

# Retek<sup>®</sup> Invoice Matching<sup>™</sup> 10.2.5

## Installation Guide



---

**Corporate Headquarters:**

Retek Inc.  
Retek on the Mall  
950 Nicollet Mall  
Minneapolis, MN 55403  
USA  
888.61.RETEK (toll free US)  
Switchboard:  
+1 612 587 5000  
Fax:  
+1 612 587 5100

**European Headquarters:**

Retek  
110 Wigmore Street  
London  
W1U 3RW  
United Kingdom  
Switchboard:  
+44 (0)20 7563 4600  
Sales Enquiries:  
+44 (0)20 7563 46 46  
Fax:  
+44 (0)20 7563 46 10

The software described in this documentation is furnished under a license agreement, is the confidential information of Retek Inc., and may be used only in accordance with the terms of the agreement.

No part of this documentation may be reproduced or transmitted in any form or by any means without the express written permission of Retek Inc., Retek on the Mall, 950 Nicollet Mall, Minneapolis, MN 55403, and the copyright notice may not be removed without the consent of Retek Inc.

Information in this documentation is subject to change without notice.

Retek provides product documentation in a read-only-format to ensure content integrity. Retek Customer Support cannot support documentation that has been changed without Retek authorization.

Retek<sup>®</sup> Invoice Matching<sup>™</sup> is a trademark of Retek Inc.

Retek and the Retek logo are registered trademarks of Retek Inc.

This unpublished work is protected by confidentiality agreement, and by trade secret, copyright, and other laws. In the event of publication, the following notice shall apply:

©2004 Retek Inc. All rights reserved.

All other product names mentioned are trademarks or registered trademarks of their respective owners and should be treated as such.

Printed in the United States of America.

## Customer Support

### Customer Support hours

Customer Support is available 7x24x365 via email, phone, and Web access.

Depending on the Support option chosen by a particular client (Standard, Plus, or Premium), the times that certain services are delivered may be restricted. Severity 1 (Critical) issues are addressed on a 7x24 basis and receive continuous attention until resolved, for all clients on active maintenance. Retek customers on active maintenance agreements may contact a global Customer Support representative in accordance with contract terms in one of the following ways.

Contact Method	Contact Information
----------------	---------------------

E-mail	support@retек.com
--------	-------------------

Internet (ROCS)	<a href="https://rocs.retek.com">rocs.retek.com</a> Retek's secure client Web site to update and view issues
-----------------	-----------------------------------------------------------------------------------------------------------------

Phone	+1 612 587 5800
-------	-----------------

Toll free alternatives are also available in various regions of the world:

Australia	+1 800 555 923 (AU-Telstra) or +1 800 000 562 (AU-Optus)
France	0800 90 91 66
Hong Kong	800 96 4262
Korea	00 308 13 1342
United Kingdom	0800 917 2863
United States	+1 800 61 RETEK or 800 617 3835

Mail	Retek Customer Support Retek on the Mall 950 Nicollet Mall Minneapolis, MN 55403
------	-------------------------------------------------------------------------------------------

### 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.

# Contents

<b>Chapter 1 – Database server installation instructions.....</b>	<b>1</b>
Mount CD-ROM on the Database Server .....	1
Create ReIM database objects .....	2
<b>Chapter 2 – Application server installation instructions .....</b>	<b>3</b>
Oracle containers for J2EE – OC4J .....	3
UNIX (Sun Solaris/HPUX/AIX) .....	3
Copy and unpack install files from CDROM .....	3
Configure OC4J and Deploy the ReIM War File into the Default OC4J Application .....	4
Start/Stop/Load the default OC4J application .....	7
Windows NT/2000.....	8
Copy and unpack install files from CDROM .....	8
Configure OC4J and Deploy the ReIM War File into the Default OC4J Application .....	8
Start/Stop/Load the default OC4J application .....	10
<b>Chapter 3 – Applying source code .....</b>	<b>11</b>



# 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 10.2.4 are installed.
- Check that either RMS 10.1.8, RMS 10.2.1 or RMS 9.0.16 is installed.
- Review the enclosed Invoice Matching 10.2.5 Patch Release Notes (reim-1024-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 reim1025dbpatch.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 reim1025dbpatch.tar.z reim1025dbpatch.tar.Z
```
- 7 Uncompress the tar file by entering:  

```
uncompress reim1025dbpatch.tar.Z
```
- 8 Untar the tar file by entering:  

```
tar xvf reim1025dbpatch.tar
```

### Create ReIM database objects

- 1 Change directories to the <INSTALL\_DIR>/db\_objects
- 2 Log into the database as reimdev10
- 3 Execute the following command:  

```
SQL> @patch1025reim.sql
```
- 4 View the log file when finished to verify that no errors were found.



# 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 reim1024apppatch.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 reim1025apppatch.tar
UNIX> tar xvf reim1025apppatch.tar
```

The directory structure will look like this:

```
<INSTALL_DIR>/
    reconfigure/
    reconfigure.sh
    reim.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.
- 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, reim.war.

- 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.

```
#!/bin/sh
## Environment
JAVA_HOME=/usr/j2se/bin/java
ANT_HOME=./reconfigure/ant
## ReIM specific
PATH=$ANT_HOME/bin:$PATH
REIM_WAR_FILE=reim.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="${REIM_TEMP_DIR}/WEB-INF/classes/com/rettek/reim/reim.properties">
  <entry key="url" value="jdbc:oracle:thin:@mspdev26:1522:rmsim8i" />
  <entry key="username" value="bimst90user" />
  <entry key="password" value="rettek" />
  <entry key="datasource" value="rms9"/>
  <entry key="logpath" value="${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="bimst90"/>
  <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 Back up the following objects currently deployed in \$J2EE\_HOME/applications:
  - reim.war
  - reim/
- 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" />

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

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

-  **Example:** `<servlet>`  
`<servlet-name>jsp</servlet-name>`

### 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/reim/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/reim/>

## 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.

### 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 reim1025apppatch.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
        reim.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, reim.war.

- 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



**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=reim.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/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.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:
  - reim.war
  - reim\



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

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



**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://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/reim/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/reim/>



## Chapter 3 – Applying source code

If customizations have been made to Invoice Matching, the 10.2.5 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 10.2.5 class files in order to refer to them at a later date if necessary.