

Retek® Invoice Matching 10.2.1

Installation Guide



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Internet (ROCS)	www.retek.com/support Retek's secure client Web site to update and view issues
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Mail	Retek Customer Support Retek on the Mall 950 Nicollet Mall Minneapolis, MN 55403
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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 – Database server installation instructions

Before you apply the Invoice Matching patch:

- Make a backup of all your objects and database schema.
- Check that ReIM 10.2 is installed.
- Check that either RMS 10.1.4 or RMS 9.0.12 is installed.
- Review the enclosed Invoice Matching 10.2.1 Patch Release Notes (reim-1021-rn.pdf).
- Review each of the enclosed SIR documents.

Before copying over any files:

- Note whether customizations have been made to the module. If so, then the customizations must be reapplied over the new version of the module (or the fix may need to be applied to the custom version of the code).
- Copy the original files to a different directory before copying over them in case they need to be referred to at a later date.

Note: These instructions refer to reimdev10 as the Oracle owning schema.

Mount CD-ROM on the Database Server

- 1 Mount the CD-ROM on your Database Server.
- 2 Change directories to /dbserverunix.
- 3 Copy the reim1021dbpatch.tar.z file from the CD /dbserverunix directory to a newly created staging directory on your UNIX server.
- 4 Log in to UNIX.
- 5 Change directories to the staging directory.

Note: The tar file must have a .Z extension.

- 6 If the tar file has a “z” in lowercase, change it by typing:

```
mv reim1021dbpatch.tar.z reim1021dbpatch.tar.Z
```
- 7 Uncompress the tar file by entering:

```
uncompress reim1021dbpatch.tar.Z
```
- 8 Untar the tar file by entering:

```
tar xvf reim1021dbpatch.tar
```

Create ReIM database objects

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

```
SQL> grant create any type to <RMS 9 Schema Owner>;
```

- 1 Change directories to the <INSTALL_DIR>/dbcs
- 2 Log into the database as reimdev10
- 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 reimdev10
- 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 reimdev10
- 3 Execute the following command

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

Update triggers

- 1 Change directories to the <INSTALL_DIR>/trig
- 2 Log into the database as reimdev10
- 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 2 – 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.

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 reim1021apppatch.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>
> untar reim1021apppatch.tar
UNIX> tar xvf reim1021apppatch.tar
```

The directory structure will look like this:

```
<INSTALL_DIR>/
    reconfigure/
    reconfigure.sh
    src.zip
    web.zip
    help.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 page 5, 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="${REIM_TEMP_DIR}/WEB-INF/classes/com/rettek/reim/reim.properties">
  <entry key="url" value="jdbc:oracle:thin:@mspdev26:1522:rmsim8i" />
  <entry key="username" value="bimtst90user" />
  <entry key="password" value="rettek" />
  <entry key="datasource" value="rms9"/>
  <entry key="logpath" value="${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 Backup the following objects currently deployed in \$J2EE_HOME/applications:
 - reim9.war
 - reim9/

Note: This is the directory that was created when deploying the <product>.war file just backed up

Note: If you are using ReIM 10 the war file will be reim10 and the directory will be reim10.

- 6 Copy the war file from REIM_BASE_DIR to \$J2EE_HOME/applications.

- 7 Modify **application.xml** by adding another web-module element for the REIM product deployment.

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

- 8 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.

- 9 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 Make a back up of your batch scripts.
- 2 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
reimreceiptwriteoff -> generic
reimrollup -> generic
reimtermsranking -> 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 (%ORACLE_HOME%) location. However, OC4J can be installed and run outside %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.

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 reim1021apppatch.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
    help.zip
    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="bimst90user" />
  <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 Back up the following objects currently deployed in %J2EE_HOME%\applications:
 - reim9.war
 - reim9\

Note: This is the directory that was created when deploying the <product>.war file just backed up

Note: If you are using ReIM 10 the war file will be reim10 and the directory will be reim10.

- 6 Copy the war file from %REIM_BASE_DIR% to %J2EE_HOME%\applications.
- 7 Modify **application.xml** by adding another web-module element for the REIM product deployment.

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

- 8 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.

- 9 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:/retexdev9/ 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
reimreceiptwriteoff -> generic
reimrollup -> generic
reimtermsranking -> 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.

Chapter 3 – Applying source code

If customizations have been made to Invoice Matching, the 10.2.1 source code can be compiled and applied to the application. Compile the .java source code included on this CD, then, place the generated .class files into the appropriate directory locations.

Before applying the patch source files over existing code:

- Note whether customizations have been made to the module. If so, then the customizations must be reapplied to the new version of the module (or the fix may need to be applied to the custom version of the code).

Back up the existing Invoice Matching class files before copying over the 10.2.1 class files in order to refer to them at a later date if necessary.