

# Retek® Invoice Matching 10.2



## Installation Guide



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### **When contacting Customer Support, please provide:**

- Product version and program/module name.
- Functional and technical description of the problem (include business impact).
- Detailed step by step instructions to recreate.
- Exact error message received.
- Screen shots of each step you take.



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# Chapter 1 – Hardware and software requirements

Before you install any Retek Retail Solutions product, you need to make sure that your information systems can adequately run the software that you are installing, as well as process the amount of data that you expect to manage. This section lists the suggested hardware and software requirements for Retek Invoice Matching products. The following are suggested hardware and software requirements:

**Supported Media** – Retek Invoice Matching is available on CD-ROM only. Tape is not available.

**Database Server** – database software requirements.

**Application Server** – including operating system software and development tools, and a list of hardware choices.

**Web Browser** – including the requirements that a Web browser must meet and a list of Web browsers and versions from which you can choose. The following table lists acceptable operating system versions and Web browser versions.

	Database Server	Application Server	Client
Vendor	RMS 9 : Oracle RDBMS 8i – Enterprise Edition Terminal release, 8.1.7 f  RMS 10: Oracle RDBMS 9i – Enterprise Edition Release, 9.2	Oracle Container for J2EE (OC4J) 9.0.3.0.0  latest 9.2 JDBC classes12dms.jar in \$OC4JHOME/jdbc/lib	Web Browser (IE 5.5+)  Java runtime for WebHelp
Retek (Invoice Matching 10.2)	DDL (Views, Triggers, Tables etc.) Data Scripts	Java War file	

Because you need to choose hardware that has sufficient random access memory (RAM) and program and data storage capacity for the products you choose, each section lists criteria you can use to “size” your hardware selections. The totals you discover after factoring in sizing issues are approximate.

### Database server

**General Requirements** for a database server capable of running Invoice Matching include:

- Unix (or Unix variant) based OS certified with Oracle 8i (for RMS 9) or Oracle 9i (for RMS 10)
- Oracle RDBMS 8i/9i Enterprise Edition
- Oracle Partitioning
- Oracle Net services

**Hardware/OS Options** as used for development (see Oracle's Website for certified platforms):

- Sun/Solaris 2.8
- IBM/AIX 4.3.3.x
- Hewlett Packard/HP UX 11.I

**Note:** Oracle bug #2200335 regarding table inserts is resolved with patch #1970629, Sun Platform only.

### Application server

**General Requirements** for an application server capable of running Invoice Matching include:

- UNIX (or UNIX variant)
- Oracle Container for J2EE – OC4J

**Sizing Factors and Other Suggestions** to factor into your selection of an application server include:

- CD-ROM drive
- 1 Gbit network adapter
- ~300 Mb Free disk space for ReIM War file and java source code

**Hardware/OS Options** as used for development:

- Sun/Solaris 2.6, 2.7, 2.8
- IBM/AIX 4.3.3 or AIX 5.1
- Hewlett Packard/HP UX 11.0 or 11.11



## Web browser and client requirements

**General requirements and suggestions** for client capable of running Invoice Matching include:

### **Client PCs**

- Use Windows 98, 2000, XP or NT 4.0 with service pack 5 or higher
- Set the resolution to 1024x768 pixels or higher

**Sizing factors and other suggestions** to factor into your selection of a PC or network configuration include:

- Bandwidth/Speed
- PC Configuration (minimum 64 MB RAM, 200MHZ processor)

**Browser options** to factor into your selection include:

- Internet Explorer 5.5 or higher
- MS or Sun Java must be enabled for WebHelp to function.



## Chapter 2 – Database server installation instructions

Follow these steps to install the database server component of the Invoice Matching 10.2 software.

### Getting started

#### UNIX user account

The Unix user that ReIM will use to install and compile the Retek Invoice Matching 10.2 Database Server and Application Server objects on UNIX systems is the same as the one used for either RMS 10.1.4 or RMS 9.0.12. Through this install guide we will refer to this user as rmsdev.

Before you apply ReIM 10.2:

- Check that either RMS 10.1.4 or RMS 9.0.12 is installed.

### Copy and unpack install files from CDROM

- 1 Log into the UNIX system that will house the database.
- 2 Create a directory for the install files. This directory will be referred to as <INSTALL\_DIR> for the remainder of this document.
- 3 Copy the dbserverunix.Z file from the CDROM mount point to the <INSTALL\_DIR>.
- 4 Once the copy is complete, uncompress and untar the file to create the install directory structure:

```
UNIX> mkdir <INSTALL_DIR>
UNIX> cp <CDROM>/dbserverunix.Z <INSTALL_DIR>
UNIX> cd <INSTALL_DIR>
UNIX> uncompress dbserverunix.Z
UNIX> tar xvf dbserverunix.tar
```

The directory structure will look like this:

```
<INSTALL_DIR>/
    db_objects/
    dbcs/
    sqlplus/
    trig/
```

- 5 The tar file may not retain the permissions settings they had when leaving Retek, so verify that the source code is protected by altering the permissions with the chmod command. Keep in mind there will be some directories that need to be written to during this install process.

- 6 Verify that all files are owned by retek and that the retek user belongs to the dba group. Make ownership and group changes if necessary.

### Create ReIM database objects

**Note:** If you are running RMS 9, the following grant must give to the RMS 9 Schema owner:

```
SQL> grant query rewrite to <RMS 9 Schema Owner>;
```

- 1 Change directories to the <INSTALL\_DIR>/dbcs
- 2 Log into the database as rmsdev
- 3 Execute the following command:  
**For RMS 9**  

```
SQL> @startalldbcs_9.sql
```

**For RMS 10**  

```
SQL> @startalldbcs_10.sql
```
- 4 View the log file when finished to verify that no errors were found.

### Populate ReIM data

- 1 Change directories to the <INSTALL\_DIR>/sqlplus
- 2 Log into the database as rmsdev
- 3 Execute the following command  
**For RMS 9**  

```
SQL> @startallctl_9.sql
```

**For RMS 10**  

```
SQL> @startallctl_10.sql
```
- 4 View the log file when finished to verify that no errors were found.

### Update packages, stored procedures and functions

- 1 Change directories to the <INSTALL\_DIR>/db\_objects
- 2 Log into the database as rmsdev
- 3 Execute the following command  

```
SQL> @startall_dbo.sql
```
- 4 View the log file when finished to verify that no errors were found.

## Update triggers

- 1 Change directories to the <INSTALL\_DIR>/db\_objects
- 2 Log into the database as rmsdev
- 3 Execute the following command  
**For RMS 9**  

```
SQL> @startalltrig_9.sql
```

**For RMS 10**  

```
SQL> @startalltrig_10.sql
```
- 4 View the log file when finished to verify that no errors were found.
- 5 After you have compiled all these objects, validate any objects that may have become invalid. You can do this by using the Oracle utility  
`dbms_utility.compile_schema.`



## Chapter 3 – Application server installation instructions

### Oracle containers for J2EE – OC4J

#### UNIX (Sun Solaris/HPUX/AIX)

**Note:** Normally OC4J is installed in an existing Oracle 9iAS (9IAS\_ORACLE\_HOME) location. However, OC4J can be installed and run outside 9IAS\_ORACLE\_HOME. For this reason, ORACLE\_HOME refers to the location where OC4J will be installed.

**Note:** JDK 1.3.x is a requirement for both OC4J and ReIM.

#### Install OC4J 9.0.3

**Note:** OC4J 9.0.3 is distributed in a ZIP file format -> oc4j\_extended.zip. This zip file can be obtained from the Oracle Technology Network web site. Basic install/deployment information for version 9.0.3 is given below. Additional information about OC4J may be obtained by consulting Oracle support.

**Note:** The latest 9.2 JDBC **classes12dms.jar** is required for ReIM. This file can be obtained from the Oracle Technology Network web site, and must be copied to \$ORACLE\_HOME/jdbc/lib.

- 1 Copy oc4j\_extended.zip to \$ORACLE\_HOME.
- 2 Extract oc4j\_extended.zip.
- 3 Change directories to \$ORACLE\_HOME/j2ee/home:  

```
> cd $ORACLE_HOME/j2ee/home
```
- 4 Install OC4J by issuing the following command:  

```
> java -jar oc4j.jar -install
```

**Note:** The OC4J installation auto-deploys a number of applications and then prompts for an administration username and password, which is used for the administration console command-line tool.

## Copy and unpack install files from CDROM

- 1 Log into the UNIX system that will house the application server.
- 2 Create a directory for the install files. This directory will be referred to as <INSTALL\_DIR> for the remainder of the UNIX Application Server section.
- 3 Copy the appserverunix.tar file from the CDROM mount point to the <INSTALL\_DIR>.
- 4 Once the copy is complete, untar the file to create the install directory structure:

```
> mkdir <INSTALL_DIR>
> uncompress appserverunix.tar
UNIX> tar xvf appserverunix.tar
```

The directory structure will look like this:

```
<INSTALL_DIR>/
    reconfigure/
    reconfigure.sh
    src.zip
    web.zip
    batchscripts.tar
    reim9.war
    reim10.war
```

- 5 The tar file may not retain the permissions settings they had when leaving Retek, so verify that the source code is protected by altering the permissions with the chmod command. Keep in mind there will be some directories that need to be written to during this install process. See previous comment on page5, item #5.
- 6 Verify that all files are owned by retek and that user retek belongs to the dba group. Make any ownership and group changes if necessary.



## Configure OC4J and Deploy the ReIM War File into the Default OC4J Application

**Note:** J2EE\_HOME refers to \$ORACLE\_HOME/j2ee/home.

**Note:** The variable <product> refers to the name of the ReIM war file (**reim9** for RMS 9 or **reim10** for RMS 10).

- 1 Edit reconfigure.sh to suit your environment.
  - Set JAVA\_HOME to the JDK 1.3.x location on your server
  - Set REIM\_BASE\_DIR to a temporary staging directory for the reconfigured ReIM war file
  - Set REIM\_WAR\_FILE to the correct war file: reim9.war or reim10.war

```
#!/bin/sh
## Environment
JAVA_HOME=/usr/j2se/bin/java
ANT_HOME=./reconfigure/ant
## ReIM specific
PATH=$ANT_HOME/bin:$PATH
REIM_WAR_FILE=reim9.war
REIM_TEMP_DIR=/tmp/reim
REIM_BASE_DIR=/home /ReIM/
export REIM_WAR_FILE
export REIM_TEMP_DIR
export REIM_BASE_DIR
export JAVA_HOME
$ANT_HOME/bin/ant -verbose -buildfile reconfigure/reconfigure.xml
exit 0
```

- 2 Edit reconfigure/reconfigure.xml to suit your environment.

**Note:** Further explanation of these can be found in the operations guide.

```
<!-- change properties, these should be changed to reflect YOUR install -->
<propertyfile file="${REIM_TEMP_DIR}/WEB-INF/classes/com/retex/reim/reim.properties">
  <entry key="url" value="jdbc:oracle:thin:@mspdev26:1522:rmsim8i" />
  <entry key="username" value="bimtst90user" />
  <entry key="password" value="retex" />
  <entry key="datasource" value="rms9"/>
  <entry key="logpath" value="${REIM_BASE_DIR}/ReIMLogs/90tst"/>
  <entry key="batcherrorlogpath"
value="${REIM_BASE_DIR}/ReIMLogs/90tst"/>
  <entry key="batchlogpath"
value="${REIM_BASE_DIR}/ReIMLogs/90tst"/>
  <entry key="DATA_PATH"
value="${REIM_BASE_DIR}/ediDataFiles90"/>
  <entry key="schemaOwner" value="bimtst90"/>
  <entry key="beanDriver" value="com.retek.reim.foundation.rms9."/>
  <entry key="authentication_source" value="DATABASE"/>
</propertyfile>
```

- 3 Run reconfigure.sh. This expands the war file in the base directory.
- 4 Backup the following files at \$J2EE\_HOME/config:
  - application.xml
  - http-web-site.xml
  - global-web-application.xml
- 5 Copy the war file from REIM\_BASE\_DIR to \$J2EE\_HOME/applications.
- 6 Modify **application.xml** by adding another web-module element for the REIM product deployment.

**Example:** <web-module id="<product>"  
path="./applications/<product>.war" />

- 7 Modify **http-web-site.xml** by changing the listener port (if necessary) and by adding another web-app element for the product deployment.

**Example:** <web-site port="8388" display-name=" Default Oracle9iAS  
Containers for J2EE HTTP Web Site">

<web-app application="default" name="<product>" root="<product>" />

**Note:** **id** in <web-module> and **name** in <web-app> must be the same value.

- 8 This step is optional. Modify **global-web-application.xml** to include a precompile parameter (in bold below).

**Example:** `<servlet>`  
                  `<servlet-name>jsp</servlet-name>`  
                  `...`  
                  `<init-param >`  
                  `<param-name>precompile_check</param-`  
**name>**  
                  `<param-value>true</param-value>`  
                  `</init-param>`  
                  `...`  
                  `</servlet>`

## Start/Stop/Load the default OC4J application

- 1 To start the default OC4J container, issue the following command in \$J2EE\_HOME:  

```
> java -jar oc4j.jar &
```

“Oracle9iAS (9.0.3.0.0) Containers for J2EE initialized” (or similar) is displayed at the command line after successful startup.
- 2 To stop the default OC4J container, issue the following command in \$J2EE\_HOME:  

```
> java -jar admin.jar ormi://<server_name>/ <admin_id>  
<admin_password> -shutdown -force
```

**Note:** <server\_name> is the name of the server or its IP address. <admin\_id> and <admin\_password> are the administration username and password supplied during the OC4J install.

**Example:** java -jar admin.jar ormi:/retekdev10/ admin admin -shutdown -force

- 3 If the precompile parameter was set to true, load the following url in a browser:

<http://<server>:<port>/<product>/precompile.jsp>

The JSP pages will now be precompiled: this avoids the first application user having to wait while each page is compiled by the JSP container. This operation should take approximately 5-10 minutes.

**Example:** <http://server:8388/reim9/precompile.jsp>

- 4 Load the new OC4J application by entering the following URL in a browser:

<http://<server>:<port>/<product>/>

- server = name or IP address of the web server OC4J is running on
- port = port number set in default-web-site.xml above
- product = value of root in the web-app element of default-web-site.xml above

**Example:** <http://server:8388/reim9/>

## Configure ReIM batch scripts

- 1 1 Extract the tar archive file to your UNIX filesystem:

```
UNIX> tar xvf batchscripts.tar
```

The directory structure will look like this:

```
<INSTALL_DIR>/
generic
reimautomatch -> generic
reimediinvdownload -> generic
reimediinvupload -> generic
reimposting -> generic
reimpurge -> generic
reimrollup -> generic
```

- 2 The script called generic is the master script; the other files are symbolic links to the master script. When batch is invoked by calling one of these scripts the generic script uses the symbolic link filename to determine which Java class to call.

To configure, alter the following lines in generic:

- REIMHOME=/files2/bbyim/oc4j903\_im/j2ee/home/rms90xdev-application/reim90dev
- JAVA\_HOME=/vol.rtk/java/solaris/java1.3.1\_07

These should reflect the location of your unpacked classes from the war file and the location of Java on your system.

## Configure Help files

- 1 Copy the help.zip file from the <INSTALL\_DIR> to \$J2EE\_HOME/applications/<product>/WebHelp.
- 2 Unzip the help.zip file:
 

```
> unzip help.zip
```

**Note:** If you are using IE 5.5 or higher, perform the following steps in IE:

Under Tools->Internet Options->Advanced: Uncheck the Java Sun, “Use Java 2 v [jdk\_version] for <applet>” setting.

Under Tools->Internet Options->General->Settings... button in the Temporary Internet Files area: ensure “Check for newer versions of stored pages: Every visit to the page” is checked.

## Windows NT/2000

**Note:** Normally OC4J is installed in an existing Oracle 9iAS (%9IAS\_ORACLE\_HOME%) location. However, OC4J can be installed and run outside %9IAS\_ORACLE\_HOME%. For this reason, %ORACLE\_HOME% refers to the location where OC4J will be installed.

**Note:** JDK 1.3.x is a requirement for both OC4J and ReIM.

### Install OC4J

**Note:** OC4J 9.0.3 is distributed in a ZIP file format -> oc4j\_extended.zip. This zip file can be obtained from the Oracle Technology Network web site. Basic install/deployment information for version 9.0.3 is given below. Additional information about OC4J may be obtained by consulting Oracle support.

**Note:** The latest 9.2 JDBC **classes12dms.jar** is required for ReIM. This file can be obtained from the Oracle Technology Network web site, and must be copied to \$ORACLE\_HOME\jdbc\lib.

- 1 Copy oc4j\_extended.zip to %ORACLE\_HOME%.
- 2 Extract oc4j\_extended.zip.
- 3 Change directories to %ORACLE\_HOME%\j2ee\home.
- 4 Install OC4J by issuing the following at an MSDOS command:  

```
> java -jar oc4j.jar -install
```

**Note:** The OC4J installation auto-deploys a number of applications and then prompts for an administration username and password, which is used for the administration console command-line tool.

### Copy and unpack install files from CDROM

Mount the CD-ROM on your Windows NT/2000 Application Server.

- 1 Change directories to \appservernt.
- 2 Double-click on appservernt.exe.
- 3 When prompted, enter a staging directory to temporarily hold the patch code. The directory structure will look like this:

```
<INSTALL_DIR>\
    reconfigure\
    reconfigure.bat
    src.zip
    web.zip
    batchscripts.tar
    reim9.war
    reim10.war
```

## Configure OC4J and Deploy the ReIM War File into the Default OC4J Application

**Note:** %J2EE\_HOME% refers to %ORACLE\_HOME%\j2ee\home.

**Note:** The variable <product> refers to the name of the ReIM war file (**reim9** for RMS 9 or **reim10** for RMS 10).

- 1 Edit reconfigure.bat to suit your environment:
  - Set JAVA\_HOME to the JDK 1.3.x location on your server
  - Set REIM\_BASE\_DIR to a temporary staging directory for the reconfigured ReIM war file
  - Set REIM\_WAR\_FILE to the correct war file: reim9.war or reim10.war

### Example:

```
## Environment
set JAVA_HOME=c:\jdk1.3.1_07
set ANT_HOME=.\\reconfigure\ant

## ReIM specific
set PATH=%ANT_HOME%\bin;%PATH%
set REIM_WAR_FILE=reim9.war
set REIM_TEMP_DIR=c:\tmp\reim
set REIM_BASE_DIR=c:\ReIMbase

%ANT_HOME%\bin\ant.bat -verbose -buildfile reconfigure/reconfigure.xml
```

- 2 Edit reconfigure\reconfigure.xml to suit your environment:

**Note:** Further explanation of these can be found in the operations guide.

```
<!-- change properties, these should be changed to reflect YOUR install -->
<propertyfile file="{REIM_TEMP_DIR}/WEB-INF/classes/com/retex/reim/reim.properties">
<entry key="url" value="jdbc:oracle:thin:@mspdev26:1522:rmsim8i" />
<entry key="username" value="bimtst90user" />
<entry key="password" value="retex" />
<entry key="datasource" value="rms9"/>
<entry key="logpath" value="{REIM_BASE_DIR}/ReIMLogs/90tst"/>
<entry key="batcherrorlogpath"
value="{REIM_BASE_DIR}/ReIMLogs/90tst"/>
<entry key="batchlogpath"
value="{REIM_BASE_DIR}/ReIMLogs/90tst"/>
```

```

<entry key="DATA_PATH"
value="{REIM_BASE_DIR}/ediDataFiles90"/>
<entry key="schemaOwner" value="bimst90"/>
<entry key="beanDriver" value="com.retek.reim.foundation.rms9."/>
<entry key="authentication_source" value="DATABASE"/>
</propertyfile>

```

- 3 Run reconfigure.bat. This expands the war file in the base directory.
- 4 Back up the following files at %J2EE\_HOME%\config:
  - application.xml
  - http-web-site.xml
  - global-web-application.xml
- 5 Copy the war file from %REIM\_BASE\_DIR% to %J2EE\_HOME%\applications.
- 6 Modify **application.xml** by adding another web-module element for the REIM product deployment.

**Example:** <web-module id="<product>"  
path="../applications/<product>.war" />

- 7 Modify **http-web-site.xml** by changing the listener port (if necessary) and by adding another web-app element for the product deployment.

**Example:** <web-site port="8388" display-name=" Default Oracle9iAS  
Containers for J2EE HTTP Web Site">

<web-app application="default" name="<product>" root="<product>" />

**Note:** **id** in <web-module> and **name** in <web-app> must be the same value.

- 8 This step is optional. Modify **global-web-application.xml** to include a precompile parameter (in bold below).

**Example:** <servlet>

<servlet-name>jsp</servlet-name>

...

<init-param >

<param-name>precompile\_check</param-  
name>

<param-value>true</param-value>

</init-param>

...

</servlet>



## Start/Stop/Load the default OC4J application

- 1 To start the default OC4J container, issue the following command from an MSDOS prompt in %J2EE\_HOME%:

```
> java -jar oc4j.jar &
```

“Oracle9iAS (9.0.3.0.0) Containers for J2EE initialized” (or similar) is displayed at the command line after successful startup.

- 2 To stop the default OC4J container, issue the following command from an MSDOS prompt in %J2EE\_HOME%:

```
> java -jar admin.jar ormi://<server_name>/ <admin_id>
<admin_password> -shutdown -force
```

**Note:** <server\_name> is the name of the server or it's IP address. <admin\_id> and <admin\_password> are the administration username and password supplied during the OC4J install.

**Example:** java -jar admin.jar ormi:/retekdev9/ admin admin -shutdown -force

- 3 If the precompile parameter was set to true, load the following url in a browser:

<http://<server>:<port>/<product>/precompile.jsp>

The JSP pages will now be precompiled; this avoids the first application user having to wait while each page is compiled by the JSP container. This operation should take approximately 5-10 minutes.

**Example:** <http://server:8388/reim9/precompile.jsp>

- 4 Load the new OC4J application by entering the following URL in a browser

<http://<server>:<port>/<product>/>

- server = name or IP address of the web server OC4J is running on
- port = port number set in default-web-site.xml above
- product = value of root in the web-app element of default-web-site.xml above

**Example:** <http://server:8388/reim9/>

## Configure ReIM batch scripts

- 1 Extract the tar archive file to your UNIX filesystem.

```
UNIX> tar xvf batchscripts.tar
```

The directory structure will look like this:

```
<INSTALL_DIR>/
generic
reimautomatch -> generic
reimediinvsdownload -> generic
reimediinvupload -> generic
reimposting -> generic
reimpurge -> generic
reimrollup -> generic
```

- 2 The script called generic is the master script; the other files are symbolic links to the master script. When batch is invoked by calling one of these scripts the generic script uses the symbolic link filename to determine which Java class to call.

To configure, alter the following lines in generic:

- REIMHOME=/files2/bbyim/oc4j903\_im/j2ee/home/rms90xdev-application/reim90dev
- JAVA\_HOME=/vol.rtk/java/solaris/java1.3.1\_07

These should reflect the location of your unpacked classes from the war file, and the location of Java on your system.

## Configure Help files

- 1 Copy the help.zip file from <INSTALL\_DIR> to %J2EE\_HOME%\applications\<product>\WebHelp
- 2 Unzip the help.zip file

```
UNIX> unzip help.zip
```

**Note:** If you are using IE 5.5 or higher, perform the following steps in IE:

Under Tools->Internet Options->Advanced: Uncheck the Java Sun, “Use Java 2 v [jdk\_version] for <applet>” setting.

Under Tools->Internet Options->General->Settings... button in the Temporary Internet Files area: ensure “Check for newer versions of stored pages: Every visit to the page” is checked.