl start
```

Configuring Apache Web Server on Linux

This section shows how to configure an Apache Web Server 2.0.x proxy for Agile PLM and Agile File Manager on Oracle Application Server 10g for Linux.

Generally, when you install Red Hat Linux it includes Apache Web Server 2.0 and the MOD_PROXY Connector. If your Linux server does not have Apache Web Server, you can download it from the following location:

Apache Http Server 2.0.x for Linux:
<http://archive.apache.org/dist/httpd/binaries/>

The Mod Jk Connector for Apache Http Server, which is necessary for using Apache as a proxy for Agile File Manager (Tomcat), can be installed using Red Hat RPM. You can also download the source from the following location and compile it.

Mod_Jk Connector for Apache 2.0:

<http://www.apache.org/dist/tomcat/tomcat-connectors/jk/binaries/linux/> or contact Agile Support.

To configure Apache Web Server to be a Web proxy server for Agile PLM and Agile File Manager on Linux:

1. Open the Apache Web Server \$Apache/conf/httpd.conf file and ensure that the following modules are uncommented:

```
LoadModule proxy_module modules/mod_proxy.so
LoadModule proxy_connect_module modules/mod_proxy_connect.so
LoadModule proxy_http_module modules/mod_proxy_http.so
```

2. At the end of the \$Apache/conf/httpd.conf file, add the following ProxyPass and ProxyPassReverse commands. Replace the hostname, port, and Agile virtual path with appropriate values for your server.

```
ProxyPass /Agile http://server:7777/Agile
ProxyPassReverse /Agile http://server:7777/Agile
```

3. Copy the workers.properties and uriworkerman.properties files from the agile_home/AgileProxies directory to the \$Apache/conf directory.
4. Replace the following tokens in the workers.properties and uriworkerman.properties files:

```
@FILE_SERVER_VIRTUAL_PATH@ = File Manager Virtual Path
@FILE-SERVER-HOST@ = Tomcat hostname or IP address
@AJP-PORT@ = Tomcat AJP Protocol port (This port can be found in
Tomcat's server.xml file)
```

5. Add the following lines to the \$Apache/conf/httpd.conf file:

```
LoadModule jk_module modules/mod_jk-1.2.14-apache-2.0.54.so
JkWorkersFile conf/workers.properties
JkMount conf/uriworkerman.properties
```

6. Open \$Tomcat/conf/jk2.properties and add the following entry:

```
channelSocket.port=8009
```

The AJP Port specified above must match the AJP port specified in \$Tomcat/conf/server.xml.

```
<Connector port="8009"
maxThreads="150" minSpareThreads="25" maxSpareThreads="75"
enableLookups="false" redirectPort="8443" debug="0"
protocol="AJP/1.3" />
```

7. Restart Apache Tomcat.

8. Restart Apache Web Server.

```
$apache/bin/apachectl stop
```

```
$apache/bin/apachectl start
```

Configuring Apache Web Server on AIX

This section describes how to configure Apache HTTP Server 2.0.x on AIX as a reverse proxy for Agile PLM with Oracle Application Server 10g and Agile File Manager with Apache Tomcat.

Download the Apache HTTP Server 2.0.x distribution:

Download the Apache Http Server 2.0.x distribution:

<http://archive.apache.org/dist/httpd/>

Alternatively, you may be able to find a pre-compiled version of the HTTP server for AIX here:

<http://archive.apache.org/dist/httpd/binaries/aix/>

Download the Apache Tomcat connector module (mod_jk) for Apache 2.0.x:

<http://www.apache.org/dist/tomcat/tomcat-connectors/jk/>

Alternatively, you may be able to find a pre-compiled version of the connector for AIX here:

<http://www.apache.org/dist/tomcat/tomcat-connectors/jk/binaries/aix/>

To configure an Apache HTTP Server on AIX as a reverse proxy server for Agile PLM and Agile File Manager:

1. Download and install (and if necessary, build) Apache HTTP Server for AIX. For instructions, refer to the documentation included in the Apache distribution.
2. After installing Apache HTTP Server, install the proxy plug-in:
 - a. Change to the following directory:
`$APACHE_HOME/modules/proxy`
 - b. Run the following commands:
`$APACHE_HOME/bin/apxs -i -a -c proxy_connect.c`
`$APACHE_HOME/bin/apxs -i -a -c proxy_http.c`
3. Download (and if necessary, build) the Apache Tomcat connector (mod_jk) from the URL previously listed. Save the connector as `$APACHE_HOME/modules/mod_jk.so`.
4. Create a configuration file (`$APACHE_HOME/conf/workers.properties`) for the Apache Tomcat connector with the following entries:

```
worker.list=default
```

```
worker.default.type=ajp13
```

```
worker.default.host=<File Manager host name>
```

```
worker.default.port=8009
```

5. Add the following lines to the `$APACHE_HOME/conf/httpd.conf` file:

```
#Enable Mod_proxy for Application Server Proxying
```

```
LoadModule proxy_connect_module modules/mod_proxy_connect.so
```

```
LoadModule proxy_http_module modules/mod_proxy_http.so
```

```
#Enable Mod_Jk for File Manager proxying
```

```
LoadModule jk_module modules/mod_jk.so
```

```
#Add the proxy forward path.Replace appropriately with actual Virtual
#path and server host/port
ProxyPass /Agile http://<application server hostname>:7777/Agile
ProxyPassReverse /Agile http://<application server
hostname>:7777/Agile
#Entries for File Mgr proxying
JkWorkersFile conf/workers.properties
#Filemge is the virtual path for Agile File Manager
JkMount /Filemgr default
JkMount /Filemgr/* default
```

6. If mod_proxy was not compiled into httpd, add the following line to the \$APACHE_HOME/conf/httpd.conf file:

```
LoadModule proxy_module modules/mod_proxy.so
```

7. Edit the file \$TOMCAT_HOME/conf/jk2.properties and add the following entry for the AJP port:

```
channelSocket.port=8009
```

The AJP Port specified above must match the AJP port specified in \$TOMCAT_HOME/conf/server.xml.

```
<Connector port="8009"
    maxThreads="150" minSpareThreads="25" maxSpareThreads="75"
    enableLookups="false" redirectPort="8443" debug="0"
    protocol="AJP/1.3" />
```

8. Restart Apache Tomcat.
9. Restart Apache HTTP Server.

```
$APACHE_HOME/bin/apachectl stop
$APACHE_HOME/bin/apachectl start
```

Enabling Debugging Information for the Jakarta Tomcat Connector

To troubleshoot problems with the Apache Web Server proxy for Agile File Manager, you can save debugging information for the Jakarta Tomcat Connector.

To save debugging information for the Jakarta Tomcat Connector:

1. Open the \$Apache/conf/httpd.conf, and add the following lines (after the JkMount setting):

```
JkLogFile "logs/mod_jk.log"
JkLogLevel debug
```

2. Save the file.
3. Restart Apache Web Server.

4. Open the log file and check for errors.

Logging In to the Agile Web Client

Open your browser and go to the following URL to test the Agile Web client setup:

`http://webserver_hostname/virtual_folder/PLMServlet`

Note	The URL is case-sensitive. The default virtual folder name is Agile. The location must have a public IP address that is externally accessible.
------	--

The login window for the Agile Web client appears in the browser.

Troubleshooting the Agile Web Client

This section provides the basics for troubleshooting the Agile Web client and Web server issues.

Confirming Accessibility

Confirm that the following connections are valid:

- Ping the Agile Application Server computer to make sure it is accessible from the Agile Web components computer and that the specified port is available.
- Make sure the IIS Web server is up and running on the specified ports, and that the specified DNS hostname is valid and registered for external accessibility by the Agile Web client browsers.

URL Error Messages

If you specify this URL in the browser and receive the message “Page not found,” check the following:

- Make sure that the IIS Web server is accessible.
- Open the `iisproxy.ini` file and make sure the client virtual path name is the same as the login URL for the Agile Web client.
- Make sure the Agile Viewer has started on the host computer.

If the following error message appears:

“Servlet tunneling to AgileViewerHost:5099 (IP=x.x.x.x) Connection state: ERROR”

- Check to see if the Agile Viewer hostname specified during the installation is correct and the port number is available. The information on the Agile Viewer hostname and port number is specified in the `web.xml` file.
- Make sure the Agile Viewer-specific ports are open from DMZ firewall to the internal firewall.

Log Files (Disk Space)

There are two log files for the Agile Web client:

- OASproxy log
- Web client log

If all log files are on, disk space can fill quickly. You may need to clean up the log files or turn logging off.

For the OASproxy.log file:

1. Locate the key, HKEY_LOCAL_MACHINE\SOFTWARE\ORACLE\IIS Proxy Adapter, in the Windows Registry Editor.
2. Add the log-level entry value in the right pane as debug.

For the Agile Web client log file:

1. Open the \\agile_home\agileDomain\config\log.xml file.
2. Change the <priority value="debug" /> line to <priority value="error" />.
3. Delete all files with a LOG extension appearing in the \\agile_home\agileDomain\config folder.

Connection Refused or Server is Busy Error Message

TCP connections can be buffered in a wait queue, which has a default value of 50. To increase this value, open \\agile_home\agileDomain\config\config.xml and increase the wait queue attribute value by 25 percent until the messages no longer appear.

Changing Logging Priority

You can change the behavior of the information added to the log file for the Agile Web client.

1. Using a text editor, open the log.xml file (by default, it is located in \\agile_home\agileDomain\config folder).
2. Scroll to the bottom of the file and add the following lines before the </configuration> line:

```
<category name="com.agile">
  <priority value="error" />
  <appender-ref ref="A1" />
</category>
```
3. Save and close the file.
4. Open a browser and type the following in the Address field:
`http://hostname:portnumber/virtual_folder/PLMServlet?changeLog=true`

Configuring the Microsoft Excel-based Client for Agile PG&C

This chapter includes the following:

▪ Overview of the Microsoft Excel-based Client for Agile PG&C	63
▪ Microsoft Excel-based Client FAQ	65
▪ Configuration Sequence	67
▪ Setting Privileges for Agile PG&C Objects	67
▪ Enabling Attributes that are Required for Excel Rollups	69
▪ Restricting the Length of Declaration Names	70
▪ Deploying License Files for the Agile PLM ActiveX Control	71
▪ Using the Developer Version of the Microsoft Excel Integration License File	72
▪ Digitally Signing the Agile PLM ActiveX Control	72
▪ Enabling Downloading of Productivity Components	73
▪ Installing the Agile PLM ActiveX Control	73
▪ Modifying Excel-based Process Extensions for Japanese Versions	74
▪ Testing the Microsoft Excel-based Client for Agile PG&C	76
▪ Troubleshooting	78

Overview of the Microsoft Excel-based Client for Agile PG&C

Important Configuration steps described in this chapter apply only to customers who have purchased Agile Product Governance & Compliance.

Agile Product Governance & Compliance (PG&C), one of the Agile PLM product solutions, is designed to help manufacturers audit the presence and amount of regulated substances used in their products, and to demonstrate that they responsibly dispose of, recycle, or reuse parts containing those substances. Agile PG&C includes built-in support for the Microsoft Excel-based client for OEM manufacturing regulations, including the Japan Green Procurement Survey Standardization Initiative (JGPSSI), and substances and weights rollups.

Important Although Agile provides two Microsoft Excel templates for Agile PG&C, the solution is extensible. You can develop other Microsoft Excel templates to handle other Declaration classes your company has defined. For information about how to develop Microsoft Excel templates for use with Agile PG&C, contact your Agile Solutions Delivery representative.

Important After installing Agile PLM, if any of the changes detailed in this chapter are required for your Excel integration, the correct sequence is: (a) stop the application server(s); (b) undeploy; (c) make the changes in <standard Agile PLM Install folder> > application.ear; (d) re-

deploy; and (e) re-start the servers.

JGPSSI Support

JGPSSI has created a standardized digital form that companies can use to inquire about the chemical substances contained in parts and materials they procure in Asia. For more information about JGPSSI, see the Japan Electronics and Information Technology Industries Association Web site:

<http://home.jeita.or.jp/eps/greenTOP-eg.html> (<http://home.jeita.or.jp/eps/greenTOP-eg.html>)

JGPSSI uses Microsoft Excel tools for collecting information about substances contained in assemblies for Japanese Green Procurement. Agile provides a flexible and reusable integration between Agile PG&C and Microsoft Excel that allows customers to use the JGPSSI spreadsheet without modification, and then upload the information to Agile PG&C after validation.

Note	Agile PLM supports the JGPSSI survey tool (a Microsoft Excel template) version 2.02.
------	--

Agile PLM supports a Japanese-language template of the JGPSSI spreadsheet. The Japanese-language templates are only available to customers who have purchased the Japanese Server License. Also, the administrator must set users' Language and Encode user preferences to the appropriate setting to work in that language in the Agile clients' user interfaces. Please contact Agile Solutions Delivery for more information.

Substances and Weights Rollups

You can use Microsoft Excel to perform analysis of the Bill of Substances (BOS) information for an assembly. Using the Actions menu command Rollup in Excel, the integrated Excel spreadsheet can roll up the substances and weights for the top-level assembly.

Note	Agile PLM supports a Japanese-language template of the Substances and Weights spreadsheet.
------	--

PLM also supports localized versions in Chinese, French, and German of the Substances and Weights Rollup feature used in Microsoft Excel-base Client. However, the localized template does not work for these languages out-of-the-box, the template must be adjusted by Agile Solutions Delivery.

The Japanese-language templates are only available to customers who have purchased the Japanese Server License. Localized versions also need appropriate License Key. Also, the administrator must set users' Language and Encode user preferences to the appropriate setting to work in that language in the Agile clients' user interfaces. Please contact Agile Solutions Delivery for more information.

Client Software Requirements

The Microsoft Excel-based client for Agile PG&C requires the following client-side software:

Operating System

- Windows 2000 Pro SPX

- Windows XP Pro SP2
- Windows 2003 Pro SP1

Client Applications

- Microsoft Excel 2000, Microsoft Excel XP, or Microsoft Excel 2003 Pro SP1
- Microsoft Internet Explorer 6.0

For complete Agile PLM software requirements, see the *Agile PLM Capacity Planning and Deployment Guide*.

Microsoft Excel-based Client FAQ

This section answers some common questions about the Microsoft Excel-based client for Agile PG&C.

How does the Microsoft Excel-based client work? What is the underlying technology used to integrate with Agile PG&C?

The Microsoft Excel-based client uses the following technology:

- Agile PLM Process Extensions – Agile Web Client launches the Microsoft Excel-based client through process extensions (PX), which are programs that extend the functionality of the client interface.
- Agile PLM ActiveX Control – an Internet Explorer plugin that monitors use of the Microsoft Excel-based client and downloads and uploads data from the Agile PLM server as requested by the client.
- HTTP, HTTPS, or SMTP – standard protocols used to move data between the server and the client
- Microsoft Excel – spreadsheet client with its own client-side business logic.

Other than Microsoft Excel, is any other client software required for the Microsoft Excel-based client?

The Agile PLM ActiveX Control, an Internet Explorer plugin, is required. It's downloaded and installed automatically the first time a user launches the Microsoft Excel-based client from Agile Web Client. Of course, Internet Explorer 6.0 is also required, as well as a Windows operating system.

What Microsoft Excel templates does Agile PG&C provide by default?

There are two Excel applications provided out-of-the-box with Agile P&C:

- JGPSSI Declaration application – supports Japanese Green Procurement
- Rollup In Excel application – calculates substances and weights rollups for top-level assemblies

Can I create new Microsoft Excel templates for use with Agile PG&C?

Yes, the solution is extensible. For information on how to develop Microsoft Excel templates for Agile PG&C, contact your Agile Solutions Delivery representative.

Can I create Microsoft Excel templates for use with other Agile PLM solutions, such as Product Collaboration?

No. Currently, only Declaration classes and their subclasses are supported. Other classes may be supported in future Agile PLM releases.

Can I use the Firefox browser to launch the Microsoft Excel-based client?

No. Only Microsoft Internet Explorer 6.0 is supported.

Must I be logged into Agile Web Client to use the Microsoft Excel-based client for Agile PG&C?

No. You can use the Microsoft Excel-based client synchronously (that is, by opening a spreadsheet from Agile Web Client) or asynchronously (that is, by opening a spreadsheet attached to an email message).

How do I launch the Microsoft Excel-based client from Agile Web Client?

Process extensions are used to launch the Microsoft Excel-based client. The process extension for launching JGPSSI-in-Excel is initiated from the Actions menu of JGPSSI declarations. The process extension for launching Substances and Weights rollup in Excel is initiated from the Actions menu of items. For information about developing process extensions, see the *Agile SDK Developer Guide*.

Can I sign the Agile PLM ActiveX Control with my company's certificate?

Yes. See "[Digitally Signing the Agile PLM ActiveX Control](#) (on page 72)".

Does the Microsoft Excel-based client require any special authentication?

The Microsoft Excel-based Client uses the same credentials that you use to log into Agile Web Client, and it prompts you to log into a separate Agile PLM session when you choose Agile > Submit Response or Agile > Open Request.

Where does the client-side business logic for the Microsoft Excel-based client reside?

Client-side business logic resides entirely in the Microsoft Excel template.

How does the Microsoft Excel-based client handle notifications for Declarations?

Agile PLM provides four system-generated notifications related to the Microsoft Excel-based client:

- Declaration Excel Submit Success Supplier Notification – notification sent to the supplier to confirm successful submission of a Declaration.
- Declaration Excel Submit Import Failure – notification sent to the compliance manager or originator to inform him that the submitted Declaration failed to be processed on the server due to import problems.
- Declaration Excel Submit Failure – notification sent to the compliance manager or originator to inform him that the submitted Declaration failed to be processed on the server due to an exception.
- Declaration Excel Submit Failure Supplier Notification – notification sent to the supplier to inform him that the Declaration failed to be submitted due to import errors.

Each notification includes text for the subject and body of a message. The Agile PLM administrator can modify these notification messages.

To customize these notifications, start the Agile Java Client and log in as an administrator user. Click the Admin tab, and choose System Settings > Notifications > Declaration Notifications. Microsoft

Excel-based client notifications are listed under “Declaration Miscellaneous Notifications.”

For more information about Agile PLM notifications, see the *Agile PLM Administrator Guide*.

What languages does the Microsoft Excel-based client support?

The JGPSSI and Rollup in Excel standard templates support English only. Other templates can be developed to support other languages.

Microsoft Excel-based client messages and captions support all languages supported by Agile PLM 9.2.2.1. Additionally, the menus of Microsoft Excel templates can be customized for different languages.

Does the Microsoft Excel-based client use VBA macros?

The Microsoft Excel templates provided for Agile PG&C do not use VBA macros. Although you are not prevented from developing a Microsoft Excel template that uses VBA macros, antivirus software may prevent the macros from running, and you should set the security level in Microsoft Excel to at least Medium (choose Tools > Macro > Security).

Configuration Sequence

To enable support for the Microsoft Excel-based client for Agile PG&C, you must perform the following manual configuration steps after Agile PLM has been installed:

1. Set up privileges for Agile PG&C objects (such as Substances and Declarations).
2. Enable specific attributes in PG&C-related classes to ensure the Microsoft Excel-based client functions correctly.
3. Restrict Declaration names to 50 characters for every class that you are enabling the Microsoft Excel-based client.
4. Obtain a production license for the Agile PLM ActiveX Control from your Agile Account Executive and deploy the related files on the Agile Application Server.
5. Optionally, digitally sign the Agile PLM ActiveX Control.
6. Use Agile Java Client to set the Allow Download of Productivity Components preference to Yes. This allows Agile Web Client users to download the Agile PLM ActiveX Control from the server.
7. Install the Agile PLM ActiveX Control.
8. Test that the Microsoft Excel-based client for Agile PG&C works properly.

Setting Privileges for Agile PG&C Objects

This section describes how to set privileges for Agile PG&C objects. If you don't ensure that privileges are properly set, you may not be able to move data from the JGPSSI spreadsheet into Agile PLM and vice versa.

To set privileges for Agile PG&C objects:

1. Log into Agile Java Client as a user with Administrator privileges.
2. Click the Admin tab.

3. Choose User Settings > Privileges.
4. Open the following privilege masks, and for each one click the drop-down arrow next to the Applied To field and add the following attributes:

Privilege Mask	Attributes to Add to the Applied To Field
Read Substances	Substances.Page Two.Text01 Substances.Page Two.Text25
Modify Substances	
Modify Supplier Created Declarations	
Read Declarations	
Read My Open and Submitted Declarations	
Read Supplier Created Declarations	
Modify Declarations	
Modify My Open Declarations	Declarations.Page Two.Text14, Text19 – Text21 Declarations.Items.Date01 Declarations.Items.List01 - List03 Declarations.Items.Text01 - Text09 Declarations.Manufacturer Parts.Date01 Declarations.Manufacturer Parts.List01 - List03 Declarations.Manufacturer Parts.Text01 - Text09 Declarations.Part Groups.Date01 Declarations.Part Groups.List01 - List03 Declarations.Part Groups.Text01 - Text09

1. After modifying the Applied To field for each of the privilege masks listed above, Click OK.
2. To save the privilege mask, click Save.
3. Click Close.
4. Click Close.

Enabling Attributes that are Required for Excel Rollups

The following attributes must be enabled (Visible property is set to Yes for each attribute) at the class level for the Microsoft Excel-based client to function correctly.

Classes: Parts, Manufacturer Parts, and Documents

Compliance Tab > Composition Table

- Specification Name
- Declaration Name
- Declared Weight
- Supplier

Compliance Tab > Substances Table

- Child Level
- Substance Name
- Substance Type
- Mass
- Declared PPM
- CAS Number
- Conversion Factor

Classes: Parts and Documents

BOM Tab

- Item Number
- Item Description
- Item Rev (Item Revision)
- Qty (Quantity)

Manufacturers Tab

- Mfr. Part Number
- Mfr. Part Description
- Mfr. Name

Restricting the Length of Declaration Names

Agile's Microsoft Excel-based client requires Declaration names to not exceed 50 characters. If a Declaration has a name longer than 50 characters, you might not be able to open it in Microsoft Excel.

To avoid potential problems opening Declarations with long names, you should restrict Declaration names to 50 characters for every class that you are enabling the Microsoft Excel-based client. You can do this by making autonumbers required (assuming that each number in the autonumber sequence does not exceed 50 characters) or by adjusting the maximum length of the Cover Page > Reference Number attribute.

To make autonumbers required for a Declaration subclass:

1. Log into the Agile Java Client as an administrator.
2. Click the Admin tab.
3. Under Data Settings, double-click Classes.
4. Open a Declaration subclass that has enabled the Microsoft Excel-based client (for example, JGPSSI Declaration).
5. Select the General Information tab.
6. In the Autonumber Required list, select Yes.
7. In the Autogenerate list, select Yes.
8. Click Save.

To adjust the maximum length of Declaration names:

1. Log into the Agile Java Client as an administrator.
2. Click the Admin tab.
3. Under Data Settings, double-click Classes.
4. Open a Declaration class that has subclasses that have enabled the Microsoft Excel-based client (for example, JGPSSI Declarations).
5. Click the User Interface Tabs tab.
6. double-click Cover Page.
7. Click the Attributes: Cover Page tab.
8. double-click the Reference Number attribute.
9. Set the MaxLength property to 50 or less.
10. Click Save.

Deploying License Files for the Agile PLM ActiveX Control

To enable support for the Microsoft Excel-based client for Agile PG&C, you must obtain a valid license for the Agile PLM ActiveX Control, an Internet Explorer plugin. This license is specific to the server on which the Agile Application Server is installed. To obtain the license file (license.xml) and a properties file (properties.js), contact your Agile Account Executive.

After you obtain the license file and properties file, you need to deploy the files on the Agile Application Server.

Note	If you have an application server cluster, you must deploy the Agile PLM ActiveX Control license files on the Respository Host server for Oracle Application Server or the Administration Server for WebLogic Server. The application server will then propagate the license files to other servers in the cluster.
-------------	---

To deploy license files for the Agile PLM ActiveX Control:

1. Stop the Web proxy server.
2. Stop the Agile Application Server.
3. Windows: On the application server computer, open a command prompt window.
 UNIX: On the application server computer, open a terminal window and log on as the user who installed the Agile Application Server.
4. Expand the Agile application.ear file:
 Windows: `\agile_home\install\bin\ExtractArchive.cmd`
 UNIX: `/agile_home/install/bin/ExtractArchive.sh`
5. Copy the license.xml and properties.js files that you received from Agile to the following location:
`\agile_home\agileDomain\applications\ExpandedEar\ExpandedWar\ambassador`
6. Repack the Agile application.ear file:
 Windows: `\agile_home\install\bin\RepackArchive.cmd`
 UNIX: `/agile_home/install/bin/RepackArchive.sh`
7. Undeploy the Agile application, and then redeploy it.
 Windows:
`\agile_home\agileDomain\bin\UnDeployAgile.cmd`
`\agile_home\agileDomain\bin\DeployAgile.cmd`
 UNIX:
`/agile_home/agileDomain/bin/UnDeployAgile.sh`
`/agile_home/agileDomain/bin/DeployAgile.sh`
8. Start the Agile Application Server.
9. Start the Web proxy server.

Using the Developer Version of the Microsoft Excel Integration License File

If you are developing or testing Microsoft Excel templates for Agile PLM Declaration classes, you can use the developer version of the Microsoft Excel integration license file that is installed with the Agile PLM server. The developer license for the Agile PLM ActiveX Control provides the same functionality as the production license. However, when you install it, a warning message appears: "An UNTRUSTED web site is trying to use Agile PLM ActiveX Control to control your desktop." Click Yes in the warning dialog box to continue installing the control.

Digitally Signing the Agile PLM ActiveX Control

The first time you choose one of the commands that launch the Microsoft Excel-based client (such as Actions > Open In Excel) in Agile Web Client, the Agile PLM ActiveX Control is automatically downloaded and installed on your computer. For security reasons, Internet Explorer requires that software it downloads must have a digital signature. A digital signature lets you verify the contents of a file and ensures that it comes from a trusted source.

When you install Agile PLM, the Agile PLM ActiveX Control is already digitally signed from Agile Software. You can choose to use your company's own digital signature for the control instead. If you use your company's digital signature, each time a user of your Agile PLM system downloads the Agile PLM ActiveX Control it will be recognized as coming from your company and not from Agile Software.

You provide a digital signature by purchasing a certificate from a certificate authority. A certificate authority is an entity that issues digital certificates for use by other parties. Examples of certificate authorities are Verisign (<http://www.verisign.com/>) and CAcert (<http://www.cacert.org/>).

For more information about digital signatures, go to the MSDN site (<http://msdn.microsoft.com/>) and search for "Digitally Signing ActiveX Components".

To digitally sign the Agile PLM ActiveX Control:

1. Stop the Web proxy server.
2. Stop the Agile Application Server.
3. Windows: On the application server computer, open a command prompt window.
UNIX: On the application server computer, open a terminal window and log on as the user who installed the Agile Application Server.
4. Expand the Agile application.ear file
Windows: `\agile_home\install\bin\ExtractArchive.cmd`
UNIX: `/agile_home/install/bin/ExtractArchive.sh`
5. Digitally Sign the agileambassador.cab file found in the following location:
`\agile_home\agileDomain\applications\ExpandedEar\ExpandedWar\ambassador`

6. Repack the Agile application.ear file
 Windows: `\agile_home\install\bin\RepackArchive.cmd`
 UNIX: `/agile_home/install/bin/RepackArchive.sh`
7. Undeploy the Agile application, and then redeploy it.
 Windows:
`\agile_home\agileDomain\bin\UnDeployAgile.cmd`
`\agile_home\agileDomain\bin\DeployAgile.cmd`
 UNIX:
`/agile_home/agileDomain/bin/UnDeployAgile.sh`
`/agile_home/agileDomain/bin/DeployAgile.sh`
8. Start the Agile Application Server.
9. Start the Web proxy server.

Enabling Downloading of Productivity Components

The Agile PLM ActiveX Control is a plugin for Microsoft Internet Explorer that users can download to their client machines. To enable downloading of the Agile PLM ActiveX Control from the server, the Agile PLM administrator must log into the Agile Java Client and make sure the Agile PLM preference named Allow Download of Productivity Components is set to Yes. Otherwise, users won't be able to download the ActiveX control and use the Microsoft Excel-based client.

Note	The Agile PLM ActiveX Control is supported only on the Microsoft Internet Explorer browser. You cannot use it with other browsers, such as Firefox.
------	---

To enable downloading of the Agile PLM ActiveX Control:

1. Log into Agile Java Client as a user with Administrator privileges.
2. Click the Admin tab.
3. Choose Server Settings > Preferences.
4. For the Allow Download of Productivity Components preference, select Yes.
5. Click Save.

For more information about setting Agile PLM preferences, see the *Agile PLM Administrator Guide*.

Installing the Agile PLM ActiveX Control

If you enable downloading of the Agile PLM ActiveX Control (see the previous section), the plugin is installed automatically on the client computer when you choose a command (such as Actions > Open In Excel) that launches the Microsoft Excel-based client. Separate installation of the plugin is unnecessary.

Some companies have strict security procedures that prohibit users from installing ActiveX controls automatically onto their desktop computers. If that is the case with your company, your IT department can install the Agile PLM ActiveX Control by downloading an installer for the plugin from

the Agile Support site
(<http://support.agilesoft.com> (<http://support.agile.com>)).

Modifying Excel-based Process Extensions for Japanese Versions

This section describes how to modify process extensions for the Japanese templates. Recall that Agile Web Client launches the Microsoft Excel-based client through process extensions, which are programs that extend the functionality of the client interface.

Supporting the Japanese Version of the JGPSSI Template

In Java Client, modify the URL for the Open In Excel process extension to append the mapfile request argument:

```
mapfile=ExcelApplications_JP.xml
```

For example:

```
http://pgctest.agile.agilesoft.com/Agile/AmbassadorServlet?action=open&internalurl=true&height=220&width=365&mapfile=ExcelApplications_JP.xml
```

```
http://myserver.agile.agilesoft.com:8888/web/AmbassadorServlet?action=open&internalurl=true&height=220&width=365&mapfile=ExcelApplications_JP.xml
```

Note	You can create a new process extension with a different caption for the Japanese version of the JGPSSI template. In this case, both English and Japanese templates are supported. If you want to use Japanese JGPSSI, you must log in to the Agile system as a Japanese user to perform Actions > Open In Excel. This is required both for users at your company and any supplier users on the Excel client.
------	--

Supporting the Japanese Version of Substances and Weights Rollups

In Java Client, modify the URL for the Rollup in Excel process extension (which opens the Substances and Weights template) to append the mapfile request argument:

```
mapfile=ExcelApplications_JP.xml
```

For example:

```
http://pgctest.agile.agilesoft.com/Agile/default/Rollup.jsp?action=open&internalurl=true&height=220&width=365&mapfile=ExcelApplications_JP.xml
```

```
http://myserver.agile.agilesoft.com:8888/web/default/Rollup.jsp?action=open&internalurl=true&height=220&width=365&mapfile=ExcelApplications_JP.xml
```

Note	You can create a new PX with a different caption for the Japanese version of the Substances and Weights template. In this case, both English and Japanese templates are supported. If you want to use Japanese Substances and Weights Rollup, you must log in to the Agile system as a Japanese user to perform Actions > Rollup in Excel. This is required both for users at your company and any supplier users on the Excel client.
------	--

Supporting Other Languages in Substances and Weights Rollups

Agile PLM supports localized versions of the Rollup in Excel process extension (which opens the Substances and Weights template) in Simplified Chinese, Traditional Chinese, French, and German.

Note	The localized template does not work for these languages out-of-the-box, the template must be adjusted by Agile Solutions Delivery.
------	---

1. Add the language version of Rollup template to

ambassador\templates as rollup_<language>.xls

For example, Simplified Chinese is rollup_zh.xls.

Important Herein, the expression “ambassador” is intended to designate the “Ambassador” folder provided in the Agile PLM build. It is under the standard Agile PLM Install folder, where an ear file – application.ear – is deployed to the application server.

2. Under ambassador\scripts\resources, create a copy of the rollup_en.properties and name it rollup_<language>.properties. For example, Simplified Chinese is rollup_zh.properties.

Edit rollup_<language>.properties to change the translation after each equal sign (=) in this language translation.

Under ambassador\xml, create a copy of the rollup.xml and name it rollup_<language>.xml. For example, Simplified Chinese is rollup_zh.xml. Edit rollup_zh.xml as follows:

- a. Replace all rollup_en.properties with the language property file rollup_zh.properties
- b. Modify the "source" attribute value of the <form> element under the Open Assembly button item.

Add the new URL parameter mapfile=ExcelApplications_ZH.xml. Use this language's map file.

<form

source="@VIRTUALPATH@/default/RollupData.jsp?classID=@FLEXFIELD3@&mapfile=ExcelApplications_ZH.xml" height="350" width="580"/>

3. Create a copy of the ExcelApplications.xml under ambassador\config. Name the copy as ExcelApplications_<language>.xml. For example, Simplified Chinese is like ExcelApplications_ZH.xml.

Edit it to specify the attributes for the language version of the Substances and Weights template. For example, for Simplified Chinese:

```
<?xml version="1.0" encoding="UTF-8"?>
```

```
<ExcelApplications>
```

```
<ExcelApplication name="JGPSSI" baseClass="Declaration"
```

```
  subclassName="JGP Declaration"
```

```
  classId="2000002423" subclassID="2000002421" titleblockNameAttrId="agile.2000002615"
```

```
  initXMLTemplate="JGPSSI.xml" excelTemplate="JGPSSI.xls" exportXSL="aXMLToJGPSSI.xsl"
```

```
  submitXMLTemplate="jgpssi_submit.xml" attachXlsOnSubmit="true" />
```

```
<ExcelApplication name="Rollup" baseClass="Item" subclassName="Part"
```

```
  classId="10000" subclassID="2000002365"
```

```
titleblockNameAttrId="agile.1001" initXMLTemplate="rollup_zh.xml" excelTemplate="rollup_zh.xls" />  
</ExcelApplications>
```

4. In Java Client, modify the URL for the Rollup in Excel process extension to append the mapfile request argument:

mapfile=ExcelApplications_<language>.xml

For any localized template ("ZH" specifies Simplified Chinese):

http://pgctest.agile.agilesoft.com/Agile/default/Rollup.jsp?action=open&internalurl=true&height=220&width=365&mapfile=ExcelApplications_ZH.xml

http://myserver.agile.agilesoft.com:8888/web/default/Rollup.jsp?action=open&internalurl=true&height=220&width=365&mapfile=ExcelApplications_ZH.xml

Note	You can create a new process extension with a different caption for the localized version of the Substances and Weights template. In this case, both English and the localized language's templates are supported. If you want to use localized Substances and Weights Rollup, you must log in to the Agile system as a user in the localized language to perform Actions > Rollup in Excel. This is required both for users at your company and any supplier users on the Excel client.
------	--

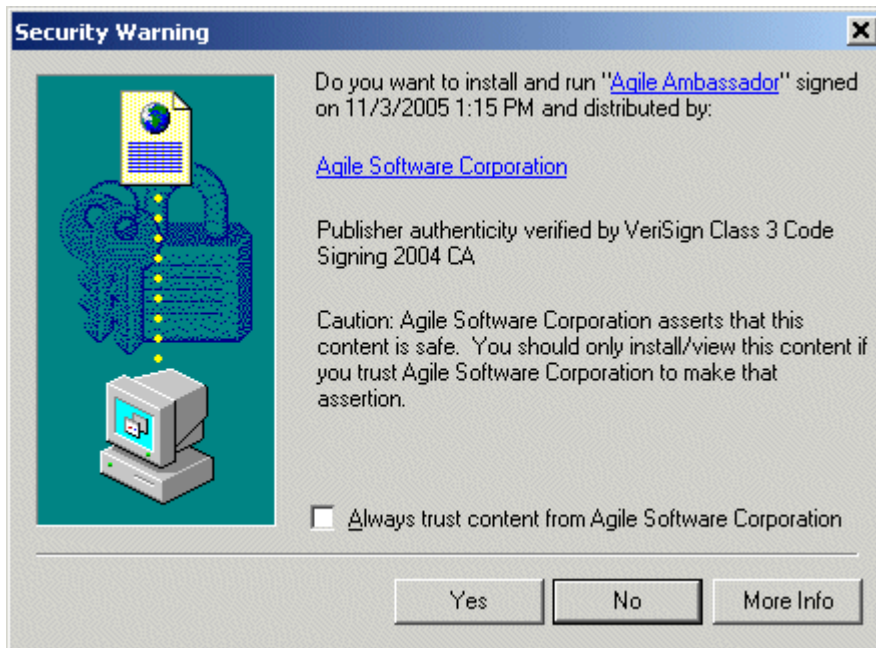
Testing the Microsoft Excel-based Client for Agile PG&C


This section describes how to test whether the Microsoft Excel-based client works properly.

To test JGPSSI Declarations:

1. In Agile Web Client, choose Create > Declarations > JGPSSI Declarations.
2. Specify a supplier. Also, make sure the Continue Creation in Wizard box is checked. Click Continue.
3. In the Compliance Manager field, select a user who is a compliance manager.
4. In the Workflow field, select Default Declarations. Click Next.
5. On the Add Specifications page, click Next.
6. On the Add Items page, click Add to add an item. Type an existing item number and Click OK.
7. Click Finish.

8. Choose Actions > Open in Excel. After a moment, a Security Warning dialog box appears.



9. Make sure the Always trust content from Agile Software Corporation box is checked. Click Yes to install and run the Agile PLM ActiveX Control (also called Agile Ambassador).
10. After a moment, Microsoft Excel is launched and a file with the name *declaration_number.xls* is opened. You are prompted to save the file to a folder on your desktop called Agile Spreadsheet Files. Click Save.
11. Close Microsoft Excel and return to Agile Web Client.
12. For the new JGPSSI Declaration you created, click Next Status to open it to the supplier.
13. Select users to notify, and Click OK.
14. Click the Exit  button to log out.
15. Click Login. Log in as a contact user for the supplier associated with the JGPSSI Declaration.
16. Click the link to the JGPSSI Declaration to open it.
17. In the Navigation pane, click Open In Excel.
18. After a moment, Microsoft Excel is again launched and the same file as earlier is opened. You are prompted to save the file to a folder on your desktop called Agile Spreadsheet Files. You already saved it earlier, so click Cancel.
19. Fill in a one or more fields on the sheet. For example, change the value of the Parts Mass field.
20. Save the Microsoft Excel file.
21. Choose Agile > Submit Response. You need to log in at this point. The Submit Response window appears.
22. Type your approval password, and click Submit.
23. After your response is uploaded, a message box appears: "The declaration has been submitted

for processing. Updates may not be immediately visible in the Agile system.” Click OK.

To test Substances and Weights Rollups:

1. In Agile Web Client, open a part that is a top-level assembly with multiple substances.
2. Choose Actions > Rollup in Excel.
3. Select the specification that is used for the composition, and Click OK. The Excel file with the same filename as the part number appears.
4. In the Excel file, choose Agile > Run Scenario. The rolled-up amounts for materials and substances used in the assembly are displayed.

Troubleshooting

This section provides solutions to problems you may encounter in configuring the Microsoft Excel-based client for Agile PG&C.

Import and Error Logs

Import and error logs for the Microsoft Excel-based client can be found in the server's Temp folder.

On Windows 2000/2003 servers, the Temp folder is usually found at

C:\Documents and Settings\<current_logged_in_user>\Local Settings\Temp\AgileEITemp
or

C:\Winnt\Temp\AgileEITemp

If you are unsure where to find the Temp folder, open a Command Prompt window and type the following command:

```
cd %temp%\AgileEITemp
```

On UNIX servers, the Temp directory is usually found at

/var/tmp/AgileEITemp

The most recent folder under AgileEITemp contains data and import or error logs of the last submission done in Excel

Runtime error

When you choose any command that launches the Microsoft Excel-based client (such as Actions > Open In Excel) in Agile Web Client, a Runtime Error window appears.

Solution:

The license files for the Agile PLM ActiveX Control, which are located on the Agile Application Server, are invalid. Please contact Agile Support to request new license files. Once you receive the files, you must deploy them on the application server. See [“Deploying License Files for the Agile PLM ActiveX Control”](#) (on page 71).

This feature has not been enabled by the application administrator

When you choose an Action that launches the Microsoft Excel-based client in Agile Web Client, the popup window reads, “This feature has not been enabled by the application administrator.” Consequently, the Agile PLM ActiveX Control could not be downloaded.

Solution:

In the Agile Java Client, set the Agile PLM preference Allow Downloading of Productivity Components to Yes. See “[Enabling Downloading of Productivity Components](#) (on page 73)”.

The page cannot be displayed

When you choose an Action that launches the Microsoft Excel-based client in Agile Web Client, the popup window reads, “The page cannot be displayed.”

Solution:

Make sure the Web proxy server is running.

Instead of opening a Microsoft Excel file, Agile Web Client login page appears in another window

When you choose an Action that launches the Microsoft Excel-based client in Agile Web Client, the Microsoft Excel file doesn’t appear and instead a new browser window opens with Agile Web Client login page.

Solution:

- Make sure Agile Web Client login page you’re using has the fully qualified domain name for the server in the URL. For example, if the fully qualified domain name of the server is “plm.mycompany.com”, Agile Web Client login page URL should look like this:
`http://plm.mycompany.com/Agile/PLMServlet`
- Make sure the Agile PLM ActiveX Control license file (license.xml) uses a fully qualified domain name for the Agile Application Server.

The Open In Excel pop-up window appears and then closes, but Microsoft Excel doesn’t launch

When you choose an Action that launches the Microsoft Excel-based client in Agile Web Client, the Open In Excel pop-up window appears for a few seconds, and then it closes without launching Microsoft Excel.

Solution:

The Declaration you’re trying to open has a very long name. Choose Actions > Save As to save the Declaration with a name that is 50 characters or less.

To avoid this problem, restrict Declaration names to 50 characters. See “[Restricting the Length of Declaration Names](#) (on page 70)”.

The Actions menu does not include commands to launch the Microsoft Excel-based client

When you open an Item in Agile Web Client, the Rollup in Excel command isn’t available on the Actions menu. When you open a JGPSSI Declaration in Agile Web Client, the Open In Excel, Import JGPSSI, and Export JGPSSI commands aren’t available on the Actions menu.

Solution:

The Agile PG&C process extensions have not been assigned to Agile PLM classes. The Agile

PG&C process extensions are assigned automatically to classes when Agile PLM is installed, but perhaps the Administrator modified the classes and inadvertently unassigned the Agile PG&C process extensions.

Here is how the Agile PG&C process extensions should be assigned:

- The Rollup In Excel process extension must be manually assigned to the Items classes, that is, Parts and Documents.
- The Open In Excel, Import JGPSSI, and Export JGPSSI process extensions should be automatically assigned to the JGPSSI Declarations class. Please verify that this was accomplished; if they did not load, it needs to be done manually.

For information on how to assign process extensions to classes, see the *Agile PLM Administrator Guide*.

The cell or chart you are trying to change is protected and therefore read-only

When you open a JGPSSI Declaration in Microsoft Excel and try to edit one of the cells, you see the following error message: "The cell or chart you are trying to change is protected and therefore read-only. To modify a protected cell or chart, first remove protection using the Unprotect Sheet command (Tools menu, Protection submenu). You may be prompted for a password."

Solution:

The colored cells of the JGPSSI template (such as headings) are protected and cannot be edited. You should edit only unshaded (white) cells.

Microsoft VBScript runtime error 1B6: Object doesn't support this property or method

When you choose any command that launches the Microsoft Excel-based client (such as Actions > Open in Excel) in Agile Web Client, an error message appears: "Microsoft VBScript runtime error 1B6: Object doesn't support this property or method."

Solution:

Internet Explorer had problems downloading the digital certificate for the Agile PLM ActiveX Control. Click OK in the error message box to continue.

The problem may be due to a comma in the Company field of the digital certificate. If there isn't a comma in the Company field, you may need to update your Internet Explorer browser with the latest patch from Microsoft.

You must restart your computer before the new settings will take effect

When you choose any command that launches the Microsoft Excel-based client (such as Actions > Open in Excel) in Agile Web Client, a message box appears: "You must restart your computer before the new settings will take effect. Do you want to restart your computer now?"

Solution:

You have a previous version of the Agile PLM ActiveX Control installed, and Microsoft Excel is currently open, so the control cannot be updated. To install the new control, close Excel, and then click No in the message box (to not restart the computer). Choose Actions > Open in Excel again.

Configuring Agile Product Portfolio Management

This chapter includes the following:

▪ Overview.....	81
▪ PPM Post Upgrade Utility	81
▪ Running the PPM Post Upgrade Utility	82

Overview

Agile Product Portfolio Management (PPM) gives you powerful capabilities to define, analyze, and manage all aspects of a project or program. In Agile PLM 9.2.2.1, some of the business rules have been changed. These changes impact the data you have already created because the computations were based on previous rules. During an upgrade from a previous version of PPM, data migration is necessary in order for the existing data to comply with the new business rules.

To facility the data migration, a post upgrade utility has been developed.

Note	The PPM post upgrade utility is NOT supported on WebSphere Application Server.
------	--

PPM Post Upgrade Utility

The PPM Post Upgrade utility was developed to address the following changes in Agile PLM 9.2.2.1:

- Identifies all resource pool assignments where actual hours are greater than zero and sets the actual hours value to zero.
- Identifies the leaf tasks that have an incorrect percent complete value, corrects the value, and then correctly rolls up the value on the parent task.
- Identifies the tasks where estimated dates should be corrected based on the new business rules:
 - a. If one of the estimated dates for a leaf task is null, it will be automatically populated, based on the other estimated date, only if the other date is not null.
 - b. The estimated date is rolled up to the parent task considering the schedule date of the child task, if the child's estimated date is null.
- Identifies all tasks that have an incorrect value for Actual Time and corrects them.

Running the PPM Post Upgrade Utility

The utility is installed after you have upgraded your system to Agile PLM 9.2.2.1. The files are located at `agile_home/agileDomain/tools/922PPMPostUpgradeUtility.zip`

Important This utility should be run on the machine where Agile PLM 9.2.2.1 is installed.

To run the PPM Post Upgrade Utility:

- Unzip the utility files to a temporary directory.
- Change to the directory where you have unzipped the files and locate the `upgrade.properties` file.
- Edit the following entries in the `upgrade.properties` file to match your environment:

Server Settings	
<code>server.url</code>	URL of the Agile PLM 9.2.2.1 application The format is <code><protocol>://<machine_name>/<application_name></code> . On OAS, the protocol should be <code>ormi</code> . On WebLogic, the protocol should be <code>t3</code> .
<code>server.login.id</code>	Login ID of the Agile user who has PPM-related privileges to run the utility, typically the admin user.
<code>server.login.password</code>	Password of the Agile user.
<code>pe.weekend.days</code>	Weekends configured in the server. This value should be the same as the setting in the <code>agile.properties</code> files.
Database Settings	
<code>db.url</code>	JDBC this driver URL of the database. The format is <code>jdbc.oracle:thin@<db_machine_name>:<port>:<instance_name></code>
<code>db.username</code>	Agile database username
<code>db.password</code>	Agile database password
Application Server Settings	
<code>agile.dir</code>	The parent directory where the library files for the Agile application are located.
<code>oc4j.dir</code>	Location of the Oracle Application Server, if installed.
<code>wls.dir</code>	Location of the BEA WebLogic Application Server, if installed.

- Verify that the Agile PLM 9.2.2.1 application is running.
- On a command line, make sure that the `JAVA_HOME` environment variable points to the location of the JDK. If it does not, set the value to the correct location.
- In the directory where you unzipped the utility files, run `install.cmd` to start the utility.

Important If you configured the PPM Post Upgrade Utility in Agile PLM 9.2.2 and are upgrading to

Agile PLM 9.2.2.1, run install upgrade-actualtime.cmd, NOT install.cmd to start the utility.

11. Restart the Agile application server.

Installing and Configuring Agile Java Client

This chapter includes the following:

▪ Agile Java Client Requirements.....	85
▪ Installing the Agile Java Client.....	85
▪ Reconfiguring Java Client JNLP Files	86
▪ Opening Multiple Java Clients	88

Agile Java Client Requirements

All users need to install JRE 5.0 to use Agile Java Client. JRE 5.0 is available at:

http://java.sun.com/javase/downloads/index_jdk5.jsp
(http://java.sun.com/javase/downloads/index_jdk5.jsp)

The server-side deployment files for Agile Java Client are installed with the Agile Application Server.

Note	The Agile PLM administrator must send users the URL to connect to the Agile Java Client.
------	--

Installing the Agile Java Client

To use the Agile Java Client, you must install it on your client computer. Agile Java Client uses Java Web Start technology to download the software and keep it updated.

To install the Agile Java Client:

1. Open your browser and type the following:
`http://Web Server.<domain>:<port>/JavaClient/start.html`
For example, the URL might look something like this:
`http://plmserver.mycompany.com/JavaClient/start.html`
2. Click Launch.
Java Web Start proceeds to download Java Client files and install them on your computer. This may take a few minutes.
3. If a Security Warning dialog box appears, click Start.
4. If the Agile 9.2.2.1 Desktop Integration dialog box appears, click Yes to integrate the Agile Java Client with your desktop.
You are prompted to log in to the Agile server.
5. Enter your Agile PLM username and password, and then Click OK.

The main Agile Java Client window opens.

Running Agile Java Client 9.0 and Agile Java Client 9.2.2.1 on the Same Computer

Agile Java Client 9.0 and Agile Java Client 9.2.2.1 require different versions of the Java Runtime Environment (JRE). Agile Java Client 9.0 requires JRE 1.4.2, whereas Agile Java Client 9.2.2.1 requires JRE 5.0.

If you have both JRE 1.4.2 and JRE 5.0 installed on the same computer, you need to configure the Agile 9.0 application in Java Web Start to disable JRE 5.0. Otherwise, you will experience problems. For example, you won't be able to add files to the Attachments tab of an object.

To force Agile Java Client 9.0 to use JRE 1.4.2:

1. Go to the directory where JRE 1.4.2 is installed (such as D:\Program Files\Java\j2re1.4.2_09), and open the javaws subfolder.
2. Run Java Web Start (javaws.exe).
3. Choose View > Downloaded Applications.
4. Select the Agile 9.0 application.
5. Choose File > Preferences.
6. Click the Java tab.
7. In the Platform Version column, select 1.5. Make sure the Enabled checkbox is unchecked.
8. Click OK.

Reconfiguring Java Client JNLP Files

When you install the Agile Application Server, the following two JNLP files are configured for the Agile Java Client. These files are embedded with the application.ear file and deployed with the application:

- pcclient.jnlp
- ext.jnlp

A JNLP file is an XML document that describes a Java application to be launched by Java Web Start. Ordinarily, the JNLP files are configured correctly during installation of Agile PLM. However, if you have an application server cluster and are unable to start Java Client and download its classes, you may need to reconfigure the JNLP files to point to the right servers.

Modifying the JNLP Files

In the agile_home\install\bin folder, Agile provides two utilities for unpacking the JNLP files from the application.ear file and repacking them again after you've modified them:

Windows Scripts	UNIX Scripts
ExtractJNLPFiles.cmd	ExtractJNLPFiles.sh

Windows Scripts	UNIX Scripts
RepackJNLPPFiles.cmd	RepackJNLPPFiles.sh

To extract and modify the Java Client JNLP files:

1. Stop the Web proxy server or load balancer.
2. Stop the Agile Application Server.
3. On the application server computer, open a command prompt window.
4. Run the ExtractJNLPPFiles script to extract the JNLP files from the application.ear file.

`\agile_home\install\bin\ExtractJNLPPFiles`

Important If you have a WebLogic Server cluster, extract the JNLP files only on the Administration Server. When you redeploy the Agile application, the updated JNLP files will be propagated to all servers in the cluster.

5. Open the pcclient.jnlp file in a text editor. The file is located in the `agile_home\agileDomain\applications` folder.
6. Find the following tags and edit the values listed below in blue:

jnlp:

`<jnlp spec="1.0+" codebase="http://<proxy/loadbalancer>.<domain>:<port>/JavaClient">`

serverURL:

`<argument>serverURL=<protocol>://<appserver>.<domain>:<port>/`

`<appserver_virtual_path></argument>`

webserverName:

`<argument>webserverName=<proxy/loadbalancer>.<domain>:<port></argument>`

where

- `<protocol>` is the protocol used by the application server. Enter t3 for BEA WebLogic Server and ormi for Oracle Application Server.
- `<proxy/loadbalancer>` is the Web proxy server hostname or the alias for the load balancer
- `<domain>` is the fully qualified domain name
- `<port>` is the Web proxy server port or virtual port for the load balancer.
- `<appserver_virtual_path>` is the Agile Application Server virtual path. The default is "Agile".

7. Save the file.
8. Open the ext.jnlp file in a text editor. The file is located in an OAS or WebLogic subfolder beneath the `agile_home\agileDomain\applications` folder.
9. Find the following tag and edit the values listed below in blue:

jnlp:

`<jnlp spec="1.0+" codebase="http://<proxy/loadbalancer>.<domain>:<port>/JavaClient">`

where

- `<proxy/loadbalancer>` is the Web proxy server hostname or the alias for the load balancer

- *<domain>* is the fully qualified domain name
 - *<port>* is the Web proxy server port or virtual port for the load balancer.
10. Save the file.
 11. Run the RepackJNLPPFiles script to repack the JNLP files into the application.ear file.
`\agile_home\install\bin\RepackJNLPPFiles`
 12. Start the Agile Application Server.
 13. Start the Web proxy server or load balancer.
 14. Start the Web proxy server or load balancer.

Opening Multiple Java Clients

If you wish to have the ability to open multiple Java Clients on one machine, perform the following steps before deploying Agile PLM 9.2.2.1 on your application server:

Important Back up the application.ear file before proceeding.

15. On the application server computer, open a command prompt window.
16. Run the ExtractJNLPPFiles script to extract the JNLP files from the application.ear file.
`\agile_home\install\bin\ExtractJNLPPFiles`

Important If you have an OAS cluster, extract the JNLP files only on the Repository Host Server. When you redeploy the Agile application, the updated JNLP files will be propagated to all servers in the cluster.

17. Open the pcclient.jnlp file in a text editor. The file is located in the agile_home\agileDomain\applications folder.
18. Find the following tag:
application-desc main-class:
`<application-desc main-class="com.agile.ui.pcclient.PCClient">`
19. Add the following tag to this class:
`<argument>singleSession=no</argument>`
20. Save the file.
21. Run the RepackJNLPPFiles script to repack the JNLP files into the application.ear file.
`\agile_home\install\bin\RepackJNLPPFiles`

Configuring Agile Product Interchange

This chapter includes the following:

▪ Overview.....	89
▪ Configuring the Apache Tomcat Service	90
▪ Testing the Installation.....	91
▪ Using the Agile Product Interchange DataLoad Utility	91

Important When you install and configure the Agile Product Interchange, follow the sequence recommended in “Product Interchange Installation Checklist”

Overview

Agile Product Interchange™, which is part of the Agile Content Framework, enables users to rapidly identify any structural or parts-related issues in BOMs and AMLs and resolve these issues in a systematic fashion. It automates product record handoffs and the refresh of AML records by leveraging real-time links to source component intelligence dispersed throughout the supply chain. Customers can ensure that product content is synchronized with component events occurring in the supply chain, and they benefit from clean, accurate product records across all PLM processes.

Agile Product Interchange has both database and application components. This chapter describes how to configure only the Agile Product Interchange application.

Note	For information about Agile Product Interchange database installation, see the <i>Agile PLM Database Installation Guide</i> .
------	---

Requirements

For Agile Product Interchange hardware and software requirements, see the *Agile PLM Capacity Planning and Deployment Guide*.

To use the Product Interchange DataLoad utility, Microsoft Excel should be installed on the same computer as the Product Interchange application.

Note	DO NOT install Agile Product Interchange on the same machine as the Agile PLM application server. Agile Product Interchange is a database-intensive application and can severely impact the performance of the Agile PLM application server if they are installed on the same machine.
------	--

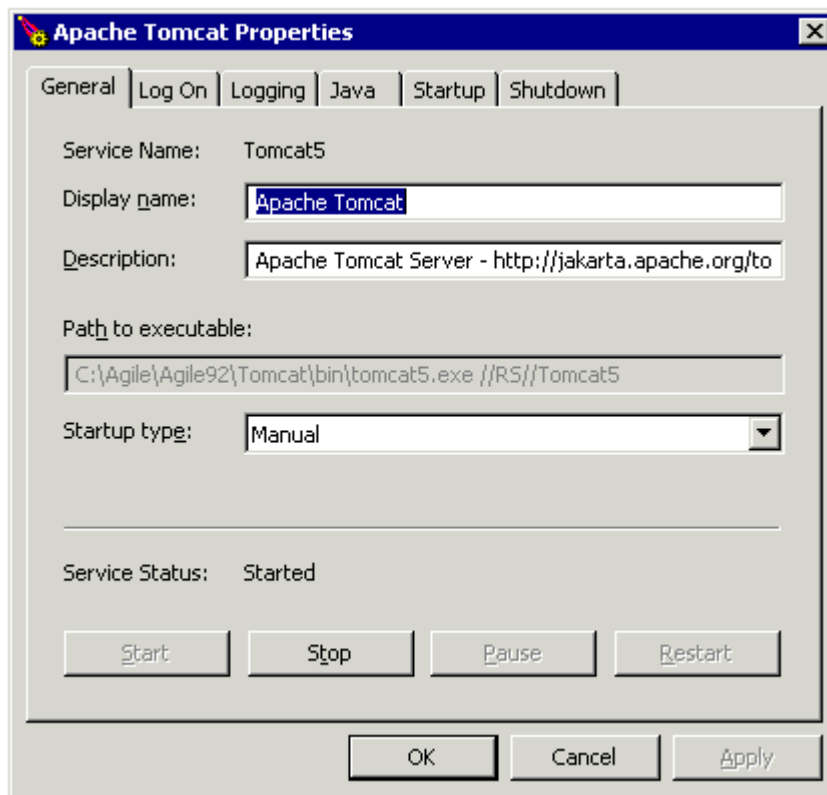
Configuring the Apache Tomcat Service

Agile Product Interchange uses the Apache Tomcat server, which is installed as a Windows service. Before starting the Apache Tomcat service, you must configure it for Agile Product Interchange.

To configure the Apache Tomcat service for Agile Product Interchange:

1. Choose **Start > All Programs > Apache Tomcat 5.0 > Configure Tomcat**.

The Apache Tomcat Properties dialog box appears.



2. On the General tab, make sure the Startup Type option is set to Automatic. This ensures that the Apache Tomcat service will start automatically when you restart the server.
3. Click the Java tab.
4. Make sure the Java Virtual Machine and Java Classpath options point to the location for Java Development Kit (JDK) 1.4.2.

Note JDK 1.4.2 is installed automatically with Agile Product Interchange and is located in the \agile_home\jdk folder.

5. In the Java Options box, remove the entry for java.endorsed.dirs. The complete entry to remove looks like this:

-Djava.endorsed.dirs=D:\Agile\Agile922\Tomcat\common\endorsed

6. Set the Initial Memory Pool size to 512 (MB).
7. Set the Maximum Memory Pool size to 1024 (MB).
8. Click the Logging tab.
9. By default, Apache Tomcat saves stdout and stderr log files in the agile_home\Tomcat\logs folder. These files are excellent resources for troubleshooting errors. Optionally, you can change the location of these files and their filenames by modifying the Log Path, Redirect Stdout, and Redirect Stderr options.
10. Click the General tab again.
11. Toward the bottom of the tab, Service Status indicates whether the Apache Tomcat service is started. If Service Status is “Started,” click Stop to stop the service.
12. Click Start to restart the service.
13. Click OK to close the Apache Tomcat Properties dialog box.

Testing the Installation

After the Agile Product Interchange application has been installed and the Apache Tomcat service has been started, open a browser window and test the installation by going to the following URL:

`https://<Agile-PI-Host-Name>:<SSL-Port>/orexec/SignInRequest.fma?orgId=1`

where

<Agile-PI-Host-Name> is the fully qualified domain name of the machine where the Agile Product Interchange application is installed

<SSL-Port> is the Secure Sockets Layer (SSL) port that Tomcat listens to. If you are using the default SSL port (443), you can omit the SSL port from the URL.

Here are examples of URLs you might type:

`https://piserver.mycompany.com:8443/orexec/SignInRequest.fma?orgId=1`

`https://piserver.mycompany.com/orexec/SignInRequest.fma?orgId=1`

Use the following username/password logins to verify the installation:

- admin/agile
- agileuser1/agile

Using the Agile Product Interchange DataLoad Utility

This section describes how to use the Agile Product Interchange DataLoad utility to load customer data for manufacturer aliases (internal and external), part aliases, and manufacturer codes.

Unpacking and Configuring the Agile Product Interchange DataLoad Utility

The Agile Product Interchange DataLoad utility (pidataload.zip) is installed into the following folder

on your Agile Product Interchange application machine:

agile_home\AgilePI\pidataload

To extract and configure the Agile Product Interchange DataLoad utility:

1. In the pidataload folder, open pidataload.zip using WinZip or another archive utility. Extract the contents of the file to the same folder.
2. Edit the database details in the config.properties file found in the following folder:

agile_home\AgilePI\pidataload\config

For guidelines on how to edit the config.properties file, read instructions in the file.

Data File Formats

Before loading data into Agile Product Interchange using the DataLoad utility, make sure your Microsoft Excel data files conform to the proper format.

Internal Manufacturer Alias Format

The Microsoft Excel file used for internal manufacturer aliases should have the following format:

- Column A should contain internal standard manufacturers.
- Column B should contain aliases.
- The first row of the file should be the header.

The following table shows the format for an internal manufacturer alias file.

Internal Standard Mfr	Alias Mfr
PANASONIC	PANASONIC CORP
PANASONIC	PANASONIC INC
PANASONIC	PANASONIC LTD
MICROSEMI	MICROSEMI DIV
MICROSEMI	MICROSEMI INC

External Manufacturer Alias Format

The Microsoft Excel file used for external manufacturer aliases should have the following format:

- Column A should contain standard manufacturers.
- Column B should contain DataSource manufacturer aliases.
- The first row of the file should be the header.

The following table shows the format for an external manufacturer alias file.

Internal Standard Mfr	PartMiner Mfr
3M PRODUCTS	3M INTERCONNECT SOLUTIONS
AAVID THERMAL PRODUCTS	AAVID THERMALLOY
ADVANCED POWER SOLUTIONS	ADVANCED POWER TECHNOLOGY
AGERE	AGERE SYSTEMS

Manufacturer Part Number Alias Format

The Microsoft Excel file used for manufacturer part number aliases should have the following format:

- Column A should contain the dirty manufacturers.
- Column B should contain the dirty parts.
- Column C should contain the clean manufacturers.
- Column D should contain the clean parts.
- The first row of the file should be the header.

The following table shows the format for an manufacturer part number alias file.

Dirty Mfr	Dirty Part	Clean Mfr	Clean Part
3M	152244-0113GG	3M INTERCONNECT SOLUTIONS	1522440113GG
3M	2304-6111TG	3M INTERCONNECT SOLUTIONS	23046111TG
3M	2402-6112TB	3M INTERCONNECT SOLUTIONS	24026112TB

Manufacturer Code Format

The Microsoft Excel file used for manufacturer codes should have the following format:

- Column A should contain the manufacturer name.
- Column B should contain the manufacturer code.
- The first row of the file should be the header.

The following table shows the format for a manufacturer code file.

Mfr Name	Mfr Code
3L ELECTRONIC CORP	7095
NETERGY MICROELECTRONICS	2018
8 X 8 INC	4659

Commodity Code Format

The Microsoft Excel file used for commodity codes should have the following format:

- Column A should contain the internal commodity code.
- Column B should contain the description of the commodity.
- Column C should contain the corresponding PartMiner Commodity Code.
- The first row of the file should be the header.

The following table shows the format for a commodity code file.

Internal Commodity Code	Description	PartMiner Commodity Code
06370	IC,MEMORY,EPROM	4420
06400	IC,PROC	3780
06500	IC,ANALOG	3690

Loading Manufacturer Aliases

Use the runMfrAliasLoader.bat script to load manufacturer aliases into your system.

To load manufacturer aliases from an internal data source:

1. Open a Command Prompt window.
2. Change directories to the agile_home\AgilePI\pidataload directory.
3. Run a script called runMfrAliasLoader.bat using the following syntax:
runMfrAliasLoader <MfrAliases_Datafile_Path> <Config_File_Path>

where

<MfrAliases_Datafile_Path> is the path to the internal manufacturer alias data file.

<Config_File_Path> is the path to the config.properties file for the Agile Product Interchange DataLoad utility.

For example:

```
runMfrAliasLoader.bat "d:\Agile\Agile9221\AgilePI\pidataload\files\InternalAliasesData.xls"  
"d:\Agile\Agile9221\AgilePI\pidataload\config\config.properties"
```

To load manufacturer aliases from an external data source:

1. Open a Command Prompt window.
2. Change directories to the agile_home\AgilePI\pidataload directory.
3. Run a script called runMfrAliasLoader.bat using the following syntax:


```
runMfrAliasLoader <MfrAliases_Datafile_Path> <DataSource_Org_Name> <Config_File_Path>
```

where

<MfrAliases_Datafile_Path> is the path to the external manufacturer alias data file.

<DataSource_Org_Name> is the data source organization name exactly as configured in Agile Product Interchange.

Note You can see the list of Organizations in Agile Product Interchange. Log in as admin and create a new Data Source Profile.

<Config_File_Path> is the path to the config.properties file for the Agile Product Interchange DataLoad utility.

For example:

```
runMfrAliasLoader.bat "d:\Agile\Agile9221\AgilePI\pidataLoad\files\ExternalAliasesData.xls"  
"PartMiner"
```

```
"d:\Agile\Agile9221\AgilePI\pidataLoad\config\config.properties"
```

Loading Manufacturer Part Number Aliases

Use the runMpnAliasLoader.bat script to load manufacturer part number aliases into your system.

To load manufacturer part number aliases:

1. Open a Command Prompt window.
2. Change directories to the agile_home\AgilePI\pidataload directory.
3. Run a script called runMpnAliasLoader.bat using the following syntax:

```
runMpnAliasLoader <MpnAliases_Datafile_Path> <DataSource_Profile_Name>  
<Config_File_Path>
```

where

<MpnAliases_Datafile_Path> is the path to the manufacturer part number alias data file.

<DataSource_Profile_Name> is the data source profile name exactly as configured in Agile Product Interchange.

Note A valid data source profile is one of the data source profile names that you get as result when you search for all Data Source Profiles in Agile Product Interchange.

<Config_File_Path> is the path to the config.properties file for the Agile Product Interchange DataLoad utility.

For example:

```
runMpnAliasLoader.bat "d:\Agile\Agile9221\AgilePI\pidataLoad\files\mpndl.xls" "PartMiner"  
"d:\Agile\Agile9221\AgilePI\pidataLoad\config\config.properties"
```

Loading Manufacturer Codes

Use the runMfrCodesLoader.bat script to load manufacturer codes into your system.

To load manufacturer codes:

1. Open a Command Prompt window.
2. Change directories to the agile_home\AgilePI\pidataload directory.
3. Run a script called runMfrCodesLoader.bat using the following syntax:
runMfrCodesLoader <MfrCodes_Datafile_Path> <Config_File_Path>

where

<MfrCodes_Datafile_Path> is the path to the manufacturer codes data file.

<Config_File_Path> is the path to the config.properties file for the Agile Product Interchange DataLoad utility.

For example:

```
runMfrCodesLoader.bat "d:\Agile\Agile9221\AgilePI\pidataload\files\mfrcodes.xls"  
"d:\Agile\Agile9221\AgilePI\pidataload\config\config.properties"
```

Loading Commodity Codes

Use the runCommodityDetails.bat script to load commodity codes into your system.

To load commodity codes:

1. Open a Command Prompt window.
2. Change directories to the agile_home\AgilePI\pidataload directory.
3. Run a script called runCommodityDetails.bat using the following syntax:
runCommodityDetails <CommodityCodes_Datafile_Path> <Config_File_Path>

where

<CommodityCodes_Datafile_Path> is the path to the commodity codes data file.

<Config_File_Path> is the path to the config.properties file for the Agile Product Interchange DataLoad utility.

For example:

```
runCommodityDetails.bat "d:\Agile\Agile9221\AgilePI\pidataload\files\commoditycodes.xls"  
"d:\Agile\Agile9221\AgilePI\pidataload\config\config.properties"
```

Getting Aliases for Manufacturers and Manufacturer Parts

Use the following scripts to create output files containing the aliases for manufacturers and manufacturer parts from your system:

- runInternalMfrAliasesGetter.bat
- runExternalMfrAliasesGetter.bat

□ `runMpnAliasGetter.bat`

To get manufacturer aliases for an internal data source:

1. Open a Command Prompt window.
2. Change directories to the `agile_home\AgilePI\pidataload` directory.
3. Run a script called `runInternalMfrAliasesGetter.bat` using the following syntax:

```
runInternalMfrAliasesGetter <Output_File> <Config_File_Path>
```

where

<Output_File> is the path to the output file that the script generates.

<Config_File_Path> is the path to the `config.properties` file for the Agile Product Interchange DataLoad utility.

For example:

```
runInternalMfrAliasesGetter.bat
```

```
"d:\Agile\Agile9221\AgilePI\pidataLoad\aliasFiles\InternalMfrAliases.txt"
```

```
"d:\Agile\Agile9221\AgilePI\pidataLoad\config\config.properties"
```

To get manufacturer aliases for external data sources:

1. Open a Command Prompt window.
2. Change directories to the `agile_home\AgilePI\pidataload` directory.
3. Run a script called `runExternalMfrAliasesGetter.bat` using the following syntax:

```
runExternalMfrAliasesGetter <Output_File> <Config_File_Path>
```

where

<Output_File> is the path to the output file that the script generates.

<Config_File_Path> is the path to the `config.properties` file for the Agile Product Interchange DataLoad utility.

For example:

```
runExternalMfrAliasesGetter.bat
```

```
"d:\Agile\Agile9221\AgilePI\pidataLoad\aliasFiles\ExternalMfrAliases.txt"
```

```
"d:\Agile\Agile9221\AgilePI\pidataLoad\config\config.properties"
```

To get the mapping table for manufacturer part aliases:

1. Open a Command Prompt window.
2. Change directories to the `agile_home\AgilePI\pidataload` directory.
3. Run a script called `runMpnAliasGetter.bat` using the following syntax:

```
runMpnAliasGetter <Output_File> <Config_File_Path>
```

where

<Output_File> is the path to the output file that the script generates.

<Config_File_Path> is the path to the config.properties file for the Agile Product Interchange DataLoad utility.

For example:

runMpnAliasGetter

"d:\Agile\Agile9221\AgilePI\pidataLoad\aliasFiles\PartAliases.txt"

"d:\Agile\Agile9221\AgilePI\pidataLoad\config\config.properties"

Agile PLM Installer Panels

This Appendix includes the following:

▪ Common Agile PLM Installer Panels	99
▪ Database Server Panels.....	100
▪ Application Server Panels.....	101
▪ Web Server Panels.....	102
▪ Viewer Panels.....	103
▪ File Manager Panels.....	103
▪ Directory Server Panels.....	105
▪ Product InterChange Panels.....	105

Common Agile PLM Installer Panels

The following Agile PLM installer panels are common to all components:

Panel	Step(s) to Perform
Welcome	Click Next.
License Agreement	Read the Agile PLM license agreement, and then select I accept the terms of the license agreement .
Customer Information	Enter your user name, company name, and license key. Your license key determines which Agile PLM components can be installed.
Choose Install Component(s)	Select the components to install. The list of components depends on the license key that you entered in the previous panel. When you select each component, a description of it appears in the Description box. Important If a component that you would like to install does not appear in the list, you have entered the wrong license key in the Customer Information panel. Do not click Previous to try to correct the license key. Instead, exit from the installer, obtain the correct license key from Agile, and then restart the installer. Enter the correct license key when prompted.
Installation Location	Enter the directory where you want to install Agile PLM components. This directory is also referred to as the Agile Home.
Choose Shortcut Folder	Depending on your operating system, select where you would like to create links or product icons for Agile PLM. These shortcuts allow you to quickly launch Agile PLM programs. Windows users: To create Agile PLM icons for all users, make sure the Create Icons for All Users box is checked.

Panel	Step(s) to Perform
Pre-Installation Summary	<p>Review the information you provided in previous panels to make sure it's correct before you install.</p> <p>If the information is correct, click Install. If you need to make any changes, click Previous to go to a previous panel.</p>
Install Complete	<p>You have finished Agile PLM installation.</p> <p>Click Done to close the installer.</p> <p>Windows users: Depending on the components you installed, your computer may restart when you click Done.</p>

Database Server Panels

The following Agile PLM installer panels appear when you install the Database Server:

Panel	Step(s) to Perform
Create Product Interchange Database Schema	<p>To create a Product Interchange database schema in addition to the Agile PLM database schema, make sure the Create Product Interchange Database Schema box is checked. Otherwise, leave the box unchecked to create only an Agile PLM database schema.</p>
Agile PLM Database Details	<p>Enter your Agile PLM database information. If you do not know these values, see the database administrator responsible for your Agile PLM database server.</p> <p>Agile Database Host Name</p> <p>The fully qualified domain name of the computer where the Agile PLM database server is installed.</p> <p>Agile Database Port</p> <p>For Oracle, the default database port is 1521.</p> <p>Agile Database SID</p> <p>Enter the Oracle System Identifier that refers to the instance of the Oracle database running on the server. The default SID is agile9.</p> <p>Agile Database User</p> <p>Enter the database user. The default user is agile.</p> <p>Agile Database User Password</p> <p>Enter the password for the Agile PLM database user. The default password is tartan.</p> <hr/> <p>Note If your Agile PLM database is configured to use different values than the defaults listed above, specify that information instead.</p> <hr/>

Panel	Step(s) to Perform
Oracle Database Version	<p>Select the version of your Oracle database server. Agile supports the following Oracle versions:</p> <ul style="list-style-type: none"> ▫ Oracle 9i R2 Database Server ▫ Oracle 10g Database Server

Application Server Panels

The following Agile PLM installer panels appear when you install the Application Server:

Panel	Step(s) to Perform
Application Server Type	<p>Select the type of application server you are using. Agile PLM supports Oracle Application Server 10g (10.1.2.0.2) and BEA WebLogic Server 8.1 SP6.</p> <p>Important The application server you select should be installed BEFORE you install Agile PLM.</p>
Installation Type	<p>Select Standalone Installation or Cluster Installation.</p> <hr/> <p>Note If you are installing Application Server and File Manager on the same computer, selecting Cluster Installation will cause both to be clustered. A standalone installation requires only a single server, and therefore is not as scalable or as reliable.</p> <hr/> <p>A cluster is a group of servers that work together to provide a more scalable, more reliable application platform than a single server. A cluster appears to its clients as a single server, but is actually a group of servers acting as one. A cluster provides two key advantages over a single server:</p> <ul style="list-style-type: none"> ▫ Scalability: The capacity of a cluster is not limited to a single server or a single machine. New servers can be added to the cluster dynamically to increase capacity. If more hardware is needed, a new server on a new machine can be added. ▫ High-Availability: A cluster uses the redundancy of multiple servers to insulate clients from failures. The same service can be provided on multiple servers in the cluster. If one server fails, another can take over. The ability to fail over from a failed server to a functioning server increases the availability of the application to clients.

Panel	Step(s) to Perform
Oracle Application Server Home	<p>Enter the directory where Oracle Application Server is installed, or where you plan to install it. This directory is also referred to as the Oracle Home.</p> <p>Important If you are installing an Oracle Application Server cluster, all servers in the cluster must use a like operating system.</p>
Oracle Application Server Information	<p>Enter details for your Oracle Application Server installation.</p> <p>OAS Home Name Enter the OAS home name (not the directory location).</p> <p>IAS Instance Name Enter the OracleAS 10g instance name (for example, oas).</p> <p>IAS Admin Password Enter the password for the OracleAS 10g administration user, ias_admin. It must be at least five characters and it must contain one number.</p>
Oracle Application Server 10g Setup Path	<p>Enter the path where the Oracle Application Server 10g installation program is located. Click Choose to browse to the path.</p>
Application Server Information	<p>Enter the Application Server information.</p> <p>Host Name Enter the fully qualified domain name of the Application Server.</p> <p>Note For Non-repository cluster installations, Host name should be pointing to your Repository server.</p>

Web Server Panels

The following Agile PLM installer panels appear when you install Agile Proxies:

Panel	Step(s) to Perform
Apache Home Directory	<p>Enter the Apache Web Server home directory.</p> <p>You can click Choose to browse to the Apache home directory.</p> <p>Note If you are installing Agile PLM on Oracle Application Server (OAS), DON'T select the home directory for Oracle HTTP Server, a version of Apache Web Server that is included with OAS.</p>

Panel	Step(s) to Perform
Web Server Information	<p>Enter information for the Web server used to proxy Agile PLM. If you are using a load balancer, specify the alias and virtual port for it instead.</p> <p>Host Name</p> <p>Enter the fully qualified domain name (for example, computer-name.company.com) of the Web server. If you are using a load balancer, specify the alias for the load balancer virtual IP address.</p> <p>Port Number</p> <p>Enter the HTTP or HTTPS port used by the Web server. General Web access is typically available on port 80, but your company may use a different port. If you are using a load balancer, specify the virtual port number of the load balancer.</p>

Viewer Panels

The following Agile PLM installer panel appears when you install the Application Server and File Manager:

Panel	Step(s) to Perform
Agile Viewer	<p>Enter Agile Viewer information.</p> <p>Host Name</p> <p>Enter the fully qualified domain name (for example, computer-name.company.com) of the Viewer.</p> <p>Port Number</p> <p>Enter the port used by the Viewer. The default port is 5099, but your company may use a different port if 5099 is not available.</p>

File Manager Panels

The following Agile PLM installer panels appear when you install File Manager:

Panel	Step(s) to Perform
File Manager User Authentication	<p>A user account is used by the File Manager to communicate with the Application Server and its peers. You can use the default internal account or create a separate user account.</p> <p>Choose the type of user account you want to use for authentication.</p>
File Manager User Account	<p>The File Manager user account is used by the File Manager to communicate with the Application Server and its peers. The default user account is ifuser.</p> <p>File Manager User Name</p> <p>Enter the user account used to communicate with the Application Server.</p> <p>File Manager User Password</p> <p>Enter the File Manager user password.</p>
File Manager Storage Location	<p>Enter the directory where the File Manager files are stored. Click Choose to browse to the path.</p> <hr/> <p>Note Make sure the directory you specify is one to which you have write access. For clustered File Managers, you must specify a network location.</p> <hr/>
File Manager Virtual Path	<p>Enter the virtual path used to connect to the Agile File Manager. The default virtual path is "Filemgr", but you can change it to something appropriate for your company.</p> <p>The complete path for your Agile File Manager will be http://<web_server>:<port>/<file_manager_virtual_path>/AttachmentServlet.</p> <p>Important: The virtual path for Agile File Manager should be different from the virtual path for the Agile Application Server, especially if they use the same proxy server. The virtual paths should also have a different prefix. For example, if the Agile Application Server Virtual Path is "Agile", the name of the Agile File Manager Virtual Path must start with something other than "Agile".</p>
Agile File Manager	<p>Enter the machine name where File Manager is installed as well as the port number.</p> <p>Agile File Manager Host Name</p> <p>Enter the fully qualified domain name of the machine where you are installing the File Manager.</p> <p>Agile File Manager Port Number</p> <p>Enter the port number on which other Agile PLM applications will connect to the File Manager. The default port is 8080.</p> <p>If the File Manager is accessed through a proxy server or load balancer, enter the host name and port number of that machine.</p>

Panel	Step(s) to Perform
Application Server Virtual Path	<p>Enter the virtual path used to connect to the Agile Application Server. The default virtual path is "Agile", but you can change it to something appropriate for your company.</p> <p>The complete path for your Agile Application Server will be http://<web_server>:<port>/<appserver_virtual_path>/PLMServlet.</p> <p>The virtual path for Agile Application Server should be different from the virtual path for the Agile File Manager, especially if they use the same proxy server.</p>

Directory Server Panels

The following Agile PLM installer panels appear when you choose to authenticate users through a Directory Server:

Panel	Step(s) to Perform
Directory Server	<p>Choose whether to use a Directory Server or the Agile PLM database for authentication.</p> <p>You can integrate Agile PLM with your company's existing Directory Server to manage your users in one place. After installation is complete, you must use the Agile Java Client to configure the Directory Server for Agile PLM. For instructions on how to configure the directory server, see the <i>Agile PLM Administrator Guide</i>.</p> <p>If your company does not have a Directory Server currently implemented, select No, use a Database for authentication.</p>

Product InterChange Panels

The following Agile PLM installer panels appear when you install Product InterChange:

Panel	Step(s) to Perform
Tomcat Listen Ports	<p>Specify the Tomcat listen ports.</p> <p>Tomcat Listen Port (non-SSL)</p> <p>Enter the Tomcat listen port. The default port is 8080.</p> <p>Tomcat Secure Listen Port (SSL)</p> <p>Enter the Tomcat secure listen port. The default port is 8443. You may also use the industry standard SSL port 443 if it is available.</p> <hr/> <p>Note You should accept the default ports unless you know they are unavailable.</p> <hr/>
SMTP Information	<p>Enter the SMTP server information that Product InterChange uses. SMTP is short for Simple Mail Transfer Protocol, a protocol for sending e-mail messages between servers.</p> <p>The Product InterChange application uses this information email any exceptions that it encounters in its Web Controller. Product InterChange must be able to send both internal and external email from this host. Otherwise, the application will fail.</p> <p>SMTP Server Name</p> <p>Enter the fully qualified domain name of the SMTP server name.</p> <p>Email Address</p> <p>Enter the email address of the Product InterChange administrator.</p>

Agile Application Server Scripts

This Appendix includes the following:

- Installation and Configuration Scripts 107
- Application Scripts 108
- File Vault Utilities 108

Installation and Configuration Scripts

Agile provides several scripts that can be used during installation and configuration of the Agile Application Server. The scripts are installed into the agile_home\install\bin directory:

Windows Script	UNIX Script	Description
ExtractArchive.cmd	ExtractArchive.sh	Unpacks all of the files in the Agile application.ear file.
ExtractConfigFiles.cmd	ExtractConfigFiles.sh	Extracts configuration files from the Agile application.ear file.
ExtractJavaClient-Files.cmd	ExtractJavaClient-Files.sh	Unpacks all of the Java Client files from the Agile application.ear file.
ExtractJNLPPFiles.cmd	ExtractJNLPPFiles.sh	Extracts JNLP files for Java Client from the Agile application.ear file. A JNLP file is an XML document that describes a Java application to be launched by Java Web Start. To successfully download and install Java Client using Java Web Start, you must configure the JNLP MIME type for your server.
GetInstanceName.cmd	GetInstanceName.sh	Gets the instance name in a cluster for Oracle Application Server 10g.
GetRepository.cmd	GetRepository.sh	Gets the Repository Host ID from a cluster for Oracle Application Server 10g.
RepackArchive.cmd	RepackArchive.sh	Repacks all of the files into the Agile application.ear file. After you run this script, you are ready to redeploy the Agile application.
RepackConfigFiles.cmd	RepackConfigFiles.sh	Repacks configuration files into the Agile application.ear file. After you run this script, you are ready to redeploy the Agile application.
RepackJavaClient-Files.cmd	RepackJavaClient-Files.sh	Repacks all Java Client files into JavaClient.war, and then updates the JavaClient.war file contained in the Agile application.ear file. After you run this script, you are ready to redeploy the Agile application.
RepackJNLPPFiles.cmd	RepackJNLPPFiles.sh	Repacks JNLP files for Java Client into the Agile application.ear file. After you run this script, you are ready to redeploy the Agile application.
RestartEMAgent.cmd	RestartEMAgent.sh	Restarts the Oracle Application Server Control Console.

Windows Script	UNIX Script	Description
RestartOAS.cmd	RestartOAS.sh	Restarts the Oracle Application Server instance and the dcm-daemon process.

Application Scripts

Agile provides several scripts for deploying and starting the Agile application. The scripts are installed into the agile_home\agileDomain\bin directory:

Windows Script	UNIX Script	Description
checkLDAPConfig.cmd	checkLDAPConfig.sh	Tries to connect to the Directory Server and verify whether LDAP configuration is correct.
DeployAgile.cmd	DeployAgile.sh	Deploys the Agile application on Oracle Application Server 10g.
encryptpwd.cmd	encryptpwd.sh	Encrypts a password.
InstallService.cmd	n/a	Installs Agile PLM as a Windows service.
installService-managed-server.cmd	n/a	Installs Agile PLM as a Windows service for a BEA WebLogic Managed Server.
migrateUsersToDB.cmd	migrateUsersToDB.sh	Migrates users from the Directory Server to the Agile PLM database. After you run this script, make sure to restart your application server.
setEnv.cmd	setEnv.sh	Sets common environment variables used to run other Agile scripts.
startAgile.cmd	startAgile.sh	Starts the Agile application on BEA WebLogic Server.
startAgileCluster.cmd	startAgileCluster.sh	Starts the Agile cluster on BEA WebLogic Server.
stopAgile.cmd	stopAgile.sh	Stops the Agile application on BEA WebLogic Server.
uninstallService.cmd	n/a	Uninstalls the Agile PLM service on Windows.

File Vault Utilities

Agile provides several utilities to use with the File Vault. The utilities are installed in the agile_home\agileDomain\tools directory.

iFSReorgV2

Used to restructure the file vault during an upgrade from a version prior to Agile PLM 9.2.1.

Usage: java -jar iFSReorgV2.jar -basedir <value> -oldFilePrefix <value> [-newFilePrefix <value>] [-logging <true/false>] [-simulate <true/false>]

where

- basedir is the file vault location to be reorganized
- oldFilePrefix is the old file name prefix for the existing files in the vault
- newFilePrefix is the new file name prefix. All of the existing files will be renamed with this prefix. This is an optional argument. If it is not specified, the old file name prefix is used.
- logging enables logging of warnings or errors if set to true. The log is saved to a file named ifsReorg.log.
- simulate simulates the reorganization process without actually moving or renaming the files.

MetaFilesRemover

Used to remove metafiles from the file vault based on the last used date or size.

Usage: java -jar MetaFilesRemover.jar [-delete <value>] [-age <value>] [-size <value>] -basedir <value> -prefix <value> -serverURL <value> -username <value> -password <value>

where

- delete deletes the metafiles.
- age specifies the last access time (day).
- size specifies file size (KB).
- basedir is the file vault location where the metafiles are removed.
- prefix is the file name prefix.
- serverURL is the location of the DMS service, for example, <http://server.company.com:80/Agile/services/DmsService>.
- username is the DMS service username.
- password is the DMS service password.

MetaItemGenerator

Used to generate metafiles for a file vault. The utility simulates offline metafile generation from all of the files in the vault.

Usage: java -jar MetaItem.jar -basedir <value> -filePrefix <value> -serverURL <value> -defaultUser <value> -defaultPassword <value> [-logging <true/false>]

where

- basedir is the file vault location where the metafiles are generated.
- filePrefix is the file prefix of the files in the vault.
- serverURL is the URL of the server where the metafiles are persisted.
- defaultUser is the default userid of the Agile system.
- defaultPassword is the password of the default Agile user.
- logging enables logging. All information is saved in the metaltem.log file. By default, logging is disabled.

metaUtility

Used to monitor offline metafile generation status using a graphical user interface.

Usage: java -jar metaUtility.jar

VaultSimulation

Used to create a virtual vault from a database.

Usage: java -jar VaultSimulation.jar -VaultLoc <value> -URL <value> -userid <value> -password <value> [-prefix <value>]

where

- VaultLoc is the file vault location.
- URL is the database location.
- userid is the database userid.
- password is the database password.
- prefix is the file name prefix. The default is Agile.

DeadFilesLocator

Used to locate dead files in a file vault.

Usage: java -jar DeadFilesLocator.jar -attachmentPrefix <value> -vaultRoot <value> [-moveProblemFiles <Y/N>] [-archiveFileDest <value>] [-db_url <value>] [-db_user <value>] [-db_password <value>] [-file <value>] [-VERBOSE <true/false>]

where

- attachmentPrefix is the file name prefix.
- vaultRoot is the absolute path of the vault root.
- moveProblemFiles determines the action for the dead files.
- archiveFileDest is the fully qualified path to an existing directory where you want to move the dead files.

- db_url is the URL of the database.
- db_user is the name of the database user.
- db_password is the password of the database user.
- file is the absolute path to the agile.properties file.

MissingFilesLocator

Used to locate missing files in a file vault.

Usage: java -jar MissingFilesLocator.jar -dburl <value> -dbuserid <value> -dbpassword <value> -ifsuser <value> -ifspassword <value> [-force <value>]

where

- dburl is the URL of the database.
- dbuserid is the name of the database user.
- dbpassword is the password of the database user.
- ifsuser is the name of the file vault user
- ifspassword is the password of the ifs user.
- force forces the utility to continue even if the file server is offline.

FixVault

Corrects the file sizes in the database. The file size is determined based on the actual files in the vault, then corrects the size in the database.

Usage: java -jar FixVaultUtil.jar -n -v -d -h -fileNamePrefix <value> -basedir <value> -db_url <value> -db_user <value> -db_password <value> -file <value>

where

- -n no update
- -v verbose
- -d debug
- -h help
- fileNamePrefix is the prefix of the files in the vault.
- basedir is the file vault location.
- db_url is the URL of the database.

- `db_user` is the name of the database user.
- `db_password` is the password of the database user.
- `file` is the path to the `agile.properties` file.

Agile PLM Service Pack Installation

This Appendix includes the following:

▪ Install and Test Notice	113
▪ Installing an Agile PLM Service Pack on Windows.....	113
▪ Installing an Agile PLM Service Pack on UNIX.....	116
▪ Integrating Agile PLM 9.2.2.x with Agile Viewer 19.x	119

Install and Test Notice

Important Install and test this release on a designated development server before installing it on your production environment. Your development environment should mirror your production environment as closely as possible to provide accurate testing results. It is important to validate the installation of this release, and confirm your integrations are working correctly as part of your minimum due diligence. Any problems or questions noted during your development system testing should be resolved before installing this release on your production environment.

Installing an Agile PLM Service Pack on Windows

Upgrade Requirements

Before you install an Agile PLM service pack, make sure your system meets the following requirements:

Operating System

- Windows 2003 SP1 and later

Supported Application Upgrade Path

The Agile PLM application upgrade paths are from the following releases:

- Agile PLM 9.2.2.1
- All 9.2.2.1 supported Hot Fixes and Service Packs

Upgrading the File Manager

1. If there is no distributed file server network, stop here and go to [Upgrading the Application Server](#). Otherwise, continue with the following steps.

2. Stop the file server and any additional Agile services.
3. Back up the existing deployed application, Filemgr, if present:
 - a. Change to the agile_home\Tomcat\webapps directory.
 - b. Verify there is a directory named Filemgr under the webapps directory.
 - c. If the Filemgr directory exists, then perform the following:

```
cd ..  
mkdir webapps.old  
mv webapps\Filemgr webapps.old
```
4. Download Agile922x_Win.exe to a temporary folder.
5. Download and extract the contents of the 9.2.2.x_Platforms.zip file to the same location as the Agile922x_Win.exe file.
6. In the temporary file, double-click Agile922x_Win.exe.
The Install Window appears.
7. Click Done to finish the installation.

Note If you are using AutoVue, see [Integrating Agile PLM 9.2.2.x with Agile Viewer 19.x](#) (on page 119) for the instructions for your version and platform.

8. Repeat the steps in this section on each distributed file server.

Upgrading the SDK Client

1. If the SDK Client is installed on the same machine as the application server, stop here and go to [Upgrading the Application Server](#). Otherwise, continue with the following steps.
2. On the system where the SDK Client is installed, download Agile922x_Win.exe to a temporary folder.
3. Download and extract the contents of the 9.2.2.x_Platforms.zip file to the same location as the Agile922x_Win.exe file.
4. In the temporary folder, double-click Agile922x_Win.exe.
The Install window appears.
5. Click Done to finish the installation.

Upgrading the Application Server

1. Undeploy the Agile Application:
 - a. Make sure Oracle Application Server is still running.
To check OAS status, open a command prompt window, change to <oas_home>\opmn\bin directory, and run opmnctl status. If OAS isn't running, run opmnctl startall.
 - b. From a command prompt window, change to the agile_home\agileDomain\bin directory.
 - c. Run UnDeployAgile.
2. Stop the OPMN processes from the Oracle home directory:
 - a. Open a command prompt window.
 - b. Stop the Oracle Application Server Control Console:

- \<oas_home>\bin\emctl stop iasconsole
- c. Stop the Oracle Application Server instance:
- \<oas_home>\opmn\bin\opmnctl stopall
3. Verify that the application server, the Apache or IIS Admin Service, and any additional Agile services are stopped.
 4. On the system where the application server is installed, download Agile922x_Win.exe to a temporary folder.
 5. Download and extract the contents of the 9.2.2.x_Platforms.zip file to the same location as the Agile922x_Win.exe file.
 6. In the temporary folder, double-click Agile922x_Win.exe.
The Install window appears.
 7. Click Done to finish the installation.
-
- Note** If you are using AutoVue, see [Integrating Agile PLM 9.2.2.x with Agile Viewer 19.x](#) (on page 119) for the instructions for your version and platform.
-
8. Restart the Oracle Application Server instance:
\<oas_home>\opmn\bin\opmnctl startall
 9. Check the status of the Oracle Application Server instance:
\<oas_home>\opmn\bin\opmnctl status
-
- Note** Make sure the database schema is compatible with Agile PLM 9.2.2.x before starting the application server. See the *Database Upgrade Guide* for the schema version.
-
10. Deploy the Agile application:
\agile_home\agileDomain\bin\DeployAgile.cmd
When deployment is finished, the script prompts that the Agile application has been deployed.
 11. Verify that the Agile application is deployed:
\<oas_home>\dcm\bin\dcmctl listapplications
If Agile is listed, you can log in to the application server.
 12. Start the Apache or IIS Admin Service.
 13. If you are running in a clustered environment, repeat these steps on each application server.

Post-Installation Verification

Application Server

9.2.2.2:

In the application menu under Help | About Agile, Update Versions should contain 9.2.2.2 and Agile Version should contain 9.2.2.2.16.

9.2.2.3:

In the application menu under Help | About Agile, Update Versions should contain 9.2.2.3 and Agile Version should contain 9.2.2.3.09.

File Manager

Start the File Manager before performing the following steps:

1. Type `http://<localhost:8080>/<fileserver_virtual_path>/Configuration` to display the File Manager Configuration page.
2. Confirm all lines show success.

Installing an Agile PLM Service Pack on UNIX

Upgrade Requirements

Before you install an Agile PLM service pack, make sure your system meets the following requirements:

Operating System

- Solaris 9 or 10
- Red Hat Linux 4
- IBM AIX 5.3

Supported Application Upgrade Path

The Agile PLM application upgrade path is from the following release:

- Agile PLM 9.2.2.1
- All 9.2.2.1 supported Hot Fixes and Service Packs

Upgrading the File Manager

1. If there is no distributed file server network, stop here and go to Upgrading the Application Server. Otherwise, continue with the following steps.
2. Stop the file server and any additional Agile processes.

3. Back up the existing deployed application, Filemgr, if present:
 - a. Change to the agile_home/Tomcat/webapps directory.
 - b. Verify there is a directory named Filemgr under the webapps directory.
 - c. If the Filemgr directory exists, then perform the following:

```
cd ..  
mkdir webapps.old  
mv webapps/Filemgr webapps.old
```
4. Download the upgrade file to a temporary directory.
Solaris: Agile922x_Sol.bin
Linux: Agile922x_Lin.bin
AIX: Agile922x_AIX.bin
5. Download and extract the contents of the 9.2.2.x_Platforms.zip file to the same location as the upgrade file.
6. From the temporary directory, run the upgrade file.
The Install Window appears.
7. Click Done to finish the installation.

Note If you are using AutoVue, see [Integrating Agile PLM 9.2.2.x with Agile Viewer 19.x](#) (on page 119) for the instructions for your version and platform.

8. Repeat the steps in this section on each distributed file server.

Upgrading the SDK Client

1. If the SDK Client is installed on the same machine as the application server, stop here and go to Upgrading the Application Server. Otherwise, continue with the following steps.
2. On the system where the SDK Client is installed, download the upgrade file to a temporary directory.
Solaris: Agile922x_Sol.bin
Linux: Agile922x_Lin.bin
AIX: Agile922x_AIX.bin
3. Download and extract the contents of the 9.2.2.x_Platforms.zip file to the same location as the upgrade file.
4. From the temporary directory, run the upgrade file.
The Install window appears.
5. Click Done to finish the installation.

Upgrading the Application Server

1. Undeploy the Agile Application:
 - a. Make sure Oracle Application Server is still running.

To check OAS status, open a command prompt window, change to <oas_home>/opmn/bin directory, and run opmnctl status. If OAS isn't running, run opmnctl startall.
 - b. From a command prompt window, change to the agile_home/agileDomain/bin directory.
 - c. Run UnDeployAgile.sh.
2. Stop the OPMN processes from the Oracle home directory:
 - a. Open a terminal window.
 - b. Stop the Oracle Application Server Control Console:

```
/<oas_home>/bin/emctl stop iasconsole
```
 - c. Stop the Oracle Application Server instance:

```
/<oas_home>/opmn/bin/opmnctl stopall
```
3. Verify that the application server, the Apache web server, and any additional Agile processes are stopped.
4. On the system where the application server is installed, download the upgrade file to a temporary directory.

Solaris: Agile922x_Sol.bin

Linux: Agile922x_Lin.bin

AIX: Agile922x_AIX.bin
5. Download and extract the contents of the 9.2.2.x_Platforms.zip file to the same location as the upgrade file.
6. From the temporary directory, run the upgrade file.

The Install window appears.
7. Click Done to finish the installation.

Note If you are using AutoVue, see [Integrating Agile PLM 9.2.2.x with Agile Viewer 19.x](#) (on page 119) for the instructions for your version and platform.

8. Restart the Oracle Application Server instance:

```
/<oas_home>/opmn/bin/opmnctl startall
```
9. Check the status of the Oracle Application Server instance:

```
/<oas_home>/opmn/bin/opmnctl status
```

Note Make sure the database schema is compatible with Agile PLM 9.2.2.x before starting the application server. See the *Database Upgrade Guide* for the schema version.

10. Deploy the Agile application:

```
/agile_home/agileDomain/bin/DeployAgile.sh
```

When deployment is finished, the script prompts that the Agile application has been deployed.
11. Verify that the Agile application is deployed:


```
/<oas_home>/dcm/bin/dcmctl listapplications
```

If Agile is listed, you can log in to the application server.

12. If the web server is installed on the same machine as the application server, restart the web server.
13. If you are running in a clustered environment, repeat these steps on each application server.

Post-Installation Verification

Application Server

9.2.2.2:

In the application menu under Help | About Agile, Update Versions should contain 9.2.2.2 and Agile Version should contain 9.2.2.2.16.

9.2.2.3:

In the application menu under Help | About Agile, Update Versions should contain 9.2.2.3 and Agile Version should contain 9.2.2.3.09.

File Manager

Start the File Manager before performing the following steps:

1. Type `http://<localhost:8080>/<fileservr_virtual_path>/Configuration` to display the File Manager Configuration page.
2. Confirm all lines show success.

Integrating Agile PLM 9.2.2.x with Agile Viewer 19.x

Follow instructions below for your version of AutoVue and your platform to integrate your 9.2.2.x application servers and File managers with your existing view server installation.

AutoVue 19.2 on Windows with Agile PLM 9.2.2.x on Windows

These steps should occur after completion of the 9.2.2.x Installation and before re-deploying the application.

1. Back up the existing deployed application, Filemgr, if present:
 - a. Change to the `agile_home\Tomcat\webapps` directory.
 - b. Verify there is a directory named Filemgr under the webapps directory.
 - c. If the Filemgr directory exists, then perform the following:
`cd ..`

```
mkdir webapps.old
mv webapps\Filemgr webapps.old
```

2. Run Agile Viewer 19.2 Installer.
3. Accept the license agreement.
4. Enter identity and license code.
5. At the "Choose Install Component(s)" display, deselect "Agile Viewer" and select "Upgrade Viewer 19.2 Client Libraries".
6. Proceed with the Agile Viewer 19.2 installation

AutoVue 19.2 on Windows with Agile PLM 9.2.2.x on UNIX

These steps should occur after completion of the 9.2.2.x Installation and before re-deploying the application.

1. Back up the existing deployed application, Filemgr, if present:
 - a. Change to the agile_home\Tomcat\webapps directory.
 - b. Verify there is a directory named Filemgr under the webapps directory.
 - c. If the Filemgr directory exists, then perform the following:

```
cd ..
mkdir webapps.old
mv webapps\Filemgr webapps.old
```
2. On the application server and file manager machines, copy the platform-specific folder from the Viewer CD to a temporary directory.
3. From the temporary directory, run the setup file for your platform
Solaris: setup_sol.bin
Linux: setup_lin.bin
AIX: setup_aix.bin
The Install window appears.
4. Click Next to proceed through the installer.
5. For information about any screen in the installer, click Help.
6. Click Done to finish the installation.

AutoVue 19.1 Windows and Unix

The following sections provide information to enable you to integrate your previously installed Agile Viewer 19.1 with Agile PLM 9.2.2.x.

Section 1: Configuring the Agile Viewer Profile files

1. Stop the Agile Viewer.
2. From the <Agile9221_Install_Path>\Tools directory, copy the jVue.zip file into a temporary location on the system where the Agile Viewer is Installed.

3. Back up the existing GUI files, located in the <Agile Viewer Home>\AVS\bin directory.
4. Rename the existing Profiles folder to Profiles_orig.

Note Note: If the Agile Viewer has been installed with a 3D License Key then copy 3D Profiles, otherwise copy 2D Profiles.

5. Unpack the jVue.zip file and copy the Profiles folder into <Agile Viewer Home>\bin folder.
6. Start the Agile Viewer.

Section 2: Gather Required Viewer Binaries

1. Copy the html folder from the <AgileHome>\AVS directory on the Viewer system to a temporary location.
2. Rename the folder to jVue.
3. Copy the vueServlet.jar file from the agile_home\AVS\bin directory on the Viewer system to a temporary location.
4. Copy the jVue.jar file from the agile_home\AVS\html directory on the Viewer system to a temporary location.
5. On the system where the File Manager is installed, extract the JVueHelper.class file from the agile_home\agileDomain\applications\webfs.war file to a temporary directory using the following command:

```
jar xvf webfs.war WEB-INF\classes\com\agile\viewer\applet
```
6. Copy the com folder, excluding the WEB-INF\classes path, into the jVue folder. After copying the folder, the path of the JvueHelper.class file should be
\\jVue\com\agile\viewer\applet\JVueHelper.class

Section 3: Configuring the Agile Application Server

For Oracle Application Server:

1. Undeploy the application server.
 - a. Make sure Oracle Application Server is running.
To check OAS status, open a command prompt window, change to the <OAS_Home>\opmn\bin directory, and run opmnctl status. If OAS isn't running, run opmnctl startall.
 - b. From a command prompt window, change to the agile_home\agiledomain\bin directory.
 - c. Run UnDeployAgile.
2. Stop the OPMN processes from the Oracle home directory:
 - a. Open a command prompt window.
 - b. Stop the Oracle Application Server Control Console:
\\oracle_home\bin\emctl stop iasconsole
 - c. Stop the Oracle Application Server instance:
\\oracle_home\opmn\bin\opmnctl stopall

3. Use the ExtractArchive utility, located in the agile_home\install directory, to unpack the agile_home\agileDomain\applications\application.ear file.
4. Add the jVue folder, created in Section 2, to the ExpandedWar directory of the application.war file, located inside of the application.ear file.
The path should be as follows:
agile_home\agileDomain\applications\ExpandedEar\ExpandedWar.
5. Use the RepackArchive utility, located in the agile_home\install directory, to repack the application.ear file.
6. Restart the Oracle Application Server instance:
\oracle_home\opmn\bin\opmnctl startall
7. Check the status of the Oracle Application Server instance:
\oracle_home\opmn\bin\opmnctl status
8. Deploy the Agile application:
\agile_home\agileDomain\bin\DeployAgile
When deployment is finished, the script prompts that the Agile application has been deployed.
9. Verify that the Agile application is deployed:
\oracle_home\dcml\bin\dcmlctl listapplications

Section 4: Configuring the File Server

1. Stop the Tomcat Service.
2. Delete the deployed folder of your file manager, located at agile_home\Tomcat\webapps. The name of this deployed folder is equivalent to the name of the Virtual Path entered for File Manager during installation. The default folder name is Filemgr.
3. Open a command prompt window to unpack the webfs.war file, located at agile_home\agileDomain\applications, with the following command:
jar xvf webfs.war
4. Add the jVue folder, created in Section 2, to the unpacked webfs.war file.
5. Add the vueServlet.jar and jVue.jar files copied in Section 2 to the unpacked webfs.war file directory under \WEB-INF\lib.
6. Set the Agile Viewer Host Name and Port Number in the web.xml file, located inside the agile_home\agileDomain\applications\webfs.war at the \WEB-INF\ path.

```
<servlet-name>VueServlet</servlet-name>
    <servlet-class>com.cimmetry.servlet.VueServlet</servlet-class>
    <init-param>
        <param-name>JVueServer</param-name>
        <!--<param-value>hcmweb:5099</param-value-->
        <param-value>server_host_name:port</param-value>
    </init-param>
```

7. From the system or location where your Agile Application Server is installed, copy the com folder located in the agile_home\agileDomain\deployment\tomcat\applet directory to the jVue folder you added to the unpacked webfs.war file directory.

8. Start the File Manager.
9. Check the VueServer Connection on the File Server Configuration page with the following URL:
http://<fileserver_host>:<port>/<fileserver_virtual_path>/Configuration

Note Note: Repeat the steps in this section on ALL Distributed File Managers.

Agile e-PDM Integration

This Appendix includes the following:

- Configuring Agile PLM..... 125
- Configuring Agile e-PDM 126

Once Agile PLM installation is complete, the procedures described in this section are required to enable interaction between the Agile PLM system and Agile e-PDM.

Updates to Agile e-PDM from Agile PLM can only be performed by users who have permission to log into the Agile e-PDM Web Client. Similarly, the ability to add Agile e-PDM deliverables and links in Agile PE can be performed only by users who have permission to log in to the Agile e-PDM Web Client.

- | | |
|------|--|
| Note | You must stop the Agile PLM and Agile e-PDM servers before making any of the following configuration changes. When done with the configuration changes, restart the servers. |
| Note | For an Agile e5.1.1 integration, download the updated ep-security.jar file from the Eigner support website and copy the file into
<e5.1.1_home>\axalant\bin\java on the e5.1.1 machine. |

Configuring Agile PLM

To configure the external adapter:

1. Using a text editor, open the file agile.properties in the agile_home\agileDomain\config\ folder.
2. Update the external.adapter.class property value as follows:
external.adapter.class=com.agile.integration.eigner.EignerAdapter

To edit Agile e5.1 properties:

1. Using a text editor, open the file agile.properties in the agile_home\agileDomain\config\ folder.
2. Edit the following Agile e-PDM connection properties:
eigner.axa_host=localhost
eigner.axa_socket=16067
#For e5.1.1, eigner.axa_socket=16067
#For e6.0.2, eigner.axa_socket=16077
eigner.axa_env=axalantORIGIN
eigner.axa_conn_timeout=3600000
eigner.axa_call_timeout=3600000

```
eigner.http_port=8088
```

```
# EIGNER ADMIN USER PASSWORD.
```

```
#
```

```
eigner.axa_admin_user=DEMOEP_M
```

```
eigner.axa_admin_pwd=87B00781D80D58EEE50C
```

Note	The admin user name and password should be generated for the system. The encrypted password can be generated by running the following utility; at the prompt, enter the cleartext password to be encrypted:
-------------	---

```
agile_home\agileDomain\bin\encryptpwd.cmd
```

On a UNIX system, use the shell script encryptpwd.sh

To enable the Activity field:

1. Run the following SQL script to automatically enable the LIST25 attribute in the Activity class in Agile PLM:

```
sqlplus dbuser/dbuserPwd@<TNSName to Agile PLM Database>
```

```
SQL> @EignerSetup.SQL
```

Note	You can also enable the List field using administrative functionality available in the Agile Java Client.
-------------	---

2. In the agile.properties file, find the line:

```
external.childSyncFlexField=LIST25
```

Replace LIST25 with the attribute name of the list field you enabled.

Optional Edits:

You can modify certain values in the agile.properties file as needed:

- The following property value controls the interval at which Users and User Groups are automatic synchronized from Agile e-PDM into Agile PPM.

```
external.resourceNGroupSyncTimeInMillis=3600000
```

The default value is 3600000 milliseconds, that is, every hour.

- The following property value controls the interval at which Deliverables in Agile PPM are evaluated to see if its completion criteria are met in Agile e-PDM.

```
external.deliverablesSyncTimeInMillis=1800000
```

The default value is 1800000 milliseconds, that is, every 30 minutes.

Configuring Agile e-PDM

Configure Agile e-PDM to prevent users from deleting deliverable or link objects referenced by Agile PLM objects.

To set up a database link to the Agile PLM database:

1. Add the following roles and privileges to the Agile e-PDM database user:

```
SQL> grant connect, resource role to <Agile e-PDM Database User>;
```

```
SQL> grant create database link, create synonym system privileges to <Agile e-PDM Database User>;
```
2. On the Agile e-PDM database machine, set up the TNS name for the Agile PLM database as: *database_SID.domain_name*

Note The TNS name must be this format: *database_SID.domain_name*, where *database_SID* is the Agile PLM database system identifier, such as agile9, and *domain_name* is the Agile PLM database server domain name, such as agilesoft.com.

3. Log on to the Agile e-PDM database user in SQLPlus and create a database link and synonym:

```
> sqlplus <Agile e-PDM Database User>/<Agile e-PDM Database User password>
```

```
SQL> CREATE DATABASE LINK agile9 CONNECT TO eigner IDENTIFIED BY tartan USING 'agile9.agilesoft.com'
```

```
SQL> CREATE SYNONYM s_a_ext_obj FOR external_object_view@agile9;
```

Note If you receive an ORA-02085 error after creating the database and synonym, run the following script before attempting to recreate the database and synonym:

```
ALTER SYSTEM SET GLOBAL_NAMES=FALSE;
```

4. Test to make sure you can connect to the Agile PLM database using the new Database Link:

```
SQL> select count(*) from external_object_view@agile9;
```

To load Agile e-PDM Loader files:

1. Load the loader file lgv_pe_int2.dat in INSERT mode.
2. Load the loader file dtv_pe_int2.dat in INSERT mode.
3. Add the respective LGV calls to the standard forms and lists as the last Pre-Action Trigger. For each object type (documents, parts, processes, EWOs, EWRs, folders, projects), add a new LGV call to the respective mask as Pre-Action-Userexit (not in the loader file) as listed below:

```
"EP_PE_INT/DocCheckDeliverable_PRA
```

```
"EP_PE_INT/PrtCheckDeliverable_PRA
```

```
"EP_PE_INT/PrcCheckDeliverable_PRA
```

```
"EP_PE_INT/EWOCheckDeliverable_PRA
```

```
"EP_PE_INT/EWRCheckDeliverable_PRA
```

```
"EP_PE_INT/FolCheckDeliverable_PRA
```

```
"EP_PE_INT/ProCheckDeliverable_PRA
```

Note	Change management should be disabled if the integration is performed using Agile e6.0.2.
------	--

Agile System Maintenance

This Appendix includes the following:

▪ Using the Server as a Client	129
▪ Performance Tuning	129
▪ Configuring Database Access using Agile Administrative Settings	131
▪ Color Settings	132
▪ Dynamic Versus Static IP Addresses	132
▪ Checking Your TCP/IP Connection	132
▪ Configuring Browsers on Client Computers.....	133
▪ Uninstalling Agile PLM.....	133

Using the Server as a Client

After installation, test Agile PLM on the server to make sure that client systems can start Agile products. You may also need to test Agile administration modifications as well. For best results, apart from this testing, do *not* use the Agile PLM server to perform data-related tasks such as creating and modifying Items and Changes.

Performance Tuning

This section provides some information on how to tune the application server to improve the performance of Agile PLM.

Tuning JVM Parameters

Oracle Application Server Containers for J2EE (OC4J) is a Java process that requires a Java virtual machine (JVM) to run. You can fine-tune your system's JVM settings to improve memory management and garbage collection.

JVM settings for OC4J are contained in the oracle_home\opmn\conf\opmn.xml file. To find JVM settings, look for the following lines in that file:

```
<ias-component id="OC4J">
  <process-type id="home" module-id="OC4J"
status="enabled">
    <module-data>
      <category id="start-parameters">
        <data id="java-options" value="<enter JVM
settings here>" />
```

Important If you modify the opmn.xml file, you must restart Oracle Application Server.

The following table provides recommended JVM settings for the Agile Application Server:

Parameter	Description	Windows	UNIX	Comments
Xms	Minimum Heap Size	1024m	1024m	The Minimum and Maximum Heap Sizes should be set to the same value. On Windows, the maximum value that can be safely set is 1236m. On UNIX, there is no upper limit, but it is not advisable to have higher heap sizes unless there are more CPUs available. The general Rule of Thumb is 1GB Heap Size for every 2 CPUs.
Xmx	Maximum Heap Size	1024m	1024m	
XX:MaxPermSize	Maximum space for permanent objects	256m	256m	Based on the Max Heap Size, this value can be increased proportionately.
XX:NewSize	Initial memory size for new objects	256m	256m	Based on the Max Heap Size, this value can be increased proportionately.
XX:MaxNewSize	Maximum memory size for new objects	256m	256m	Based on the Max Heap Size, this value can be increased proportionately.
VMType	Hotspot or server	hotspot	server	On Windows, -hotspot VM gives the best results. On UNIX, -server option gives the best results

Note The Agile PLM installer adjusts JVM parameters to the following values if available physical memory of the machine exceeds 1.5Gb:

`-Xms1024m -Xmx1024m -XX:MaxPermSize=256m -XX:NewSize=256m -XX:MaxNewSize=256m`

For more information about how to tune JVM settings for OC4J, see the *Oracle Application Server Performance Guide*. Also see "Performance Documentation for the Java Hotspot VM" available at the Sun Developer Network: <http://java.sun.com/docs/hotspot/index.html>

Tuning Oracle HTTP Server

This section describes how to tune Oracle HTTP Server to improve Agile PLM performance. The main configuration file for Oracle HTTP Server is `httpd.conf`. It is located in the following directory:

Windows: `oracle_home\Apache\Apache\conf`

UNIX: `oracle_home/Apache/Apache/conf`

Open the `httpd.conf` file to edit it. You can use any text editor.

In the `httpd.conf` file, search for the following parameters: `ThreadsPerChild` and `MaxClients`. The recommended settings are shown below:

```
# Number of concurrent threads (i.e., requests) the server
will allow.
# Set this value according to the responsiveness of the
server (more
```

```
# requests active at once means they're all handled more
slowly) and
# the amount of system resources you'll allow the server to
consume.
#
ThreadsPerChild 25 (for every 2 CPUs on the Application Server)
#
# Limit on total number of servers running, i.e., limit on
the number
# of clients who can simultaneously connect --- if this
limit is ever
# reached, clients will be LOCKED OUT, so it should NOT BE
SET TOO LOW.
# It is intended mainly as a brake to keep a runaway server
from taking
# the system with it as it spirals down...
#
MaxClients 25 (for every 2 CPUs on the Application Server)
```

Important If you modify the httpd.conf file, you must restart Oracle Application Server.

Configuring Database Access using Agile Administrative Settings

Access to the Agile database is controlled through the roles and privileges you grant users using the Agile web client administrative settings. Before allowing any external access to your Agile servers, you must first consider who needs access and what they need to access.

The list of potential external users may include, but is not limited to:

- Contract manufacturers
- Suppliers
- Customers
- Licensees
- Remote manufacturing facilities
- Field service personnel
- Traveling employees

Allowing access to third-party companies, such as contract manufacturers, may require special consideration. Most likely, you do not want these users to have access to *all* of your product information. Instead, you may want to grant them access to only a small subset of your data. For instance, they may need access only to data about products that they build for you.

Agile recommends that you create a role using the Agile Java client administrative settings for each different type of external user. Once the role is defined, users can be assigned to the role. All users

assigned to the role will inherit the privileges that are assigned to the role.

The Agile Web client administrative settings includes with a role called Example - Subcontractor that can be used as a template for setting up access for external users. For more information, see the *Agile Administrator Guide*.

You can take this one step further, and create a Page Two field on all Items and Changes called External User. This field can be filled with any external usernames that are allowed to access each Item or Change. A privilege can then be created for each role that allows access only to objects based on the value of this field. For instance, privileges can be created and granted so that Acme CEM employees can read only objects that have the value Acme in the External User field.

Configuring Your Firewall

Most likely, your Agile servers are located behind your corporate firewall. An important part of system security is allowing incoming connections from the Agile web client to Agile Application Server and Agile Viewer, while restricting access to other parts of your system.

If the computer with Agile Application Server does not have registered IP addresses, the firewall will most likely have to do some sort of IP address translation.

Color Settings

For best support of the current Agile PLM color-coded user interface, set client computers to display more than 256 colors.

Dynamic Versus Static IP Addresses

You can use dynamic IP addresses with “long-term lease” assignments, as well as static addresses, for Oracle systems. For best results, do not change the hostname of computers in the system, and use static addresses for Windows servers.

Checking Your TCP/IP Connection

To verify that the client computer has a TCP/IP connection to the Web server:

1. Open a Command Prompt window.
2. In the Command Prompt window, ping the Web server by typing:
ping servername

The system returns a statement similar to the following:

Pinging server_name [10.1.1.160] with 32 bytes of data:
Reply from 10.1.1.160: bytes=32 time =1ms TTL=128

This response verifies that your TCP/IP connection is working.

Configuring Browsers on Client Computers

Agile recommends that all browsers are set to check for newer versions of stored pages every visit to the page.

To set Internet Explorer to check for newer versions of stored pages every visit to the page:

1. Open Start > Settings > Control Panel > Internet Options.
2. On the General tab of the Internet Properties dialog box, click Settings in the Temporary Internet files section.
3. Select Check for newer versions of stored pages: Every visit to the page, then Click OK.
4. Click OK to close the Properties dialog box.

Uninstalling Agile PLM

Follow these instructions to remove Agile PLM 9.2.2.1.

To remove Agile PLM 9.2.2.1 on Windows:

1. Stop the following services:
 - IIS Admin Service
 - World Wide Web Publishing Service
 - AgileService (if you installed the Application Server as a service)
-
- Note** If Trend Micro anti-virus software is running on the same computer where Agile PLM is installed, stop the Trend Micro service before stopping AgileService.
-
2. Undeploy the Agile application from Oracle Application Server. To do this, follow these steps.
 - a. Make sure Oracle Application Server is still running.

To check OAS status, open a command prompt window, change to <OAS_Home>\opmn\bin directory, and run opmnctl status. If OAS isn't running, run opmnctl startall.
 - b. From a command prompt window, change to the agile_home\agileDomain\bin directory.
 - c. Run UnDeployAgile.
 3. Choose Start > All Programs > Agile > Agile 9.2.2.1 > Uninstall Agile 9.2.2.1.
 4. Click Uninstall on the Uninstall Agile window.
 5. Click Done when finished.
 6. Restart the computer.

Tuning Memory for Java Applets

This Appendix includes the following:

- Java Control Panel 136
- Frequently Asked Questions..... 136

The Agile Web Client uses Java applets for advanced functionality. Examples include the Gantt Chart and the Agile Viewer. These applets use the Java Plug-in to run inside your browser.

The amount of memory an applet requires depends on the content it attempts to load. If you experience memory problems while running the Gantt Chart, the Agile Viewer, or other Java applets, you should increase the amount of memory available to Java applets. To configure Java applet runtime parameters, use the Java Control Panel.

To adjust Java applet runtime parameters on Windows:

1. From the Windows Control Panel, run Java to open the Java Control Panel.
2. Click the Java tab.
3. In the Java Applet Runtime Settings box, click View. The Java Runtime Settings dialog box appears.
4. In the Java Runtime Parameters box, add the following:
`-Xmx<memory-limit>`

For example, to set maximum available memory to 256Mb, enter `-Xmx256M`.

5. Click OK to close the Java Runtime Settings dialog box.
6. Click OK to close the Java Control Panel.
7. Restart the browser.

To adjust Java applet runtime parameters on UNIX:

1. Determine which version of the Java Plug-in the browser is using.
2. Run the script `<java-dir>/jre/bin/ControlPanel` to open the Java Control Panel.
3. Click the Java tab.
4. In the Java Applet Runtime Settings box, click View. The Java Runtime Settings dialog box appears.
5. In the Java Runtime Parameters box, add the following:
`-Xmx<memory-limit>`

For example, to set maximum available memory to 256Mb, enter `-Xmx256M`.

6. Click OK to close the Java Runtime Settings dialog box.
7. Click OK to close the Java Control Panel.
8. Restart the browser.

To adjust Java applet runtime parameters on Mac OS X:

1. Determine which version of the Java Plug-in the browser is using.
2. In Finder, run the Applications > Utilities > Java > Java <java-version> > Plugin Settings command.
3. In the Java Runtime Parameters box, add the following:

`-Xmx<memory-limit>`

For example, to set maximum available memory to 256Mb, enter `-Xmx256M`.

4. Click Apply.
5. Close the control panel, and restart the browser.

Java Control Panel

For more information about the Java Control Panel and how to configure Java runtime settings on your client computer, go to <http://java.sun.com> (<http://java.sun.com>) and search for “Java Control Panel”.

Frequently Asked Questions

How much physical available memory do I need to run Agile PLM applets?

Please see the *Agile PLM Capacity Planning and Deployment Guide* for all Agile PLM hardware and software requirements.

In general, you will need at least 256Mb free available memory to use for Java applets. If the machine does not have that much memory available, a RAM upgrade is recommended to achieve the best performance.

On Windows, you can see the free available memory by opening the Windows Task Manager and clicking the Performance tab.

Do you need Administrator privileges on the client machine to modify Java runtime settings?

It depends on who installed Java on the machine. If the Administrator installed it, only he will have permission to modify Java runtime settings.

What is the -Xmx Java runtime parameter?

It sets the maximum size of the memory allocation pool. The default value is 64Mb.

Are there other Java runtime parameters?

Yes, there are several other Java runtime parameters that you can configure. For a complete list, see the Java Control Panel documentation.