Agile e6.0.2

Administration Manual for Agile e6.0.2

Part Number: ADMIN-602C

REVISIONS

Revision	Date	Pages Effected	Description
A	30/03/2006	All	Initial document
B	21/07/2006	35	New paragraph: Configuring the FileService Vault for the Web Client
C	17/07/2006	18	Chapter Configuring the Agile e6 Business Services Change path from `ext/jboss/bin/conf to ext/jboss/conf`

Contents

Chapter 1
Introduction

The *Administration Guide* describes how to administrate Agile e6 and the Agile e6 Business and Presentation Services. It also describes how to set up Online Help for the Agile e6 clients.

About Agile e6 Administration

An Agile e6 environment defines a particular hardware and software configuration that allows Agile e6 to work with a relational database. To administrate Agile e6, you can create and manage Agile e6 environments. For each created Agile e6 environment, information is stored on the Agile e6 Server that specifies how to connect to the database and locate data.

When installing a database together with Agile e6, the installation program automatically creates a default environment named *axalantORIGIN* and associates the environment name with the database.

It is also possible to create additional environments within the same installation. This might be necessary when using the *axalantORIGIN* environment for testing purposes before creating actual working environments.

Because a single Agile e6 installation can have multiple environments, it is not necessary to maintain separate installations for different purposes. A single Agile e6 installation often includes separate environments for various purposes such as development, testing, production, and education.

The environments created for an installation can be associated with the same or with different databases. An example of a multi-environment system is one in which development and test environments and their database co-exist with a production environment and its database.

> **Note:** You can implement customized product lifecycle management processes within an Agile e6 environment. Refer to the Agile e6 Online Help or contact your Agile Customer Support representative for more information on how to customize Agile e6 for your site.

About Agile e6 Business and Presentation Services Administration

When you install Agile e6, you can choose to install the Business and Presentation Services by selecting the *WEB and Workflow services* installation option. The Business and Presentation Services component comprises the following:

❑   The Web Presentation Service

❑   The Workflow module

Overview of the Web Presentation Service

The Web Presentation Service gives users access to PLM functionality through their web browsers. It manages web sessions, provides the Java Webstart Client for users and creates the DHTML they use to interact with the Agile e6 Server.

To administrate the Web Presentation Service, you create and manage Web Presentation Service environments. Each environment defines a particular software configuration that enables communications between web browsers and an Agile e6 Server via the Web Presentation Service.

For information on creating and managing Web Presentation Service environments, refer to the chapter *Administrating the Web Presentation Service* in this manual.

Overview of the Workflow module

The Workflow module provides a reliable and scaleable solution for the automation of business processes in an engineering organization. It lets you design a workflow process as a sequence of consecutive activities and assign individual resources—users, groups, roles, or distributions—to each of the work items for further processing.

To include Workflow processes in an Agile e6 environment, optional configuration parameters can be defined for the processes within the overall Agile e6 environment definition. For more information, refer to Section *Administrating Agile e6*.

Note: For information on using the Workflow module, refer to the Agile e6 Online Help: Using Agile e6 > Product Data Management > Workflow.

Making modification without the Administration Server

Note: Note that any file or configuration modification made without the Administration Server will be lost during a patch or upgrade.

Chapter 2

Administrating Agile e6

The Agile e6 Administration Server lets you create, configure, and delete Agile e6 environments using your web browser. Agile recommends that you use Internet Explorer 6.0, or Mozilla 1.7.x to connect to the Administration Server.

> **Note:** You might have to add the Administration Server to the trusted web sites in your browser settings if the following window opens:
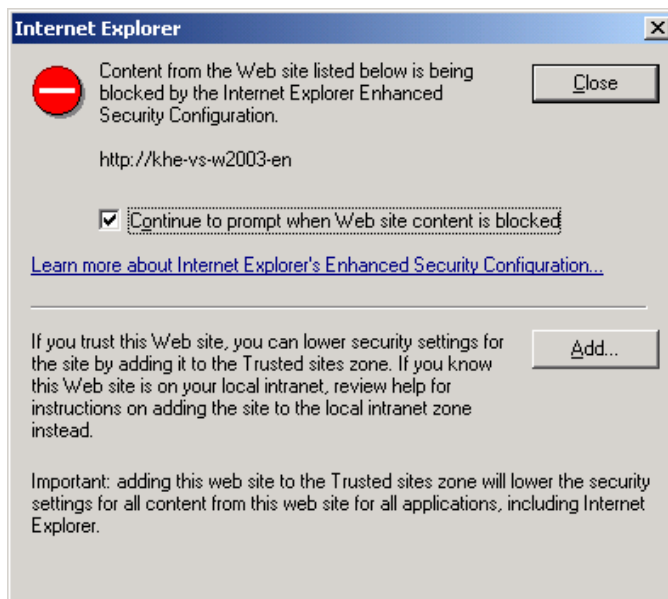
For information on using the Administration Server to administrate your Web Presentation Service environments, refer to the chapter *Administrating the Web Presentation Service.*

Connecting to the Administration Server

Complete the following steps to connect to the Administration Server and open the web page to administrate your Agile e6 environments.

1. Enter the following address in your Web Browser:

   http://localhost:8027/

   <localhost> is the name of the machine on which the Agile e6 server is installed. Use port number 8027 unless the default was changed to a different port number.

   > **Note:** If the Agile e6 Home Page below does not appear immediately, check the settings of your browser.
   >
   > In Internet Explorer click Tools > Internet Options > Connections > LAN settings, and make sure that the option "Bypass proxy server for local addresses" is checked.
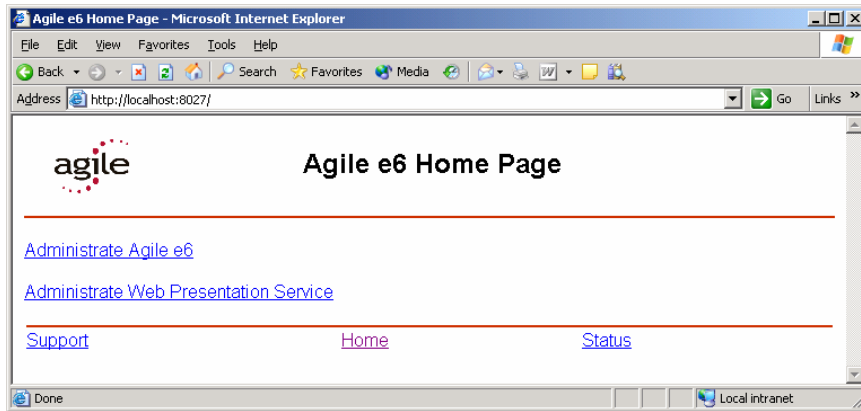
2. Click the link **Administrate Agile e6**.

3. Enter your user name (default: *plm*) and password (default: *plm60*) and click **OK**.

   This opens the following web page:
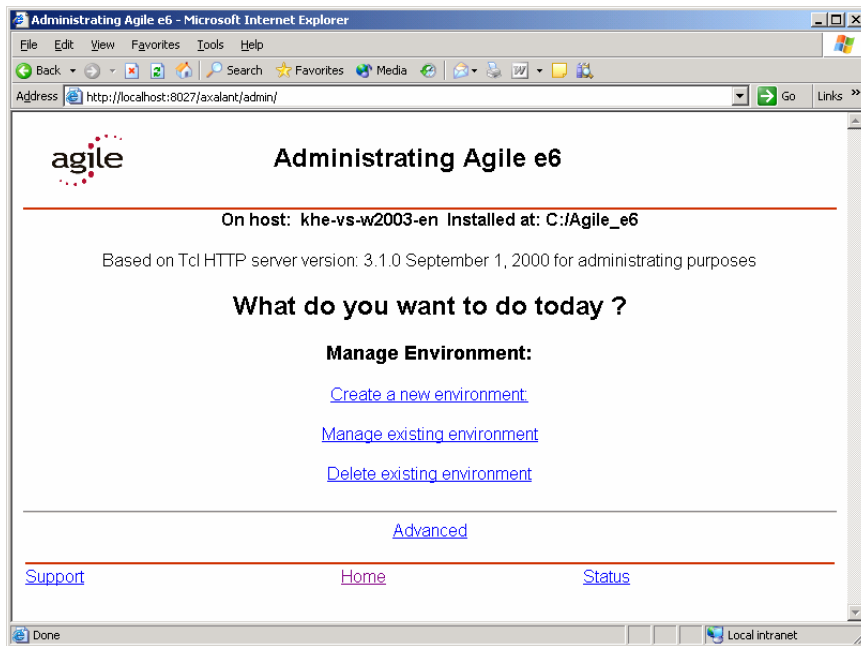
If the Oracle database is installed together with Agile e6, the program automatically associates the default environment name, *axalantORIGIN*, with the installed database. Use the **Manage Environment** links to create and configure environments.

If the database installation was not performed as part of the Agile e6 installation, refer to one of the documents listed below for instructions on how to set up the appropriate database package/platform:

For an Oracle Installation, refer to one of the following:

❑ Installing Oracle 10g for Windows

❑ Installing Oracle 10g for UNIX

❑ Installation Microsoft SQL Server 2005

These documents can be found on the Agile e6 DVD.

After having installed the database and imported the Agile e6 database dump, a new environment must be created or an existing one updated to associate Agile e6 with the database.

Once the Agile e6 environment is set up, it is accessible from any of the Agile e6 clients. For more information, refer to the client installation guide for your platform.

Creating Agile e6 Environments

To create a new environment, complete the following steps

1. Open the *Administrating Agile e6* page in your web browser

2. Click the link Create a new environment.

This opens the *Creating a new environment* page where an Agile e6 environment can be created and database parameters adapted to conform to your system.

3. Select the database type.

Choose between Oracle 10g or Microsoft SQL 2005.

Changing the database type will change the following default entries:

- Netname for Database
- Create User
  This will be disabled for the Microsoft SQL Server 2005 database type, because importing a dump while creating a new environment will always create a new user.
- DBA user
- DBA password
- JDBC Driver
- JDBC Connection URL

4. Enter database parameters to define the new environment.

The following figure shows the top section of the Environment Input Form where the database parameters are entered.

In the example, a new Oracle environment named plm_test was specified. As a new database user shall be created and a dump imported, a new copy of the default database schema is created which can be used to test changes before implementing them in the productive environment.
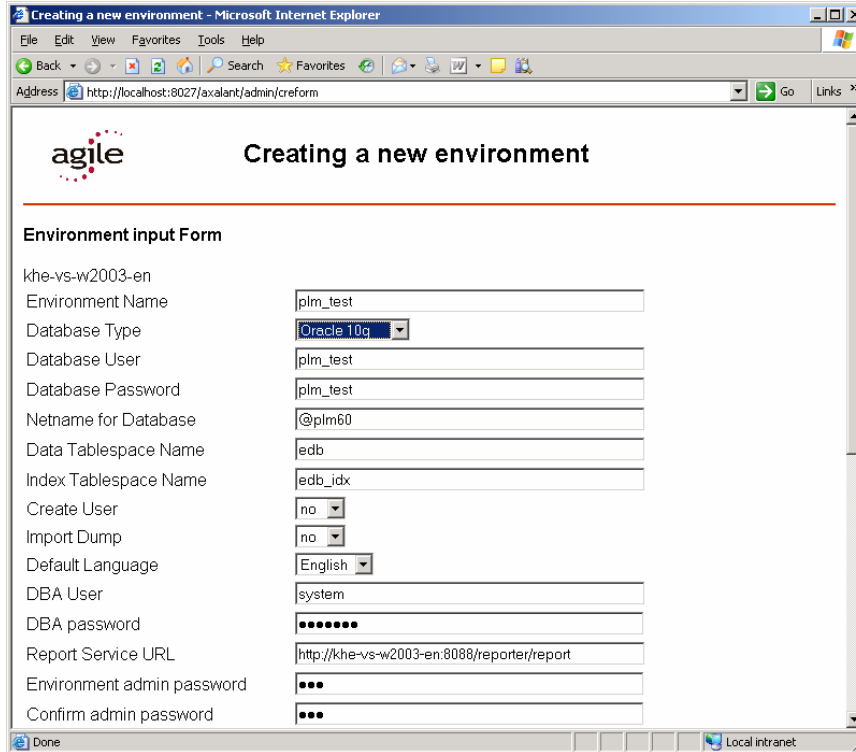
For descriptions of the required database parameters, refer to Section *Optional Business Services attributes*.

5. To make Workflow features accessible for this environment, click "enabled" beside PLM-Business-Services, and then specify optional Business Services attributes.

In the example shown in the following figure, the administrator has enabled the Agile e6 Business Services and retained all default attribute settings for an Oracle-based environment.
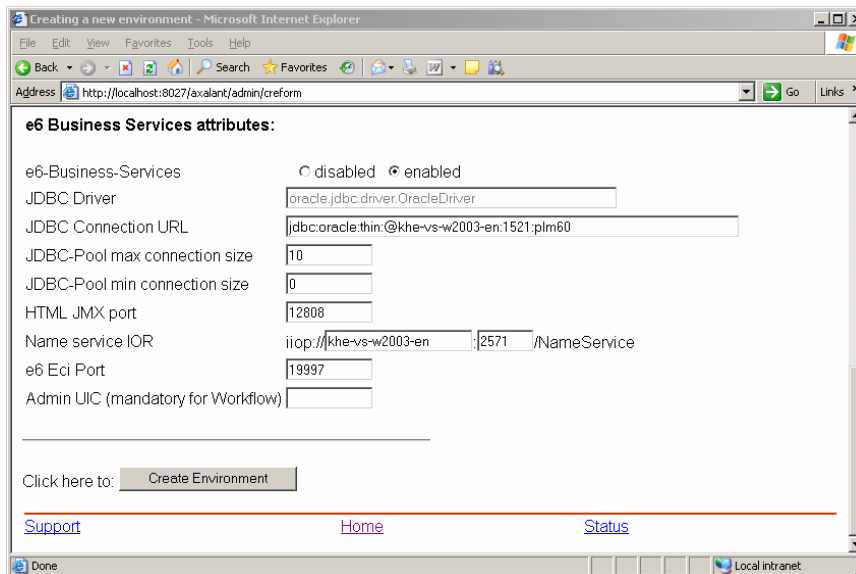
Note: The Admin UIC field is now mandatory for the Workflow Service.

You will get the following window if you enter a non-numeric or empty value for Admin UIC, if the Business Services is enabled.

For descriptions of the Business and Presentation Services attributes, refer to next Section *Optional Agile e6 Business Services attributes*.

6. Having entered all required data, click **Create Environment.**

The Agile e6 environment is created automatically. This may take some minutes. When the process is complete, a list of all specified environment parameters is displayed.

The Business Service is not started automatically.

Required database parameters

The following table describes the database parameters you must specify for each Agile e6 environment you create.

Database Parameter	Description
Environment Name	The name of the new Agile e6 environment. The default is *plm_test*.
Database Type	The type and version of the database system to be used with the new environment. Selected from the drop-down menu.
Database User	The name of the database user. The default is *plm_test*.
Database Password	The password of the database user. The default is *plm_test*.
Netname for Database	For Oracle, the service name of the Oracle database, prefixed with @. The default is *@plm60*. For Microsoft SQL Server 2005, the hostname of the SQL Server database, prefixed with @. The default is *@localhost*.
Data Tablespace Name	The name of the default tablespace of the database user. It is usually not necessary to change this parameter. The default is *edb*. **Caution:** Using a tablespace with a name other than *edb* may cause problems.

Database Parameter	Description
Index Tablespace Name	The name of the index tablespace of the database user. It is usually not necessary to change this parameter. The default is *edb_idx*.
Create User	Y*es*, creates a new environment and database. Must be set to *yes* if Import Dump is set to *yes*.
	This entry is disabled if the Database Type was set to Microsoft SQL 2005, because importing a dump while creating a new environment will always create a new user
	The default is *no*.
Import Dump	Y*es*, imports the default Agile e6 database schema into the new database.
	The default is *no*.
Default Language	Default language (English or German). This setting is applied only when a database dump is imported.
DBA User	DBA user:
	- Oracle: *system*
	- SQL Server 2005: sa
DBA password	The password of the DBA user.
	The DBA password is used only for database user creation and will not be stored.
	When creating a database during installation, note that the Oracle default password is changed by the installation to 'oracle'.
Report Service URL	Set the "Report Service URL" to an existing Web Presentation Service host and port. Related to Lightweight Reporting Module.
Environment admin password	Set an administrator password for the new environment. The default is *plm*.
	The administrator password is only used for deleting the environment.
Confirm admin password	Confirm the admin password for the environment.

Examples of database creation settings

Oracle:

❑ "Create User" = *no* and "Import Dump" = *no:* Create a new environment without any database changes.

Either the specified user must already exist, or needs to be created manually.

❑   "Create User" = *yes* and "Import Dump" = *no:* Create a new environment and a new database user.

     This environment is not usable until a database is imported manually with this user.

❑   "Create User" = *yes* and "Import Dump" = *yes:* Create a new environment and a new database user with data.

❑   "Create User" = *no* and "Import Dump" = *yes:* This option is not supported.

Microsoft SQL Server 2005:

❑   "Import Dump" = *yes*: Create a new environment and a new database user with data. This does only work if the Microsoft SQL Server 2005 is on the same machine as the application server is.

❑   "Import Dump" = *no:* Create a new environment without any database changes.

    Note: The "Create User" checkbox is always disabled, because importing a dump while creating a new environment will always create a new user

Optional Agile e6 Business Services attributes

The following table describes attributes you need to specify only if your installation includes the Agile e6 Business Services and you want to make Workflow features available to users.

For information on determining the active and used ports on your system, refer to Section *Viewing and editing an environment definition*.

Agile e6 Business Service Attribute	Description
e6-Business Services	When *enabled* is selected, users have access to Workflow features. The default is *disabled*. You can confirm that Workflow is enabled for an environment by viewing the environment definition. For more information, refer to Section *Viewing and editing an environment definition*
JDBC Driver	The database driver class. This parameter is database-system dependent and will automatically change to the appropriate driver class if the database type is changed.
JDBC Connection URL	The database connection URL. This parameter is database-system dependent, and it will change automatically depending on the *JDBC Driver* parameter setting. **Oracle:** jdbc:oracle:thin:@khe-vs-w2003-en:1521:plm60 khe-vs-w2003-en: Database server name 1521: Oracle listener port plm60: Oracle Instance name

Agile e6 Business Service Attribute	Description
JDBC-Pool max connection size JDBC-Pool min connection size	The maximum and minimum numbers of connections. The JDBC-Pool initializes MinSize connections and never drops below the specified number. On demand, the Pool will create up to the specified number of MaxSize connections. MinSize is the startup and "rest" state of the system. MaxSize is the maximum number of connections that will be created. This number should reflect the maximum number of concurrent Business Service requests, which should be less than the number of licensed users. As guidelines, choose MinSize of 5 and MaxSize as the greater of (MinSize*2) -or- (Number of Licensed users/10).
HTML JMX port	The port used as the HTML interface for dynamic administration of JBoss services. It allows you to start, stop, and review all the mbeans in the server. Making any changes to the mbeans may result in unpredictable results. The default is *12808*. **Important:** The specified port must be unique, unused, and secured.
Name service IOR	The communication port between the Agile e6 Server and the Agile e6 Business and Presentation Services. **Important:** The specified port must be unique and unused.
e6 Eci Port	The port used for communication between the Workflow editor and the ABS ECI Server. **Important:** The specified port must be unique and unused.
Admin UIC	As a standard user will not be able to handle general errors due to limited access rights, values for ADMIN_UIC must be entered! This admin user should be able to enter, change or delete person data. Also this person should be allowed to suspend and resume processes and to change resource entries in the activity list of the process. For further information please refer to "privileges" in the Role Concept module. **Important:** The specified UIC must be the numeric part of the UIC and not the Username.

Determining the active and used ports on your system

You can use the netstat command to list active TCP ports on your system.

1. To list active ports, enter `netstat -a`

2. To get more information, enter:

- UNIX: man netstat
- Windows: netstat /?

Use the `rcpinfo` command to list used RCP ports on your system. The command has an output on Windows only if the Agile_ePortmapper service is running. On UNIX systems, a portmapper is running by default.

1. To list used RCP ports, run `rpcinfo -p hostname`

2. To get more information, enter:

- UNIX: man rpcinfo
- Windows: rcpinfo /?

Configuring the Workflow Services Notifier

An important component of the Workflow module is the Workflow Services Notifier. The Notifier generates automatic e-mail messages to notify users of new and updated work orders.

To use the Notifier, you must set environment-specific parameters in the .ini file for the Agile e6 Business and Presentation Service:

    \<InstallDir>\ext\jboss\conf\\<EnvironmentName>\ABS_\<EnvironmentName>.ini

❑   *\<InstallDir>is* the name of the directory where Agile e6 is installed

❑   *\<EnvironmentName>,* is the name of the Agile e6 environment.

1. Edit the parameters in the following lines for each Agile e6 environment with which you want to use the Notifier:

    [Messenger]
    HOST=*\<Name>*
    FROM=*\<e-mail address>*
    Admin_UIC=*\<UIC number of the admin>*
    axalantSender=*\<e-mail-address>*
    axalantWebHost=<name**:**port number>
    axalantWebApplication=*\<name>*

The parameters are described in the following table.

Notifier Parameter	Setting
HOST	E-mail server name. The default is *mailout*.
FROM	Sender e-mail-address that the Notifier uses to send information about new work items and other tasks. The default is *workflow@agile.com*.
Admin_UIC	This parameter should be set with the Admin Server, which can be done in the 'Configure e6 Business Services' section.

Notifier Parameter	Setting
axalantSender	E-mail-address the notifier uses if the External E-Mail Integration is in enabled. The default is *axalant@agile.com*.
axalantWebHost	Agile e6 web hostname and port number (must be separated by a colon). These parameters are used in the html-layout files for the links to the Web Client. There is no default entry.
axalantWebApplication	axalantWebApplication=*<name>* Agile e6 application (or environment) name. The default is *axalant*.

Note: Refer to the Agile e6 Online Help: Workflow -> Manager Information -> Notifier Configuration for more information on the Notifier.

Note: You can also configure the Notifier to generate URLs for the Web Client containing hyperlinks for new and updated work items. For more information, refer to the Agile e6 Online Help: Customizing Agile e6 > Customizing the Web Client.

2. Stop and restart the Agile e6 Business and Presentation Services for each environment after you edit them.

Configuring Agile e6 Environments

Use the instructions in this section to configure an existing environment or to restart the Agile e6 Business Services after the server is rebooted.

1. Connect to the Administration Server and open the web page used to administrate Agile e6, as described in Section *Connecting to the Administration Server*.
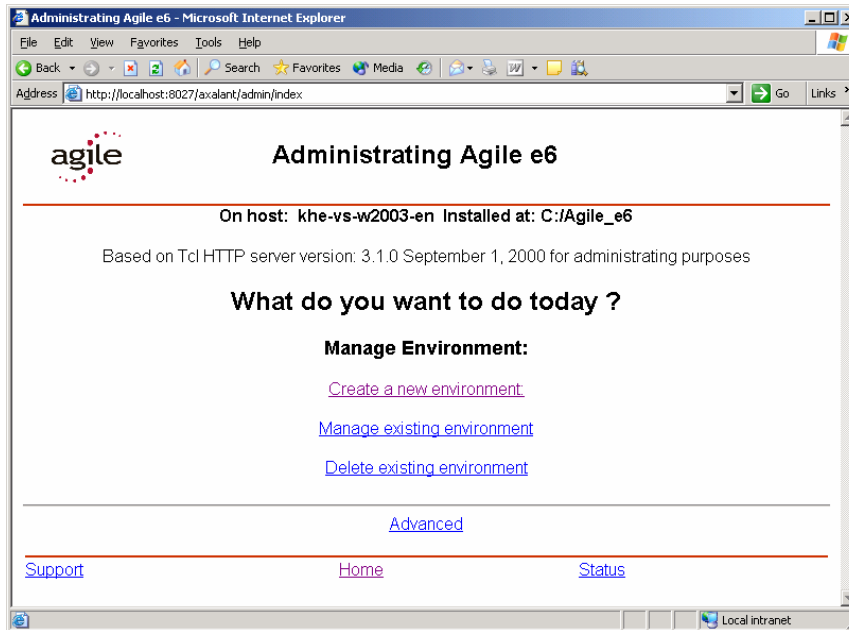
2. Click the link Manage existing environment.

This displays a list of existing environments similar to the one shown in the following figure. Note that the default environment, *axalantORIGIN,* was created automatically during your Agile e6 installation.
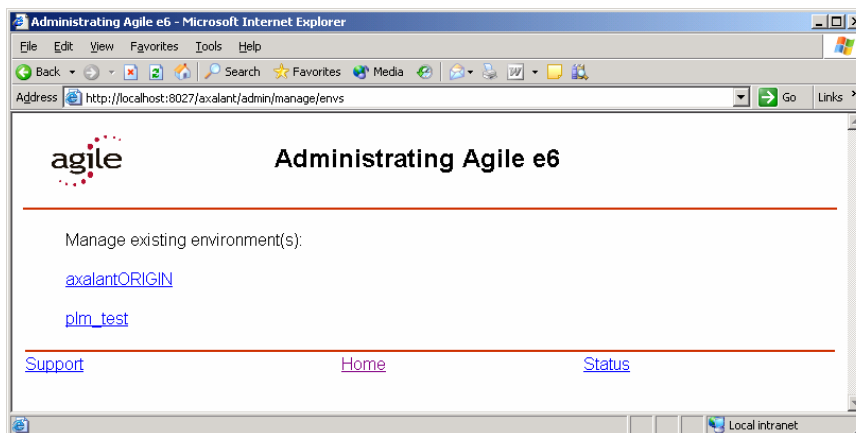
3. Click the link for the environment you want to reconfigure or restart.

This displays a menu of possible administration activities similar to the one shown in the following figure.
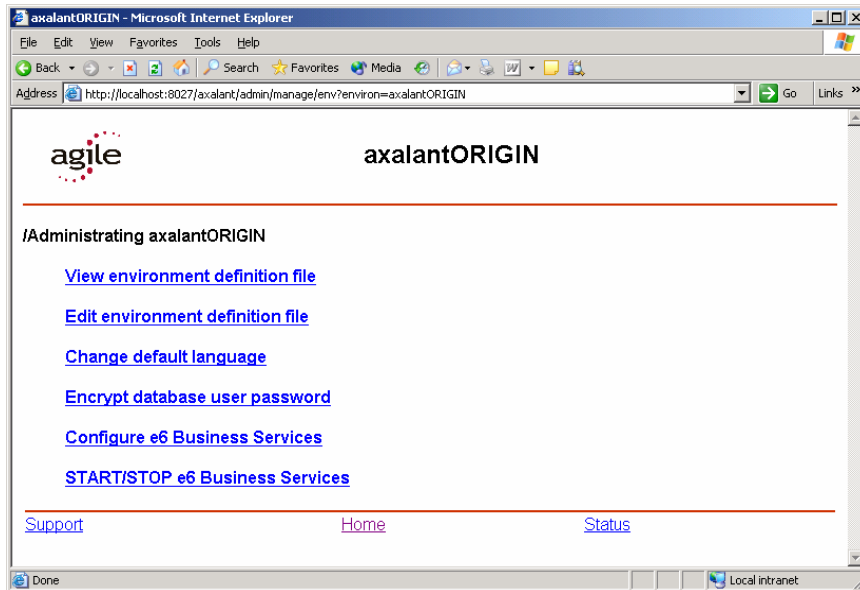
Viewing and editing an environment definition

Complete the following steps to view and edit the configuration file that defines your environment.

1. Connect to the Administration Server and open the web page used to administrate Agile e6, as described in Section *Connecting to the Administration Server*.

2. To view a list of the current attributes from your environment configuration file, click the link **View environment definition file.**

    The list of current attributes is displayed.
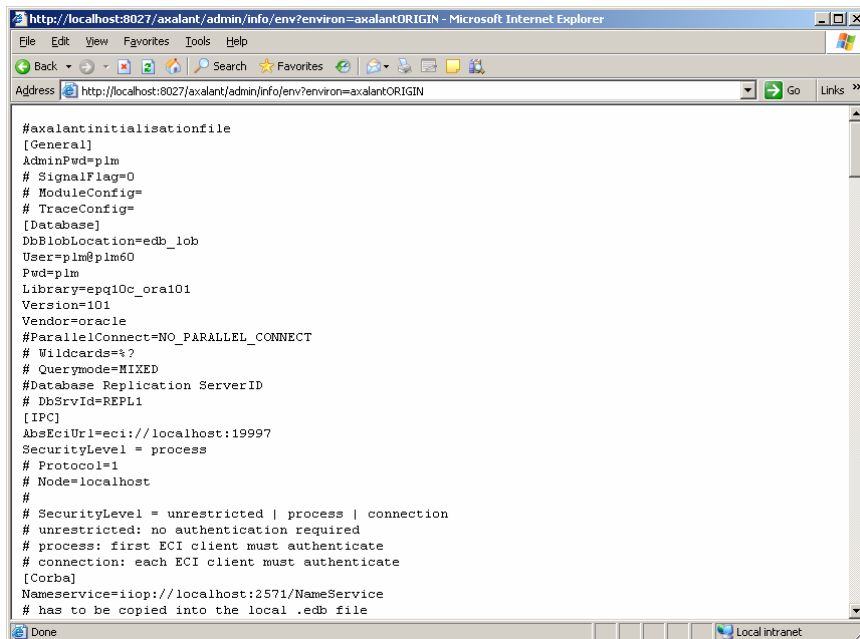
3. To edit any of the attributes, go back to the previous web page, and then click the link **Edit environment definition file.**

This displays a list of all entries (database connection, modules, special variables, and so forth) pertaining to your environment.
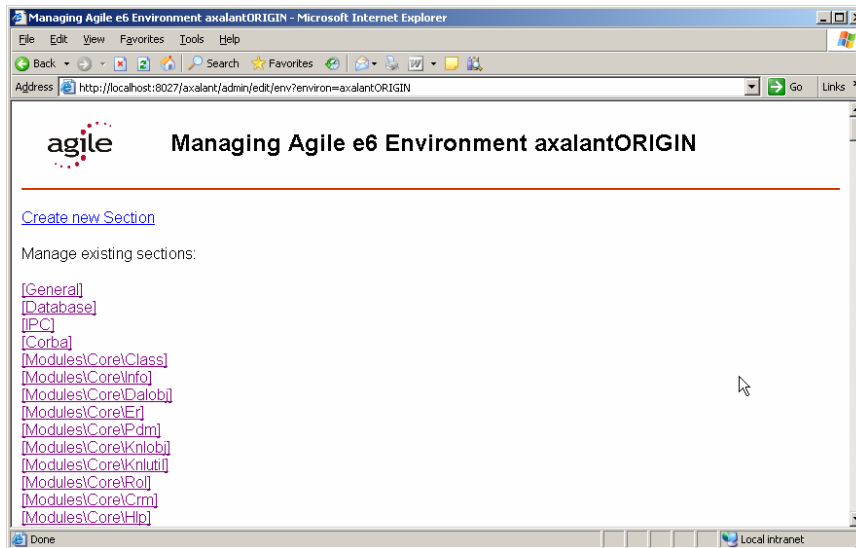
Note:	Do not modify the Agile e6 Business Services or the Web Presentation Service through this form. Use the "Configure e6 Business Services ", or the "Administrate Web Presentation Service" form to set or modify the Agile e6 Business and Presentation Services settings instead. For further information, refer to the Section *Creating Agile e6 Environments.*

Example:

1. To adapt the database-specific values to your installed database, click the **Database** link.

The following section of the form is opened:
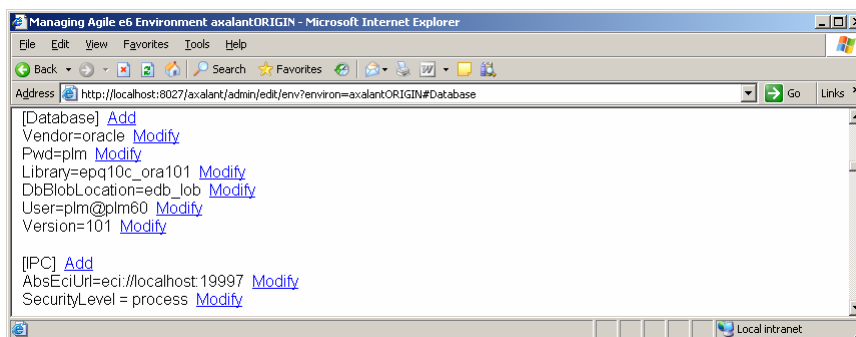
2. Click the Modify link next to "Pwd=plm" to modify the database user password to match your Oracle installation.

After modifying a value, return to the administration page.

To see current changes on the administration page, use F5 or Refresh to refresh the page contents.

Changing Default Language and Encrypting Database User Password

For each of your Agile e6 environments, you can change the default language setting that is applied when a database dump is imported. You can also encrypt the database user password for an environment to prevent unauthorized access to your Agile e6 data.

> **Note:** If you want to encrypt the database user password and change the default language for an environment, make sure to change the default language first. Once the password is encrypted, the default language can no longer be changed.

1. Connect to the Administration Server and open the **Administrate Agile e6** web page.

2. Click the link **Change default language**.

3. Choose a language from the drop-down menu and click Ok.

```
English ▼   Ok
English
German
```

4. Click the link **Encrypt database user password** and then click the button to encrypt the password.

```
Encrypt password now!
```
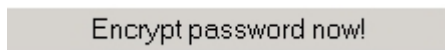
Activate I18N Features

> **Note:** For further information, please contact your Agile project engineer.

Requirement

❑ To be able to display the wanted characters, a font has to be installed that is capable of displaying them.

Setup I18N

The I18N feature is only used for multi-lingual fields and helps to set up languages that are not already in use (e.g. Japanese).

Follow these steps to setup I18N:

1. Use SQLPlus to change the entry in T_LANGUAGE.C_ENCODING to "UTF-8":

   SQL> UPDATE T_LANGUAGE SET C_ENCODING = 'UTF-8' WHERE C_SIGN = 'LN1';

   SQL> COMMIT;

2. Set the value of the System Configuration Parameter EDB-CHR-ENC-JVM to UTF-8.

   This tells Java and ECI clients which encoding they should use.

   > **Note:** If you want to create a new field for this language proceed with step 3, otherwise, proceed with step 4.

3. Connect the DataView client and create a field in the repository that uses this language. Add it to an entity and its mask. Perform a **Create table**.

   Agile e6 will automatically create a NVARCHAR column for this field.

4. Optionally, you may add a menu selection to choose this language as the default language.

❑ Open the menu EDB-USR-LANGUAGE

❑ Create a new menu selection:

Selection Assignment of EDB-USR-LANGUAGE

Selection Name	Sequence	Selection Text	Access	Userexit	Parameter
EDB-LNG-USR-LN1	30	LN1	a	lng_set_act_usr	LN1

❑ Adds I18N fields to your database.

> **Note:** If you want to add an I18N field to a table, you must know which database objects are affected by this additional multi-lingual field.

Test Your Setup

1. Start the Java Client and choose the new created language as the default language, under **Tools->Options->Representation**.

2. Add your font to the Java Client setup:

❑ Open Tools->Options->User interface and Connections.

❑ Go to the Mask settings and change the "fieldFont" entry using the font chooser. Select your Unicode font. Click OK to activate your changes.

❑ Open your test mask with the newly created field and insert a new record.

You should now be able to type, or copy & paste Japanese or any other special characters into the field, and the server will store them correctly. The Windows client (and any other non-I18N capable client) will show you the UTF-8 data.

> **Note:** Further information about the ECI Client can be found in the ECI documentation of the online help.

Configuring the Agile e6 Business Services

When the Agile e6 Business Services (formerly known as axalant Business and Presentation Services, or ABS) is enabled, the Agile e6 Workflow functionality is available to users.

> **Note:** To configure the Agile e6 Business Service for an Agile e6 environment, use the following procedure. Do not use the procedure for editing an environment definition.

1. Connect to the Administration Server and open the **Administrate Agile e6** web page u

2. Click the link **Manage Existing Environments** and choose the environment you want to modify.

3. Click the link Configure e6 Business Service.
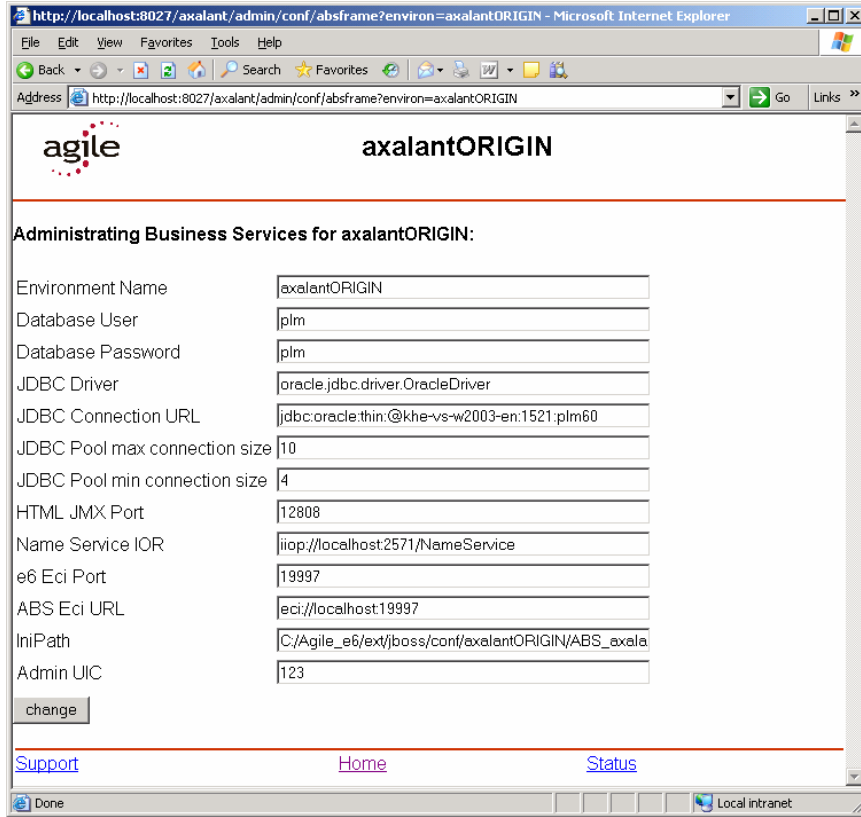
4. Edit the page to update the Agile e6 Business Service attributes, described in the following table, for your environment.

The Agile e6 Business Service component restarts automatically. This may take some minutes, the services is stopped and restarted.

> **Note:** To determine whether the Agile e6 Business Services started successfully, click the "Check Logfile" button or read the `business_services.log` file. This file is located in the directory
> `<InstallDir>/ext/jboss/conf/<EnvironmentName>/`

- *<InstallDir>,* substitute the name of the directory where Agile e6 is installed.
- *<EnvironmentName>*, substitute the name of the Agile e6 environment.

The following table provides explanations for the attributes you can set to configure the Agile e6 Business and Presentation Services.

Agile e6 Business Services Attribute	Description
Environment Name	The name of the environment for which you want to configure the Agile e6 Business and Presentation Services.
Database User	The name of the database user defined for the environment.
Database Password	The password of the database user defined for the environment.

Agile e6 Business Services Attribute	Description
JDBC Driver	The database driver class. This parameter is database-system dependent. Select the appropriate driver class for your database system. **Oracle:** oracle.jdbc.driver.OracleDriver **Microsoft SQL Server 2005:** com.microsoft.sqlserver.jdbc.SQLServerDriver
JDBC Connection URL	The database connection URL. This parameter is database-system dependent, and it will change automatically depending on the *JDBC Driver* parameter setting. **Oracle:** jdbc:oracle:thin:@khe-vs-w2003-en:1521:plm60 khe-vs-w2003-en: Database server name 1521: Oracle listener port plm60: Oracle Instance name **Microsoft SQL Server 2005:** jdbc:sqlserver:@khe-vs-w2003-en::1433;SelectMethod=cursor khe-vs-w2003-en: Database server name 1433: SQL Server listener port
JDBC Pool max connection size JDBC Pool min connection size	Defines the maximum and minimum numbers of connections. The JDBC Pool initializes MinSize connections and never drops below the specified number. On demand, the Pool will create up to the specified number of MaxSize connections. MinSize is the startup and "rest" state of the system. MaxSize is the maximum number of connections that will be created. This number should reflect the maximum number of concurrent Business Service requests, which should be less than the number of licensed users. As guidelines, choose MinSize of 5 and MaxSize as the greater of (MinSize*2) -or- (Number of Licensed users/10).
HTML JMX Port	Defines the port used as the HTML interface for dynamic administration of JBoss services. It allows you to start, stop and review all the mbeans in the server. Making any changes to the mbeans may result in unpredictable results. The default is *12808*. **Important:** The specified port must be unique, unused and secured.
Name Service IOR	Defines the communication port between the Agile Agile e6 Server and the Agile e6 Business and Presentation Services. **Important:** The specified port must be unique and unused.
e6 Eci Port	The port used for communication between the Workflow editor and the ABS ECI Server. This must be the same unique, unused port specified in the ABS Eci URL.

Agile e6 Business Services Attribute	Description
ABS Eci URL	Defines the communications between the Workflow editor and ABS ECI Server. The specified Port must be unused and unique!
IniPath	The path to the ABS_environment.ini file. **Important:** This field is not editable and the value should not be changed manually.
Admin UIC	As a standard user will not be able to handle general errors due to limited access rights, values for ADMIN_UIC must be entered! This admin user should be able to enter, change or delete person data. Also this person should be allowed to suspend and resume processes and to change resource entries in the activity list of the process. For further information refer to "privileges" in the Role Concept module. **Important:** The specified UIC must be the numeric part of the UIC and not the Username.

Starting and Stopping Agile e6 Business Services

When for example changing port settings, the Agile e6 Business Services needs to be stopped and restarted.

1. Connect to the Administration Server and open the **Administrate Agile e6** web page.

2. Click the link **Manage Existing Environments** and choose the environment you want to modify.

3. Click the link `STOP/START e6 Business Services`.

4. Click the `Start` or `Stop` button to start or stop the Agile e6 Business Services for the selected environment.

Deleting Agile e6 Environments

Complete the following steps to delete an existing Agile e6 environment.

1. Connect to the Administration Server and open the **Administrate Agile e6** web page
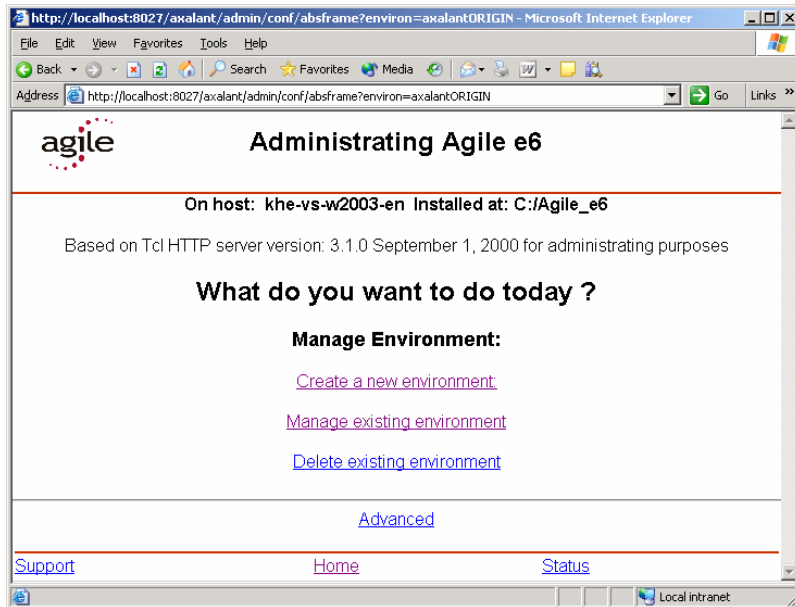
2. Click the link **Delete existing environment**.
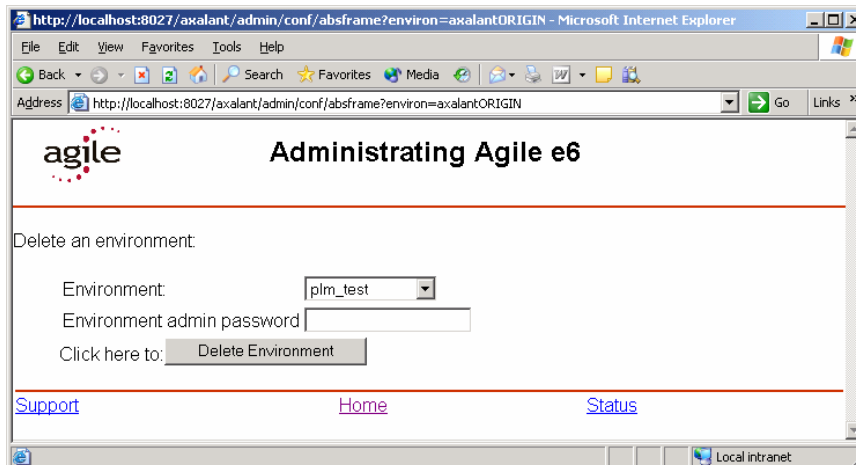
3. Select the name of the environment you want to delete.

4. Enter the administration password for the selected environment. If you cannot remember the password, it can be retrieved from the environment configuration file.

init/<env name>.edb:

…
[General]
AdminPwd=<password>
…

5. Click **Delete Environment**.

Checking Environment Configuration Files

All modifications of the environment settings made with the Administration Server are written to the corresponding environment file in `<InstallDir>/init/<environment.edb>` (for example, `Agile_e6/init/axalantORIGIN.edb`).

After a successful installation, the setup tool replaces variables such as `<InstallDir>` with your installation path.

Monitoring Agile e6 Status

The Agile e6 Administration Server can be used to monitor the status of your Agile e6 system.

1. Connect to the Administration Server and open the **Administrate Agile e6** web page
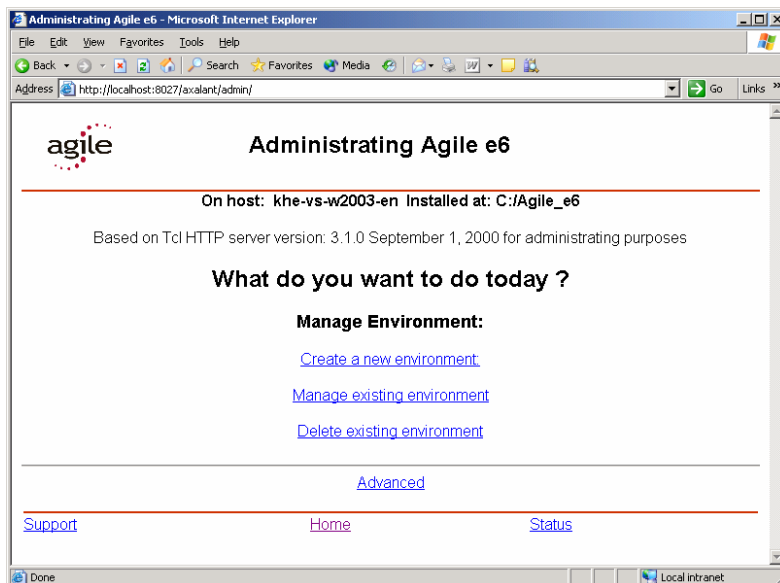
2. Select the **Advanced** option.

You can now monitor the Agile e6 Processes and the check the status of the Licenses.
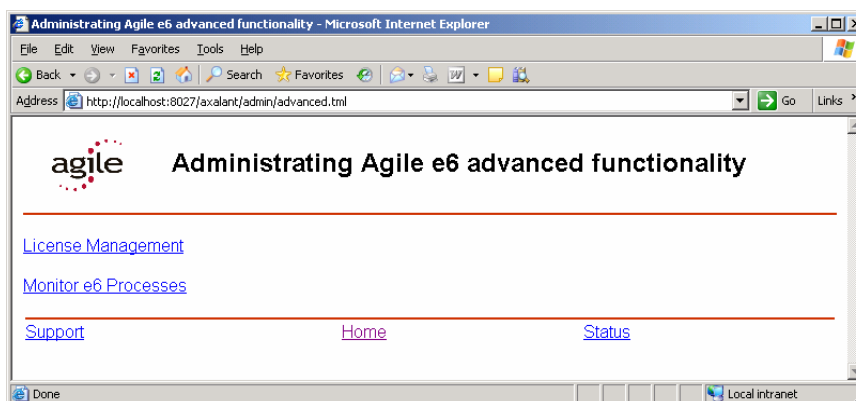
Monitoring Agile e6 Processes

If you choose 'Monitor e6 Processes' the Administration Server checks the status of the different server processes of the Agile e6 system.

It also shows status of the port numbers used by the Administration Server itself and the RPC status of the Agile e6 File Service and the Agile e6 daemon.

> **Note:**   You can check all running processes, all used TCP ports and all RPC numbers in use if you click 'Details' in the respective section.
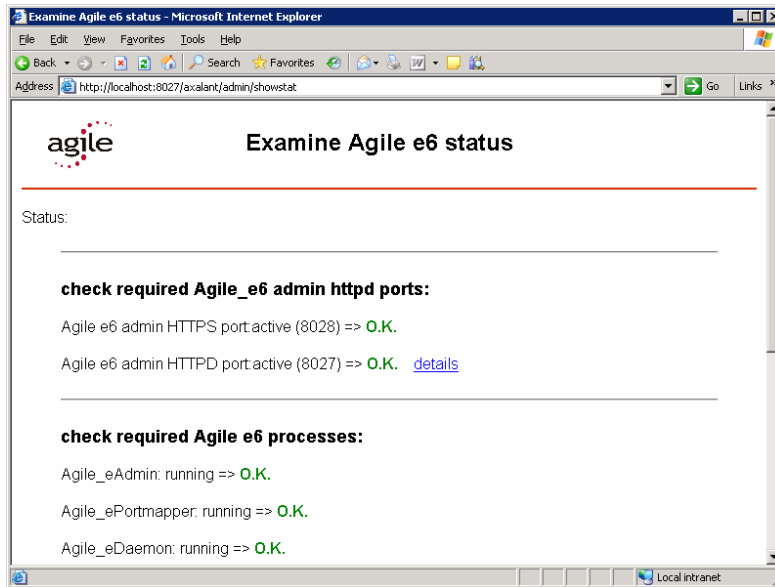
Check Licenses Status

To check the status of the licenses used by the Agile e6 system select 'License Management'.

1. Enter the Server name where the FELICS License Server is running and the password for the FELICS Server.
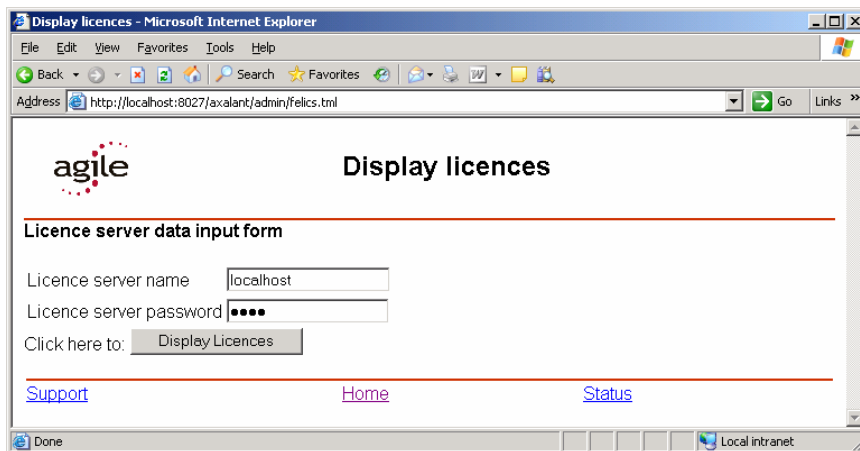
This password is set during the installation of the FELICS Server and can be changed using the FELICS tools. For additional information, refer to the FELICS documentation. .

If you have changed the port number of FELICS server during the installation, which is by default '12345', add the port number to the server name:

<hostname>:<port number>

An overview of the licenses in use is displayed:
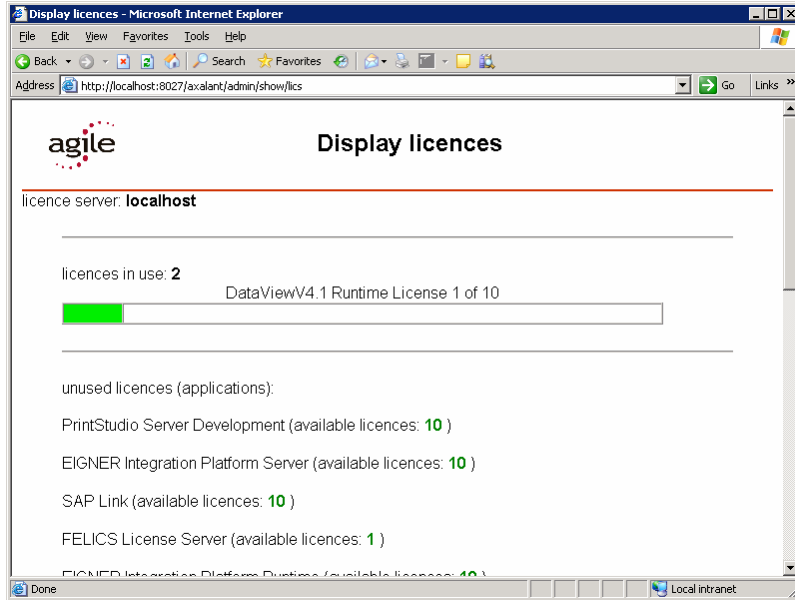
Default port numbers used by Agile e6

The following TCP/IP ports and RPC numbers are used by Agile e6:

HTTP Admin Server	(HTTP) 8027	
	(HTTPS) 8028	
File Server	File Service RPC 804257546	
	Web File Service 8088	
Web Presentation Service	Ajp12 Port	7077
	Shutdown Port	8005
	Web Client	8088
	Web Report Service	8088
DataView Daemon RPC	552000566	
Java Daemon	16077	
	Admin Port	16078
ECI Client Port	4444	
Business Service	Name Service	2571

| | JMX   12808 |
| | e6 Eci Port   19997 |

Chapter 3

Administrating the Web Presentation Service

If you installed the Agile e6 Business and Presentation Services during the Agile e6 installation (by selecting the *WEB and Workflow services* installation option), you can use the Web Presentation Service to give users access to the Agile e6functionality through their web browsers.

To administrate the Web Presentation Service, you use the Agile e6 Administration Server. You can perform the following tasks:

❑   Create a Web Presentation Service environment on the Agile e6 Server machine or on a remote machine

❑   Configure or delete an existing Web Presentation Service environment

❑   Start and stop the Web Presentation Service

Creating Web Presentation Service Environments

A Web Presentation Service environment defines a particular software configuration that enables communications between web browsers and an Agile e6 Server. Each Web Presentation Service environment can connect to only one Agile e6 Server.

Complete the following steps to create a Web Presentation Service environment.

1.   Connect to the Administration Server and open the Administrate the Web Presentation Service web page.

2.   Click the link **Create a new environment**.

This opens the page to define the new Web Presentation Service environment.

The definition will specify the communications ports used by components such as the Java daemon and web browsers.
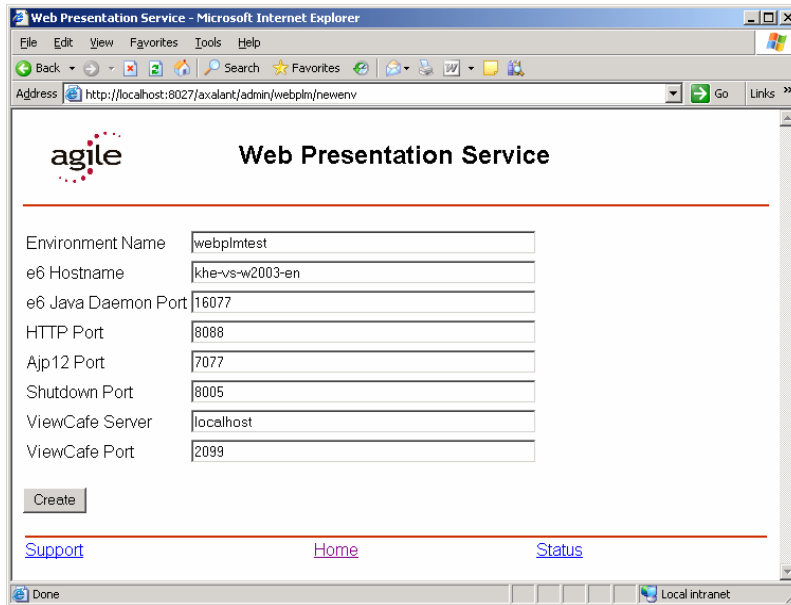
3.   Enter parameters in the text fields to define web access for the new environment.

The following table describes the web access parameters.

Web Access Parameter	Description
Environment name	The name of the new Web Presentation Service environment. This name is unrelated to your Agile e6 environment name. It is used only to manage the Web Presentation Service environment.
e6 Hostname	The name of the machine on which your Agile e6 Server resides.
e6 Java Daemon Port	The port on which the Java Daemon listens for a connect request. The default is *16077*.
HTTP port	The port which calls the Web Presentation Service via a web browser. The default is *8088*. **Important:** The specified port must be unique and unused.
Ajp12 port	An internal port used by the Tomcat Servlet Engine. The Default is *7077*. **Important:** The specified port must be unique and unused.
Shutdown Port	An internal port used by the Tomcat server to shut it down. The Default is *8005*. **Important:** The specified port must be unique and unused.
View Café Server	The Hostname where the ViewCafé is running.
View Café Port	The Port number where the ViewCafé Server is running.

4.   Enter all information and click `Create.`

The new Web Presentation Service environment is created and the Agile e6 Web Presentation Server starts automatically. This may take some minutes.
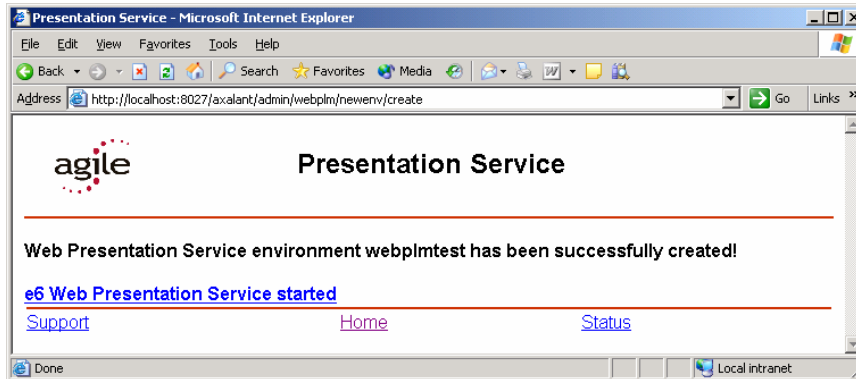
You can confirm that the Web Presentation Server started successfully by checking the `web_presentation.log` file in the directory
`<InstallDir>/epclt/<WebEnvironment>/`

- *<InstallDir>* directory name where Agile e6 is installed.
- *<WebEnvironment>* name of the Web Presentation Service environment.

There will be an initial use of memory of up to 40 MB at startup and approximately 128 MB during use.

5. Start the Agile e6 Web Client using Internet Explorer 6.0, or Mozilla 1.7.x at the following address.

   You might have to add the Web Presentation Server to the trusted websites setting of your browser:

   http://localhost:HTTPPort

   - *localhost* is the machine name of the Agile e6 Server
   - *HTTPPort* is the port specified in the HTTP Port attribute when you created the Web Presentation Server environment.

   For example, if the default parameter for HTTP port (8088) was used to create the Web Presentation Service environment on a Agile e6 Server named *myPLMserver*, the URL will look like this:

   http://myPLMserver:8088

Creating Remote Web Presentation Service Environments

To reduce the load on the Agile e6 Server, you can run the Web Presentation Service on a separate machine from the Agile e6 Server. Because the FELICS license software, File Service and database system are not required on the remote machine, you will need to install only the Agile e6 Server software.

1. Install the Server software and the Agile e6 Business and Presentation Services on the machine where you want to run the Web Presentation Service.

   Follow the instructions in the installation guide for your platform.

On the Custom Setup screen, you'll need to select only the "Server" and "WEB and Workflow services" installation options.

2. When the installation is complete, create a Web Presentation Service environment and set its Agile e6 host name to the name of the machine hosting the Agile e6 Server.

Refer to Section *Creating Web Presentation Service Environments* for instructions. Note that a Web Presentation Service environment can connect to only one Agile e6 Server.

3. To run the Web Client in the new environment, point your browser to:

http://<WebPresentationHost>:8088/

For <*WebPresentationHost*>, substitute the hostname of the machine where the Web Presentation Service is installed.

Note: On Windows, resources can be saved by disabling automatic startup for all Agile e6 services, with the exception of the Agile e6 Admin service. To disable a service, open the Control Panel and double-click Administration Tools and then Services. Right-click the service name, click Stop, and then click Properties and set Startup type to "Manual."

Note: If the machine hosting the Web Presentation Service is rebooted, you'll need to use the Administration Server to restart the service. Refer to Section Starting and Stopping the Web Presentation Service for instructions.

Note: You might have to add the machine hosting the Web Presentation to the trusted web sites in your browser settings.

Configuring Web Presentation Service Environments

Complete the following steps to configure your Web Presentation Service environments.

1. Connect to the Administration Server and open the web page used to administrate the Web Presentation Service, as described in Section *Connecting to the Administration Server*.

2. Click the link Manage existing environment.

This opens a web page for adapting your environment.
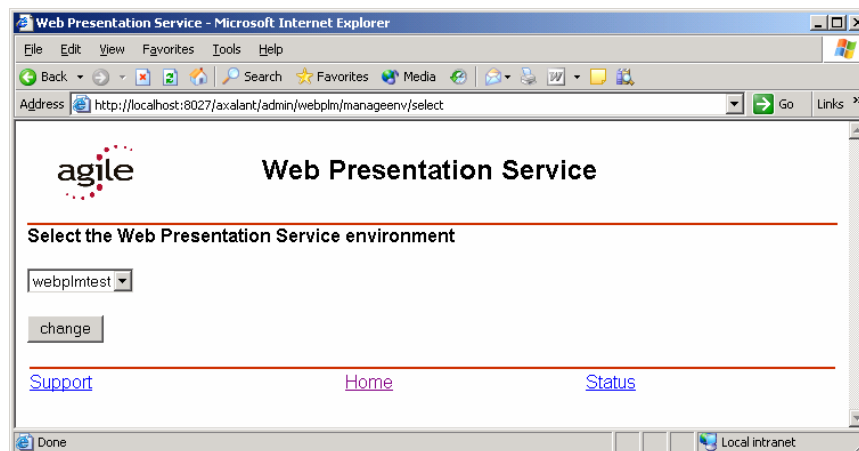
Any previously created environments (for example, `webplmtest`) should appear in the list of existing environments.

3. Select the environment you want to adapt and click **Change**.

This makes the attributes of the selected Web Presentation Service available for editing.
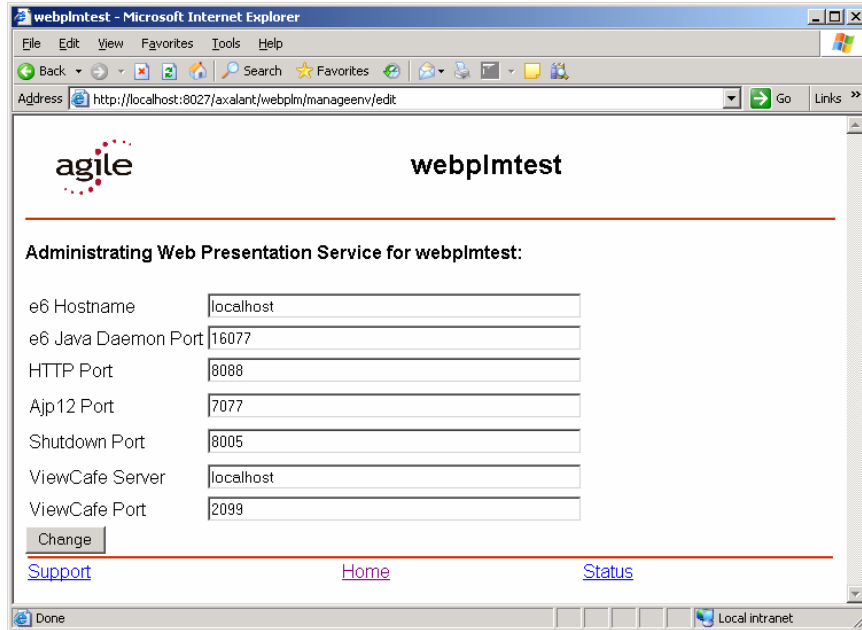
The following table describes the attributes you can modify.

Attribute	Description
e6 Hostname	The name of the machine on which your Agile e6 Server resides.
e6 Java Daemon Port	The port on which the Java Daemon listens for a connect request. The default is *16077*.
HTTP port	The port calling the Web Presentation Service via a web browser. **Important:** The specified port must be unique and unused.
Ajp12 port	An internal port used by the Tomcat servlet engine. **Important:** The specified port must be unique and unused.
Shutdown Port	An internal port used by the Tomcat server to shut it down. **Important:** The specified port must be unique and unused.
ViewCafé Server	The Hostname where the ViewCafé is running.
ViewCafé Port	The Port number where the ViewCafé Server is running.

4. To modify your environment, click **Change**.

The Web Presentation Server restarts automatically. This may take some minutes.
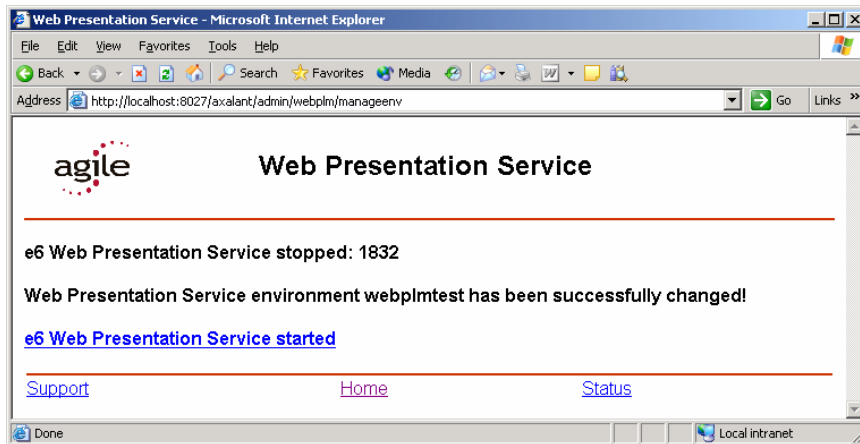
To confirm that the server started successfully, check the `web_presentation.log` file in the following directory:

<InstallDir>/epclt/<WebEnvironment>

For *<InstallDir>,* substitute the name of the directory where Agile e6 is installed. For *<WebEnvironment>,* substitute the name of the Web Presentation Service environment.

Deleting Web Presentation Service Environments

Complete the following steps to delete a Web Presentation Service environment.

1. Connect to the Administration Server and open the Web Presentation Service web page. .

2. Click the link **Manage existing environment**.
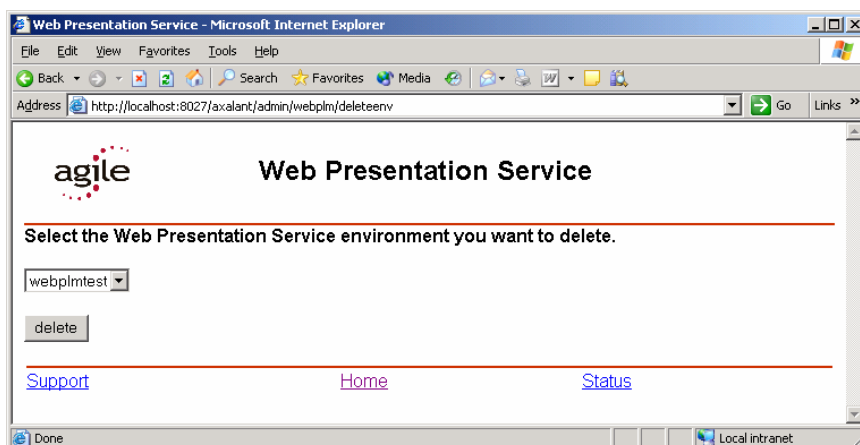
3. Select the name of the environment you want to delete.
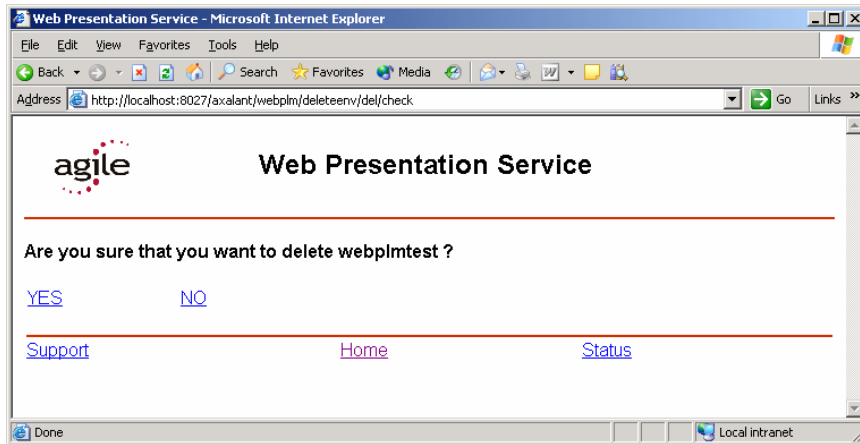
4. Click **YES** to delete the environment.

If you do not want to modify the environment click **NO.**

Starting and Stopping the Web Presentation Service

At times it will be necessary to stop and start the Web Presentation Service through the Administration Server. For example, you'll need to restart the service after the host machine is rebooted, and you'll need to stop and restart the service to change the ports it uses.

1. Connect to the Administration Server and open the web page used to administrate the Web Presentation Service.

2. Click the link START/STOP existing environment.
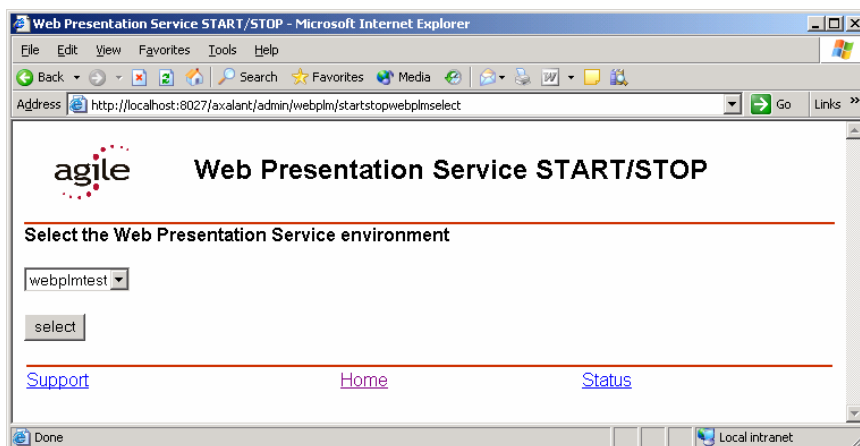
3. Select the name of the environment for which you want to start or stop the Web Presentation Service, and then click **select**.

If you try to stop a service that is not running, you will see messages indicating that the port is not in use.

4. Click **Start** or **Stop** to start or stop the service.

Java Client with WebStart

WebStart is a deployment technology provided by Sun. With Agile e6.0 Agile supports this technology for the deployment of the Agile e6 Java Client. Currently Tomcat and the Web Presentation Service is used to implement WebStart.

To use Web Start, the Java Runtime Environment 1.4.2 is required on the Client Machine. and the WebStart feature provided by the JRE must be installed.

For more information about the Sun Java WebStart see
http://java.sun.com/products/javawebstart/

How to use the Agile e6 Java Client for WebStart

1. To use this feature, start the webplmtest environment, which is created during the installation, or create a new Web Presentation environment.

2. After Tomcat is running, start a web browser, and open the webpage at

    http://<WebPresentationHost>:<web environment portnumber>/Jacc/

    Replace <*WebPresentationHost*> with the name of the computer where the Web Presentation Service is running and replace <*web environment portnumber*> with the port number of the Web Presentation Service.

    For example: http://localhost:8088/Jacc/
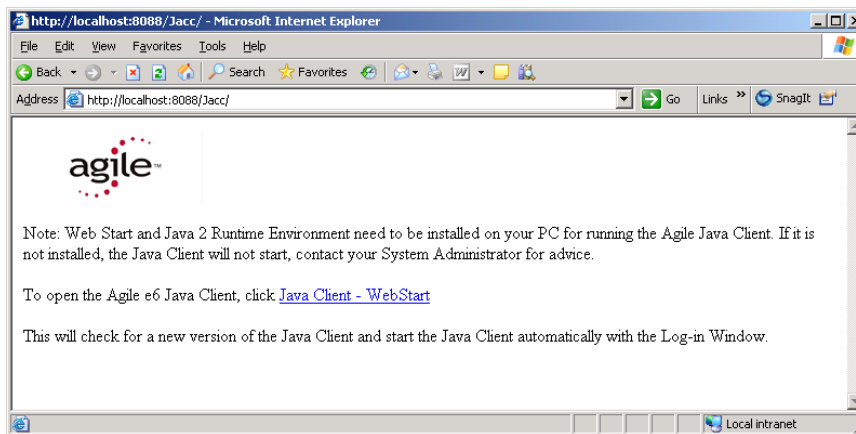
3. Click on the *Java Client – WebStart* link which starts the Java Web Start download for the Agile e6 Java Client
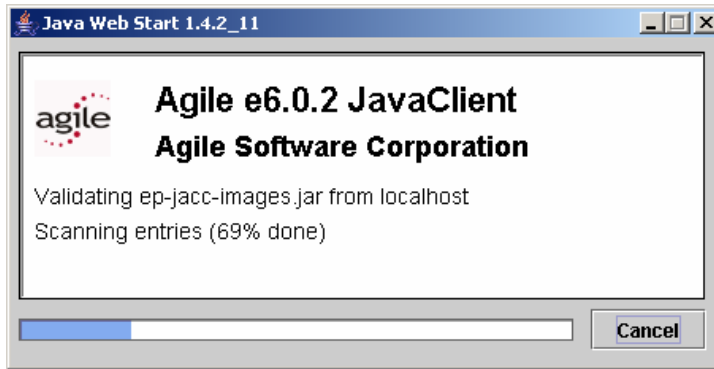
After the download you will get some confirmation dialog boxes (provided by WebStart).
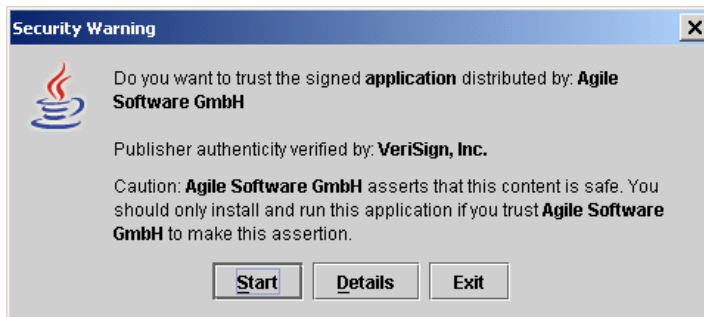
4. Click the *Start* Button to install the application.
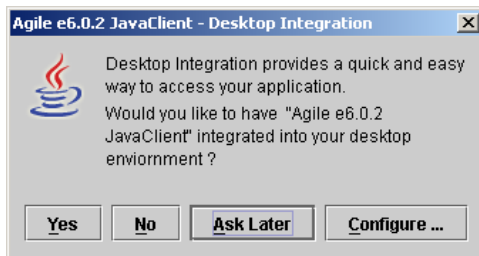
5. If you want to integrate the entry in the Startup Menu and on the Desktop for the current user, click **Yes.**

If not, click **No.**

> **Note:** It will be easier to start the Agile e6 Java Client, provided by the WebStart service, if you choice to integrate it into the desktop environment.

The Agile e6 Java Client will start

Re-Starting the Java Client for WebStart

The Web Start service provides two options to re-start the Agile e6 Java Client after having set it up as described above.

Run the WebStart Agile e6 Java Client from either the Desktop or the Startup Menu if you have chosen to integrate it into the desktop environment.

or

Start Java Web Start from the Desktop or the Startup Menu and select the Agile e6.0.2 JavaClient.
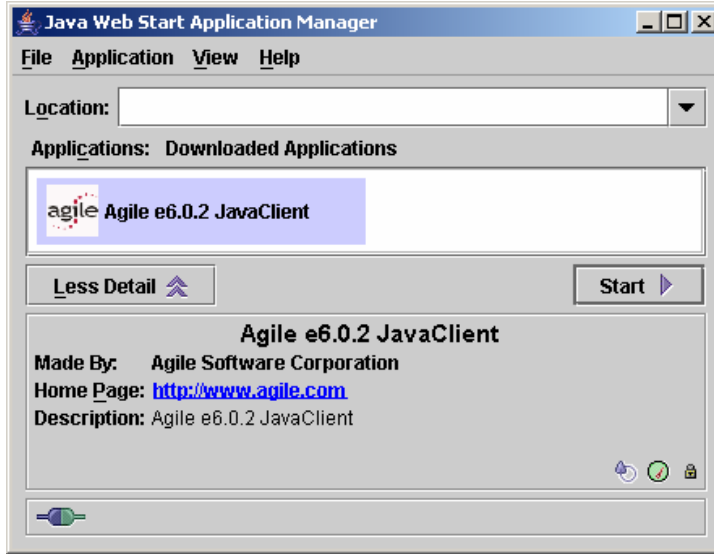
Configuring the FileService Vault for the Web Client

1. Start an Agile e6 client and login as a manager user (edbcusto, demoep_m).

2. Open Manager -> File Management -> Vaults.

3. Select the folder Web address.

4. Search for the FileService Vault that will be used by the Web Client.

5. Insert values for the following parameters:

Configuration parameter	Value
Protocol	http or https.
Host	Hostname for the machine on which the Web Presentation Server is running.
Port	Port number on which the Web Presentation Service is running. This differs depending on the usage of http or https.
Path	/FileService

Note: Setting the protocol to https requires changes that are described on the following pages.

Adding Data Security to the Web Presentation Service

Tomcat SSL

Concord Web Presentation Server uses Tomcat to serve web pages (JSPs and HTML). One feature of Tomcat, SSL (Secure Socket Layer), allows encrypted communication between a browser and a server through the HTTPS protocol. This document describes the steps necessary to configure Tomcat SSL for Concord Web Presentation.

Performance

Encrypting and decrypting messages with SSL requires extensive resources, therefore many sessions can degrade the performance of a web server. Various factors contribute to the overall performance of an SSL web server including CPU speed, number of simultaneous requests, size of messages, and amount of memory. Be aware that performance may suffer when running Tomcat SSL.

Agile e6 with Web Presentation Server

1. Install Agile e6 with Web Presentation Server.

    This will install the following components that are needed for Tomcat SSL:

    -   Web Presentation Server (webplm)
    -   Tomcat 5.0.28

    Additionally you need a Java Runtime Environment 1.4

Server Certificate

For testing purposes, you can generate your own certificate. For productive use, obtain a Server Certificate from a trusted source, such as Verisign or Thawte. If you want to secure more than one domain name get multiple certificates. Digital certificates are host and domain name specific, so that you will need as many certificates as you have domain names.

The following describe the steps needed to configure Tomcat SSL.

<ep_root> is defined as <ep_root> = Agile e6 installation directory.

1. This step is for testing purposes only. Skip to the next step for production systems.

    Generate Certificate by running the Java *keytool* utility that is included with every Java Runtime Environment installation.

    Replace *<keystore>* with the *keystore* attribute value defined in *server_web.xml* above. Use the password defined in the *keypass* attribute, and you do not need to sign the certificate.

    % $JAVA_HOME/bin/keytool -genkey -alias tomcat -keyalg RSA –keystore <keystore>

    In this example a digital certificate is generated with the alias *tomcat* using *RSA* algorithm and stored in the file *<keystore>*. RSA is required for Netscape and IE browsers.

2. This step required for production systems after you have obtained a digital certificate from a trusted source.

    Import Certificate

Use the *keytool* utility to import a certificate obtained from a trusted source. The following example imports a certificate file *CERT.pem* to the file *<keystore>*. Use the *keystore* attribute from *server_web.xml* defined above.

% $JAVA_HOME/bin/keytool -import -v -trustcacerts -alias tomcat -file CERT.pem –keystore <keystore>

3. Edit <ep_root>/epclt/webplm/conf/server.xml by adding or uncommenting the following sample XML snippet:

<-- Define a SSL Coyote HTTP/1.1 Connector on port 8443 -->

<Connector className="org.apache.coyote.tomcat5.CoyoteConnector"

      port="8443"

      keystoreFile="*<ep_root>/epcltwebplm/conf/.keystore*"

      keystorePass="changeit"

      minProcessors="5"

      maxProcessors="75"

      enableLookups="true"

      disableUploadTimeout="true"

      acceptCount="100"

      debug="0"

      scheme="https"

      secure="true";

      clientAuth="false"

      sslProtocol="TLS"/>

In this example the keystore is the file *<ep_root>/epcltwebplm/conf/.keystore* with the password *changeit*.

4. Restart Tomcat

% cd <ep_root>/epclt/webplm

% ./start_web.sh stop

% ./start_web.sh

For further information see http://jakarta.apache.org/tomcat/tomcat-5.0-doc/ssl-howto.html

Setting the HTTPS Protocol for FileService Support

The Web Presentation Service must be configured to use the same Internet protocol—either HTTP or HTTPS—to communicate with both client browsers and the Agile e6 File Service (FMS). As part of configuring SSL support in the Web Presentation Service, you must set the HTTPS protocol for FMS support.

To switch from the default HTTP protocol to HTTPS for the FMS data URL, complete the following steps:

1. Open the properties file for the Web Presentation Service:

   *<InstallDir>/*epclt/*<WebPresentationEnv>*/shared/classes/webplm.properties

2. Add the following configuration key:

   axalant.web.fmsDataUrl=https*://<Server Name>*:*<HTTPS Port>*/FileService/data

   For <Server Name>, substitute the name of the machine on which the Web Presentation
   Service is running. For <HTTPS Port>, substitute the port number of the Web Presentation
   Service.

3. Save the file.

Chapter 4

Setting up the Online Help

For Agile e6, two types of online documentation are available:

❑   Online Help for all Agile e6 features is available in the PC Client. Because of restrictions caused by the Microsoft HTML Help format, this Help is available only on Windows computers running Internet Explorer 6.0 or later.

❑   Online Help for Web Client and Java Client needs to be setup separately. Note that this Online Help does not provide a fulltext search.

Setting up the PC Client

The Online Help for the PC Client is installed together with the client software. No special setup is required.

If you want to use the HTML-based help (Java and Web Client) also in the PC Client, you need to do the following:

1.   Right-click, select *Open > System > Defaults*, search for the variable `EDB-HLP-TYPE`, and change its value from `MSH` to `HTTP` to activate the use of the http protocol.

As this variable is optional, it might not exist. Create the variable `EDB-HLP-TYPE` with the type String.

2.   Proceed as described below - unzip the file and set the respective defaults.

Setting up the Web and Java Client

To make context-sensitive Help for masks, fields, menus, and userexits available in the Web and Java Client, complete the following steps:

1.   Change to one of the following directories:

- **English:** *<InstallDir>*/axalant/htd/htdocs/axalant/doc_ep/eng/
- **German:** *<InstallDir>*/axalant/htd/htdocs/axalant/doc_ep/ger/

2.   Extract the file **hlp_e6.zip** in that directory.

> **Note:**   The zip file is at the moment only available in English.
> Copy the file **hlp_e6.zip** from the "eng" directory to the "ger" directory and extract it there if the dump language is set to German.

3.   Log in as a manager user (edbcusto, demoep_m).

4.   Select *System > Other Parameters*.

5.   In the configuration mask, search for `Rubric EDB-HLP` and select the folder `Configuration parameter`.

6.   Set the documentation root `EDB-HLP-ROOT` to:

http://<plm server name>:<admin httpd port>/axalant/

The program adds `/doc_ep/eng/` or `/doc_ep/ger/`, depending on which language is active, followed by the index file name index.html.

❑ English:
http://<plm server name>:<admin http port>/axalant/doc_ep/eng/index.html

❑ German:
http://<plm server name>:<admin http port>/axalant/doc_ep/ger/index.html

On UNIX Systems, Agile e6 starts Mozilla as a default. If the browser is not defined, follow the steps below:

1. Select *Manager > External Applications* to specify different browsers on different operating systems and client nodes.

This is where the default browsers for each available UNIX System are defined. (For Microsoft Windows, the default system HTML browser is used.)

Node	File Type	Mode	OS	Command
-	-	E	intel-ms-nt5.0	cmd.exe /c start "axalant" "%s"
-	-	O	intel-ms-nt5.0	%ep_root%\axalant\bin\intel-ms-nt5.0\launch.exe
-	-	V	IE-6.0	(none)
-	-	V	Mozilla-1.7	(none)
-	-	V	intel-ms-nt5.0	cmd.exe /c start "axalant" "%s"
-	htm	V	intel-ms-nt5.0	cmd.exe /c start "axalant" "%s"
-	html	H	hppa-hp-hpux11.11	mozilla
-	html	H	ia32-linux-sles9	mozilla
-	html	H	intel-ms-nt5.0	launch
-	html	H	rs6000-ibm-aix5.2	mozilla
-	html	H	sparc-sun-solaris9	mozilla
-	html	V	intel-ms-nt5.0	cmd.exe /c start "axalant" "%s"
-	jt	V	intel-ms-nt5.0	cmd.exe /c start %s
-	wfledt	V	hppa-hp-hpux11.11	{JAVA_HOME}/bin/java %s
-	wfledt	V	ia32-linux-sles9	{JAVA_HOME}/bin/java %s
-	wfledt	V	intel-ms-nt5.0	{JAVA_HOME}\bin\javaw %s
-	wfledt	V	rs6000-ibm-aix5.2	{JAVA_HOME}/bin/java %s
-	wfledt	V	sparc-sun-solaris9	{JAVA_HOME}/bin/java %s
-	wfledtcon	V	intel-ms-nt5.0	{JAVA_HOME}\bin\java %s
-	zip	U	intel-ms-nt5.0	unzip -o "%s" -d {TMP}

2. Copy the line for your hardware architecture and insert the hostname and browser name.

Note: Note: Make sure that all of the following are true:

❑ File type is equal to *html*

❑ Mode is equal to *H* (help).

❑ "-" is a wildcard and means every possible value (like *).

Chapter 5

Using start and stop scripts

UNIX

axalant/scripts:

Script	Description
axalant_srv	Start script for the Agile e6 server processes used by the Java and DataView daemon. Script to set the axalant shell environment.
dmn_start	Startup the DataView daemon
ep_get_mach	Return the machine string used by the installation
http_start	Starts the Agile e6 Admin Service
jacc	Starts the Agile e6 Java Client
java_dmn	Start script of the Agile e6 Java Daemon
PS_<web env>.sh	Start and Stop the Presentation Service (tomcat) for the corresponding web environment
BS_<env name>.sh	Start and stop the Business Service (JBoss) for the corresponding Agile e6 environment

Windows

axalant/cmd:

Script	Description
axalant_srv.cmd	Start script for the Agile e6 server processes used by the Java and DataView daemon. With argument ENV the script sets the axalant shell environment. The tablespace names are set to default values.
jacc.cmd	Starts the Agile e6 Java Client
jade.bat	Start script for Agile e6 Java Daemon
oracleinstall.cmd	Starts the automate Oracle installation
plm.cmd	Startup the Agile e6 Windows Client

Script	Description
PS_<web env>.bat	Start and Stop the Presentation Service (tomcat) for the corresponding web environment. Register and unregister Windows service entry.
BS_<env name>.bat	Start and Stop the Business Service (JBoss) for the corresponding Agile e6 environment. Register and unregister Windows service entry.

Before using the start scripts, test the service with the admin server. If the service starts up without an error, use the start and stop scripts to run the services.

If you run the services with these scripts the admin server can no longer attach the services.

For each Agile e6 or Web environment as start script is created:

Windows:

Axalant\cmd\PS_<web env>.bat (Presentation Service tomcat)

Axalant\cmd\BS_<env name>.bat (Business Service Jboss)

Unix:

Axalant/scripts/PS_<web env>.sh (Presentation Service tomcat)

Axalant/scripts/BS_<env name>.sh (Business Service Jboss)

Start these scripts to see the command options.

You can use the Windows scripts to register a Windows Service.

Default user axalantrt with default password (4eigner:plm) is used. Please adapt the password of the service after registration.

Chapter 6

Office Suite Administration

Requirements

For a complete and most current list of all officially supported platforms, please visit the Platform Support page on our website at http://eignersupport.agilesoft.com/index.asp (you will need a password to enter the support website).

Installation

Office Suite is part of the standard Agile e6 version as shipped on the Agile e6 DVD. It is not necessary to install any files or make any changes in the Agile e6 dump.

To use Office Suite you have to insert the appropriate license key into your FELICS license management system

Basic Server Configuration

Configuring Office Suite Settings

1. Start your application and login as manager user

2. Open System -> Office Suite -> Configuration and insert values for the following parameters:

Configuration parameter	Value
GDM_SAV	Valid secure area for your office files.
GDM_SYS_GRP	Name of group that is allowed to define new templates.
GDM_SYS_GRP_1	Name of group that is allowed to define new file types in Office Suite.
GDM_SRC	Working directory for check-in and check-out. This is a client related definition. Whether you use the same directory on every client or you define different GDM_SRC parameters (one for each client).
GDM_SRC_CHK_OUT	Default directory for check-out. Agile recommends to set GDM_SRC_CHK_OUT to the same value like GDM_SRC
GDM_ARC_NOD	Name of dedicated client to convert native data into PDF. This is an optional function.

Note: The standard strategy is to check-out all files into the controlled folder. This guarantees automatic check-in after each file modification.

Note: The precondition for this strategy is that GDM_SRC_CHK_OUT
=*GDM_SRC*

Note: It is essential, that the controlled folder, defined by GDM_SRC is a folder
exclusive for Office Suite purpose. No other files or folders must be stored in
this directory. Manual deletion of files while Agile e6 is not running can cause
an automatic start of Agile e6.

Note: All files that occur in this folder are automatically controlled by the Fileguard
process except for the following: MS Word temporary files (~<name>.doc)
MS Word backup files (<name>.wbk)

Note: These are the minimum settings for a proper function. Other settings are
possible. Please check the manager documentation.

Installation of Optional Features

Installing the Full Text Server

Office Suite offers a full text retrieval capability for text based document files. If this feature is
switched on for a specific document type, an index file is created during each check-in task. These
files are stored in *Agile_e6\officesuite\index*. A batch process is necessary to manage the index table
in Agile e6. This process reads incoming files in the index directory and updates the index table.

This batch process must run on the application server. If multiple application servers are used, it is
possible to install one batch process on each server.

The following tasks are necessary to set up the batch process:

Installing the Full Text Server on a Windows Server

1. Start Agile e6 and login as a manager user.

2. Insert a new user (default name *office-batch*) and assign this user to the group EDB. Don't set
   a password!

3. Go to *Agile_e6\officesuite\server\cmd* in your file system

4. Edit the file *index_srv_start.cmd*:

   Modify the three variables (AXA_ROOT, OFFICE_ENV, INDEX_USER) according to the
   description in the cmd-file.

5. Edit the file index_srv_stop.cmd:

   Modify the variable (AXA_ROOT) according to the description in the cmd-file.

6. Start the script inst_index_srv.cmd <axalant-root>

   With *axalant_root* = root path to your Agile e6 installation (i.e. D:\ Agile_e6)

   This script will install two services:

   - Agile_eIndex   (Starts the index server batch process)
   - Agile_eIndexStop   (Stops the index server batch process)

7. Adjust the service properties

   To adjust the service properties, open the service list on your host and select the property
   window for these services, Set the following properties:

- Agile_eIndex:Start type *Automatically* so that this services is automatically started at boot time.

- Agile_eIndexStop   Start type *Manual*.

The Agile eIndex service starts your index server batch process at boot time of your application server. If you want to stop the batch process, start the service Agile_eIndexStop manually. This service will stop the batch process and will also stop the service Agile_eIndex.

> **Note:**   To install the service we use products that are property of Microsoft Corporation (instsrv, srvany) and are subject of Microsoft license policy.

Installing the Full Text Server on a UNIX Server

1. Start Agile e6 and login as a manager user.

2. Insert a new user (default name *office-batch*) and assign this user to the group EDB. Don't set a password!

3. Go to *Agile_e6/officesuite/server/scripts* in your file system

4. Edit the file *index_srv_start*:

   Modify the three variables (ep_root, OFFICE_ENV, INDEX_USER) according to the description in the cmd-file.

5. Edit the file *index_srv_stop*:

   Modify the variable (AXA_ROOT) according to the description in the cmd-file.

6. Copy the scripts to the appropriate rc Environment on your server.

   Now the index server is automatically started during boot time and stopped if the server is shut down.

Installing the PDF Conversion

Office Suite supports a PDF conversion for Office files that can be launched from within an Agile e6 release procedure.

To implement this function into a release procedure, add the post action trigger GdmBatch/Archiv to the lifecycle transition that should initiate the PDF conversion.

The PDF conversion can only be performed on a Windows client. It is necessary to have a dedicated client because the conversion process performs output on the screen.

Prerequisites

The following prerequisites are necessary for the PDF conversion client:

❑   Dedicated PC.

❑   Agile e6 client is installed.

❑   Office Suite client is installed.

❑   The full MS Office package is installed.

❑   Acrobat Distiller is installed (Version 4 or higher) **is installed.**

In addition, the following settings are necessary:

❑   Office Suite configuration parameter GDM_ARC_NOD is set.

❑ The PDF-option in Agile e6 is set for all wanted file types

(See System -> Office Suite -> FileTtypes)

❑ The distiller printer must be selected in Agile e6

(See Manager -> Office Suite -> PDF Printer)

❑ A transition of the release procedure that is used for Office documents has the appropriate trigger configured.

The PDF printer will be set to the default printer on this host by Agile e6. This setting should not be changed because it is mandatory for the correct function of this option.

It is necessary to make the following settings in your Acrobat Distiller software:

❑ The PDF Viewer should NOT be started after creation of the PDF file

❑ With Acrobat Distiller 5,6 and 7 make sure, that a log file is created. This option is controlled via the Acrobat Distiller printer. This is important because Office Suite waits for the log file before the pdf file is checked in! Open the properties window of your Acrobat Distiller printer, push the button 'Printer Settings' and select the tab 'Adobe PDF settings'. Here make sure that the option 'Delete protocol files' is deselected.

❑ With Acrobat Distiller 5,6 and 7, modify the default output path for the PDF files. The default path points to the desktop which causes problems during check-in. The path can be modified via the Acrobat Distiller printer. Open the properties window of your Acrobat Distiller printer and select the ports tab. Insert a new PDF Port with a different path and delete the old one.

Installation Steps

1. Start Agile e6 and login as a manager user.

2. Insert a new user (default name *office-batch*) and assign this user to an appropriate group

   Note: It has to be assured that this user has sufficient access rights to check in the pdf files. It is possible to use for this batch process the same user as for the index batch process.

3. Go to *Agile_e6\axalant\bin\intel-ms-nt5.0* in your application server file system and copy the file *officesuitebatch.exe* to your dedicated batch client.

Configuring the Batch Client

1. Start OfficeSuiteBatch.exe
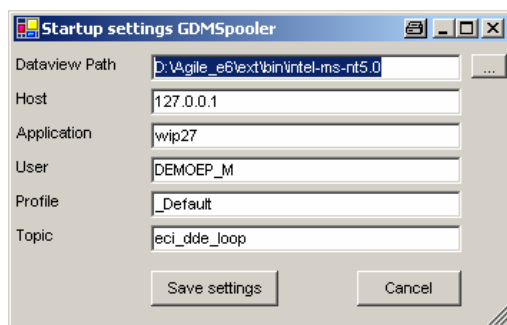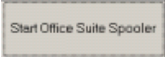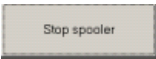
If you start OfficeSuiteBatch.exe for the first time, this configuration mask is presented. Please fill out the fields with the appropriate values of the application environment you want to use.

2. To reconfigure your settings, push the button . You will then get the configuration mask again.

Starting and Stopping the Batch Client

The batch client can be started by pushing the button	
It can be stopped by pushing the button	
To close the program, please push the button	

The spooler can also be controlled by batch commands:

Start the spooler with *OfficeSuiteBatch –start*

Stop the spooler with *OfficeSuiteBatch -stop*

Client Installation

The Office Suite client is installed using the Agile e6 Setup program.

> **Note:** If you have a centralized client installation it is necessary to register Office Suite specific libraries for each client.

Verifying the Installation

During the client installation several files are copied into the client directory structure. Some of these files are registered by the installation process to work properly.

The installation task creates a log file (os_client2000.log for Office 2000/XP) in the Agile e6 root directory on your client. This file can be checked for possible installation problems.

In addition, a test program is installed (Agile_e6\axalant\bin\intel-ms-nt5.0\ CheckDll.exe). This program checks all application dlls on a module level. Also important DataView files are checked. Depending on the patch, the version, and the registration information, Agile Support can look for possible installation errors.

Customizing Office Suite

Check the online documentation for customizing Office Suite.

Office Suite Configuration

If you work with more than one Office document type please, check the following settings in your Office Suite configuration:

GDM_CHK_TYP defines if a certain file type (i.e. Word) is allowed to store in all document types or only in one particular type. Is this parameter set to YES, each file type can only be stored in one exclusive document type. To define the document type to be used only for this file type, insert in the manager menu "file types" into the field "doc. type" the file suffix. If you want to allow storage of all file types into a document type set this field to "ALL" (this is the default). Also set GDM_CHK_TYP to NO (this is the default).
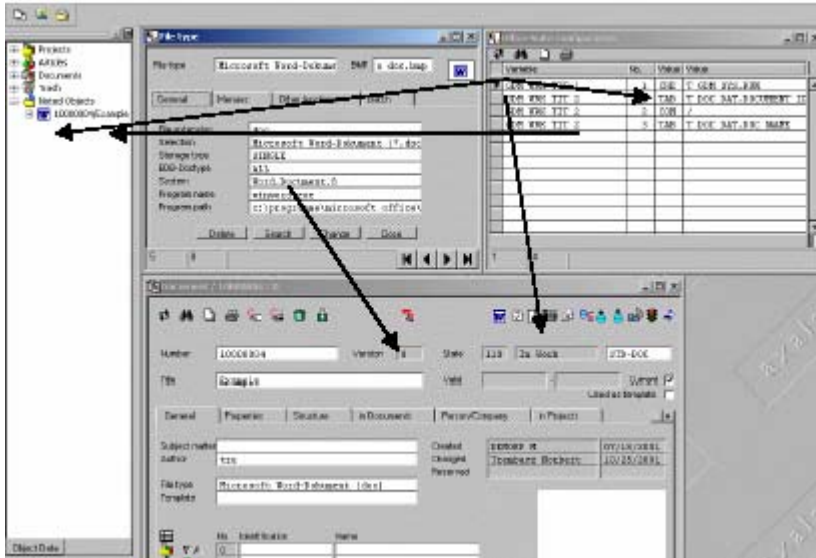
In addition the following parameters have to be defined for each new document type:

Customizing Office Suite

GDM_WRK_TIT_1 1 CRE T_GDM_SYS.RUN OBJ Check Entity
OFFICE_DOC GLOBAL

This defines the bitmap that is presented in the browser.

GDM_WRK_TIT_2 1 TAB T_DOC_DAT.DOCUMENT_ID OBJ Check Entity
OFFICE_DOC GLOBAL
GDM_WRK_TIT_2 2 COM / OBJ Check Entity
OFFICE_DOC GLOBAL
GDM_WRK_TIT_2 3 TAB T_DOC_DAT.DOC_NAME_ OBJ Check Entity
OFFICE_DOC GLOBAL

These settings define which meta data are presented in the browser.

Upgrading to Office Suite

If it is necessary to upgrade from older Office interfaces to Office Suite basically the customizing tasks are necessary.

Furthermore additional customizing or conversion tasks may be necessary. These tasks depend on the previous used Office interface.

However it is possible to migrate information created with older Office interfaces. The customer should be aware, that Office Suite may function completely different from the previous interface.

That makes it necessary to learn about the new functionality and features before starting the migration. This is the foundation for a successful implementation of Office Suite and helps the customer to use the new interface at best.

The general rebuild of a document type from any former Office interface to Office Suite should be executed in these major steps:

❑ Removal of functions, buttons, menus and user exits from the document masks/lists.

❑ Addition of necessary fields to the type table. Migration of information from old fields to new fields. Removal of no more used fields from master and type table.

❑ Addition of functions, buttons, menus and user exits that are necessary for Office Suite.

❑ Set up of the new configuration (basic configuration, template configuration).

❑ Deletion of all no more used tables, owned by the old interface.

Upgrade from GDM

Because GDM is the predecessor version of Office Suite, both data models don't differ very much. But however there are differences. The following chapters show these differences and describe necessary changes.

Because the GDM data model cannot be fully upgraded by the upgrade tool that is used to migrate from CADIM to Agile e6, it is necessary to delete the old data model before any upgrade tool task is started. During the upgrade process the new data model will be automatically inserted into the customer dump.

Mask Definitions

Before any upgrade is started, the mask definitions for the GDM document type(s) (EDB-DOC-GDM-TFR and EDB-DOC-GDM-TLI) should be copied to another name and extracted into a loader file. After the upgrade is done or the new Office Suite data model is loaded, these mask definitions can be replaced and customized.

Deleting the old Data Model

With the Agile e6 CD a SQL script is shipped that deletes the GDM data model completely (Agile_e6\axalant\db_util\oracle\sql\dtv_delete_gdm_data.sql or Agile_e6\axalant\db_util\msql\sql\dtv_delete_gdm_data.sql). Run this script to delete the old data model.

In addition the LogiView code must be deleted. To do this run the script lgv_gdm_del_lgv.sql

T_DOC_DAT / T_DOC_GDM

The constraint for the file type information has changed. In GDM the type field was in the type table (T_DOC_GDM.FILE_TYPE). It has now moved to the master table (T_DOC_DAT.GDM_FILE_TYPE). The content of the old table column has to be moved via SQL into the master table.

Other GDM specific fields that could be configured to the master or type table:

Parameter	Field in GDM	Field in OfficeSuite
GDM_DIR_PTH	T_DOC_GDM.DIRECTORY	T_DOC_DAT.CAX_FIL_PAT
GDM_LAY	T_DOC_GDM.TEMPLATE	T_DOC_DAT.GDM_TEMPLATE

GDM_LAY_FLD	T_DOC_GDM.IS_TPL	T_DOC_DAT.GDM_IS_TPL
GDM_PREVIEW	T_DOC_GDM.PREVIEW	not applicable
GDM_THUMBNAIL	T_DOC_GDM.THUMBNAIL	T_DOC_DAT.DOC_BLOB

If these fields are in the type table, please move the content via SQL to the corresponding fields in the master table.

If these fields are already configured to the master table, but with the old GDM name, please replace them by fields with the new names.

Templates

In GDM the template definition for meta data exchange was stored in T_GDM_ATT .

In Office Suite this information is stored in three different tables:

T_GDM_TPL defines the template names.

T_GDM_PRP defines all available properties.

T_GDM_TPL_PRP is the relationship table to assign properties to a template.

The information transfer from the old configuration table to the new structure should be done manually via the manager menus.

File Types

In the table T_GDM_SYS the following fields have changed its type from String to Logic:

T_GDM_SYS.THUMBNAIL create preview

T_GDM_SYS.KEYWORD create index

T_GDM_SYS.INT_COMPRESS compress (only structures)

T_GDM_SYS.BAT_ARCHIV create PDF file

Please, assure, that the field types are correct and check the field contents via the Office Suite manager menu.

Viewer Configuration

All viewer definitions are now defined in 'External Applications'. The old GDM definition in T_GDM_EXE is no more used.

Worklist / Noted Objects

The GDM worklist is replaced by the browser object 'Noted Objects'. The table to store the noted objects is T_GDM_MYDOC. The old table T_GDM_WRK is no more used.

Archive files

Archive files (PDF) are administered differently in Office Suite than in GDM. For Office Suite it is necessary to have a file relationship between the original file and the archive file with a special archive flag. For this reason a conversion is necessary for all documents that contain archive files.

For all documents with the storage type SINGLE which have two files assigned to, and one of them is of the file type PDF, the PDF file has to be related to the original file via T_FIL_STR with the attribute T_FIL_STR.GDM_TYPE = "ARCHIV". Agile support can make appropriate scripts available, if necessary.

Tables and Fields to be deleted

The following fields can be deleted after their content has been moved to the new fields if necessary:

T_DOC_GDM.FILE_TYPE
T_DOC_GDM.DIRECTORY
T_DOC_GDM.TEMPLATE
T_DOC_GDM.IS_TPL
T_DOC_GDM.PREVIEW
T_DOC_GDM.THUMBNAIL

The following tables can be deleted:

T_GDM_ARC
T_GDM_ARC_STR
T_GDM_IDX_APP
T_GDM_IDX_LNG
T_GDM_IDX_SYN
T_GDM_SPO
T_GDM_WRK

Chapter 7

Defined error messages and error codes edb_main

This document contains a list of all defined error messages and error codes for possible errors in edb_main.

Error Code Name	Error No	Error Message	Description	Solution
EDB_ERR_ILL_ARGUMENTS	1	Illegal arguments	Wrong arguments, axalant/plm expects the following arguments: Usage of axalant/plm: axalant F:<conffile> <plm-usr> [-{ptkrwq}] <argument>] -p plm-user password (deprecated) -t ECI protocol number 1 - tcpip -k hostname -r port number -w wildcards -q query mode	Correct parameters
EDB_ERR_CFG_MOD_UNSPE CIFIED	10	Module administration failed with error code %d\n	Internal error at initialization of module management	Please contact agile support
EDB_ERR_CFG_MOD_SRC_N OT_FOUND	11	Config source '%s' does not exist or is empty Module configuration '%s' does not exist or is empty	Configuration file is missing	Check configuratio n with administrati on tool

Error Code Name	Error No	Error Message	Description	Solution
EDB_ERR_CFG_MOD_ILL_FORMAT	12	Ignoring config parameter '%s' (illegal format) Unsupported module type %s	Invalid entries in configuration file	Check configuration with administration tool
EDB_ERR_CFG_MOD_OVERFLOW	13	Truncating config parameter '%s'	A value in configuration file exceeds 300 characters	Check configuration with administration tool
EDB_ERR_CFG_MOD_KEY_READ	14		No longer returned by axalant/plm	
EDB_ERR_CFG_MOD_ILLEGAL	15	"Could not start module %s\n"	Could not start module, module name or library missing in configuration file	Check configuration with administration tool
EDB_ERR_ENV_MOD_UNSPECIFIED	20		No longer returned by axalant/plm	
EDB_ERR_ENV_MOD_ROOT_UNKNOWN	21	EP_APP_ROOT" unknown "	Root directory unknown	Check installation (environment variable ep_root missing)
EDB_ERR_GET_OR_PUT_ENV	22	[Environment] (Reading/Setting environment entries)	Error while reading contents from the [Environment] section and export contents	Check configuration with administration tool
EDB_ERR_MOD_UNSPECIFIED	50	Module administration failed with error code %d	Error while initializing module administration	Check configuration with administration tool
EDB_ERR_MOD_ABORTED	51	Could not start module '%s' (err = %d)	Module unable to start, tolerated for non-core modules	Contact module provider
EDB_ERR_MOD_CONFLICT	52	Could not start module %s\n	Module ID already in use, two or more modules use the same module id	Check configuration with administration tool

Error Code Name	Error No	Error Message	Description	Solution
EDB_ERR_MOD_NOT_FOUND	53	Could not start module '%s' (err = %d)	Module library not found	Contact Agile support or module provider
EDB_ERR_MOD_IMPORT_CIRCULAR	54	Could not start module '%s' (err = %d)	Circular import dependencies	Contact Agile support or module provider
EDB_ERR_MOD_IMPORT_MISMATCH	55	Could not start module '%s' (err = %d)	One of the imported modules has an incorrect version	Contact Agile support or module provider
EDB_ERR_MOD_IMPORT_FAILED	56	Could not start module '%s' (err = %d)	On of the imported modules could not be initialized	Contact Agile support or module provider
EDB_ERR_PRT_INI_UNSPECIFIED	60	Privileges %d	Internal error in Dataview privileges module	Contact Agile support
EDB_ERR_PRT_INI_NO_LIC	61	No License found	Unable to obtain DataView License	Check license number and expiration date
EDB_ERR_PRT_INI_UNKNOWN_USER	62	Unknown user. Insert user in dtv user list	Specified user does not exist in the database (table T_USER)	Check if correct user name was used
EDB_ERR_PRT_INI_UNKNOWN_GROUP	63	User has no group. Insert user in a group	User was not assigned to group. Dump error.	Check user definition
EDB_ERR_DFV_INI_UNSPECIFIED	64	Default-Module	Unable to initialize DataView Default module.	Contact Agile support
EDB_ERR_LNG_INI_UNSPECIFIED	65	Language-Module	Unable to initialize DataView Language module. Dump error.	Contact Agile support

Error Code Name	Error No	Error Message	Description	Solution
EDB_ERR_LNG_INI_NO_TABLE	66	Table T_LANGUAGE not found	Unable to initialize DataView Language module, missing table T_LANGUAGE. Dump error.	Contact Agile support
EDB_ERR_USX_INI_UNSPECIFIED	70	User-Exits	Unable to initialize DataView Userexit module	Contact Agile support
EDB_ERR_DTV_SUR_UNSPECIFIED	71	User-Interface	Unable to initialize DataView UI module. Dump error.	Contact Agile support
EDB_ERR_DTV_LCK_UNSPECIFIED	72	Lock-Module	Unable to initialize DataView Lock module.	Contact Agile support
EDB_ERR_IWF_INI_UNSPECIFIED	73	Entity-List	Unable to initialize DataView IWF module. Dump error.	Contact Agile support
EDB_ERR_ECI_MOD_UNSPECIFIED	74		No longer returned by axalant/plm	
EDB_ERR_BAS_MOD_UNSPECIFIED	75		No longer returned by axalant/plm	
EDB_ERR_ART_MOD_UNSPECIFIED	76		No longer returned by axalant/plm	
EDB_ERR_DOC_MOD_UNSPECIFIED	77		No longer returned by axalant/plm	
EDB_ERR_PRO_MOD_UNSPECIFIED	78		No longer returned by axalant/plm	
EDB_ERR_COR_MOD_UNSPECIFIED	79	Could not start the ECI module: err=%d Static Core Modules	Unable to initialize the ECI or other core module	Contact Agile support
EDB_ERR_FMS_MOD_UNSPECIFIED	80		No longer returned by axalant/plm	
EDB_ERR_BAS_PASSWD	81	Foundation-Password (PLM-PDM)	Unable to obtain foundation license	Check license number and expiration date

Error Code Name	Error No	Error Message	Description	Solution
EDB_ERR_USX_EDB_INI_UNSPECIFIED	82		No longer returned by axalant/plm	
EDB_ERR_EDB_BATCH_UNSPECIFIED	83	EDB-Batch-Module	Batch call failed	Check the batch call
EDB_ERR_FMG_PASSWD_UNSPECIFIED	84	ECI server ECI connection password check failed: %d ECI authentication failed: rc=%d	The ECI client (Java client, Web client or CAD interface) failed to authenticate.	Verify use of correct username and password
EDB_ERR_DTV_TCL_UNSPECIFIED	85	TCL: %d	Unable to initialize DataView TCL integration.	Contact Agile support
EDB_ERR_ECI_INIT_FAILED	86	ECI server Unable to init ECI server on port %s: rc=%d, error %d: %s ECI authentication failed: rc=%d ECI connection password check failed	Unable to initialize Eci server (specified port already in use?), or wrong user password	Check ECI arguments or user/password combination
EDB_ERR_UNKNOWN_ERR	99	Basic initialization failed	Internal error	Contact Agile support
EDB_ERR_DTV_WIN_UNSPECIFIED	100	Window-Module	Unable to initialize DataView Window module	Contact Agile support
EDB_ERR_DTV_WIN_TERM	101	Window-Module Error in reading variable DATAVIEW_TERM Check, if DATAVIEW_TERM is set	While initializing DataView, there is an error in reading the variable DATAVIEW_TERM	Check installation

Error Code Name	Error No	Error Message	Description	Solution
EDB_ERR_DTV_WIN_SIZE	102	Window-Module Error in reading variable DATAVIEW_SIZE Check, if DATAVIEW_SIZE is set	While initializing DataView, there is an error in reading the variable DATAVIEW_SIZE	Check installation
EDB_ERR_DTV_WIN_INP	103	Window-Module Error in reading variable DATAVIEW_INP Check, if DATAVIEW_INP is set	While initializing DataView, there is an error in reading the variable DATAVIEW_INP	Check installation
EDB_ERR_DTV_WIN_INIT	104	Window-Module Error in reading variable DATAVIEW_INIT Check, if DATAVIEW_INIT is set	While initializing DataView, there is an error in reading the variable DATAVIEW_INIT	Check installation
EDB_ERR_DTV_WIN_KEY	105	Window-Module Error in reading key file Check, if file vt_key or ansi_key exist, check permissions of the files	While initializing DataView, there is an error in reading the variable DATAVIEW_INIT	Check installation
EDB_ERR_DTV_WIN_NRDE	106	Window-Module Error in reading variable DATAVIEW_NRD E Check, if DATAVIEW_NRD E is set to correct value	While initializing DataView, there is an error in reading key file vt_key or ansi_key	Check installation
EDB_ERR_DTV_WIN_TCP_C RE	107	Window-Module Error in creating TCP-service	While initializing DataView, there is an error in creating TCP-service	Check installation

Error Code Name	Error No	Error Message	Description	Solution
EDB_ERR_DTV_WIN_TCP_REG	108	Window-Module Error in registering TCP-service	While initializing DataView, there is an error registrating TCP-service	Check installation
EDB_ERR_DTV_WIN_LIC_READ	109	Window-Module Error in reading DataView License Check, if license server and agent are running.	While initializing DataView, there is an error in reading DataView License	Check installation
EDB_ERR_DTV_DBS_UNSPECIFIED	110	Database	Database unspecified. Connection to database failed	Check installation
EDB_ERR_DTV_DBS_ACC	111	Database Error in opening database database running? database user ok? database password ok? TNS_ADMIN set? Try sqlplus Access on DATAVIEW_TBSP or DATAVIEW_IXSP denied?	There is an error in opening the database.	Please check – 1) Database is running 2) Database user and password are correct 3) TNS_ADMIN is set properly 4) Check the access rights.
EDB_ERR_DTV_DBS_TBSP	112	Database Error in reading variable DATAVIEW_TBSP Check, if DATAVIEW_TBSP is set	DataView is unable to read the variable DATAVIEW_TBSP	Please check if DATAVIEW_TBSP is set properly