IBM Sterling Gentran Server for Windows

IBM

Quick Start Guide

Version 5.3.1

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Sterling Gentran:Server for Windows Quick Start

About Sterling Gentran:Server

Welcome to IBM® Sterling Gentran:Server® for Microsoft Windows, the IBM EDI and data translation solution for the Microsoft Windows operating system platform.

Sterling Gentran:Server provides the easy-to-use tools you need to electronically exchange data with your trading partners, including the following functions:

- data translation
- process control
- communications system

Important Links

The IBM product information website for Sterling Gentran:Server is:

http://www.ibm.com/software/commerce/b2b/products/gentran/

The Sterling Gentran:Server Information Center, where all documentation is available is:

http://pic.dhe.ibm.com/infocenter/sgsw531/v5r3m1/index.jsp

Passport Advantage®

If you are downloading Sterling Gentran:Server version 5.3.1 from Passport Advantage, follow the instructions in the download document available at:

http://www.ibm.com/support/entry/portal/Planning

Support for Sterling Gentran:Server

Sterling Gentran:Server software is supported by trained product support personnel who are available to help with product questions or concerns.

You can access the Sterling Gentran:Server Customer Support page (Support Portal) at:

http://www.ibm.com/support/entry/portal/Overview/Software/Other_Software/Sterling_Gentran:Server_for_Microsoft_Windows

You can also call Customer Support at 1-800-IBM-SERV (1-800-426-7378).

To help us provide prompt service, we ask that you do the following:

- Attempt to recreate any problem that you encounter and record the exact sequence of events.
- When you call product support, you should be prepared to provide us with the information below.

Information	Description
Identification	Your company name, your name, telephone number and extension, your company's IBM customer number (ICN), and the problem management record (PMR) number (if the question refers to a previously reported issue)
System Configuration	Sterling Gentran:Server version (and any patches or options installed) and information about the primary Sterling Gentran:Server system controller and all machines experiencing problems, including • Microsoft Windows operating system version • amount of memory • available disk space • database type and version • browser version Also, please describe any recent changes in your hardware, software, or the configuration of your system.
System Data Store	Servers containing folders in the system data store
Error Messages	If possible, get a screen capture of any error messages and the point at which the error occurred, as well as any log files. (If you cannot get a screen capture, record the exact wording of the error.)
Attempted Solutions	Record any steps that you took attempting to resolve the problem and note all outcomes. Provide an estimate on how many times the problem occurred and whether it can be reproduced.

About the Release Notes

The Release Notes include descriptions of the fixes and enhancements made to the software and documentation since the last release. They also describe any changes and instructions that occurred after the installation DVD was finalized.

The Release Notes can be found in the Sterling Gentran:Server info center:

http://pic.dhe.ibm.com/infocenter/sgsw531/v5r3m1/index.jsp

Important: You should consult the Release Notes before you begin installing the Sterling Gentran:Server software.
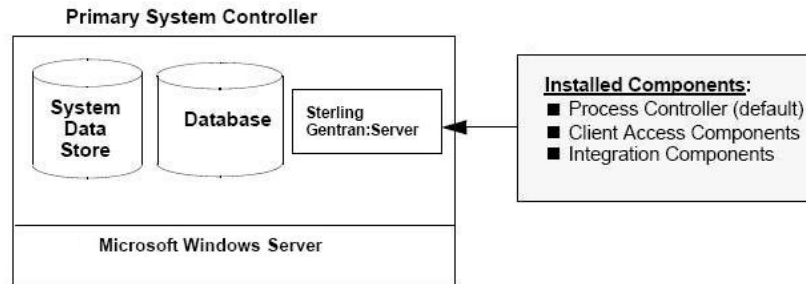
Sample System Configurations

This topic illustrates sample distributed Sterling Gentran:Server systems. Each of these systems has a different number of system components and different distribution of installation components.

The following illustrations are intended to demonstrate the flexibility of Sterling Gentran:Server for systems from the simple to the complex. In all of these examples, you still have the flexibility to further expand the system by adding additional servers to the system and distributing Sterling Gentran:Server installation components.

Single Workstation Environment

In a single workstation system, all of the Sterling Gentran:Server installation components that you need are installed on one machine.
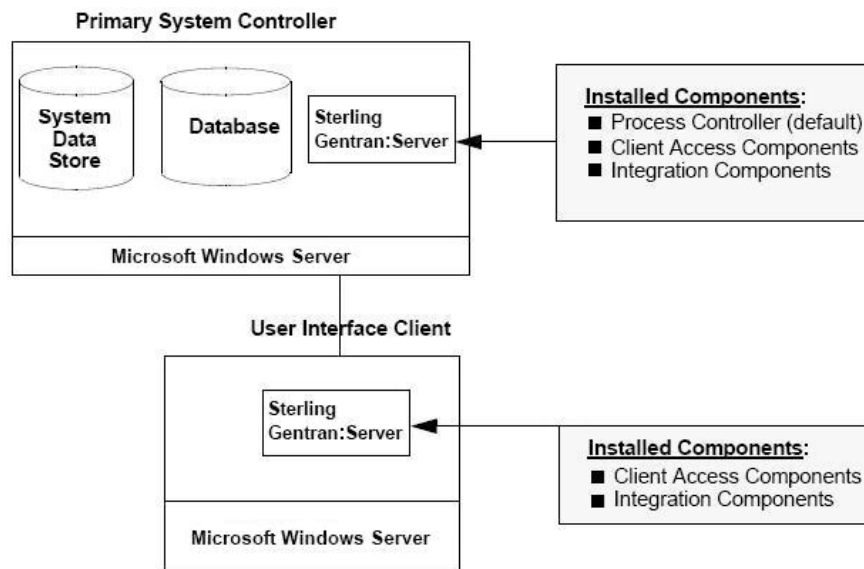
The following diagram illustrates a sample Single Workstation system, consisting of one machine, which contains all Sterling Gentran:Server installation components.

```
Primary System Controller
┌─────────────────────────────────────────────┐
│  ╔══════╗   ╔══════╗   ┌───────────┐         │
│  ║System║   ║      ║   │ Sterling  │         │      Installed Components:
│  ║ Data ║   ║Database║ │Gentran:Server│◄─────┼───── ■ Process Controller (default)
│  ║Store ║   ║      ║   └───────────┘         │      ■ Client Access Components
│  ╚══════╝   ╚══════╝                         │      ■ Integration Components
│                                              │
│            Microsoft Windows Server          │
└─────────────────────────────────────────────┘
```

Single Controller System

In a single controller system, Sterling Gentran:Server is distributed across one primary Sterling Gentran:Server system controller with one or more user interface clients.
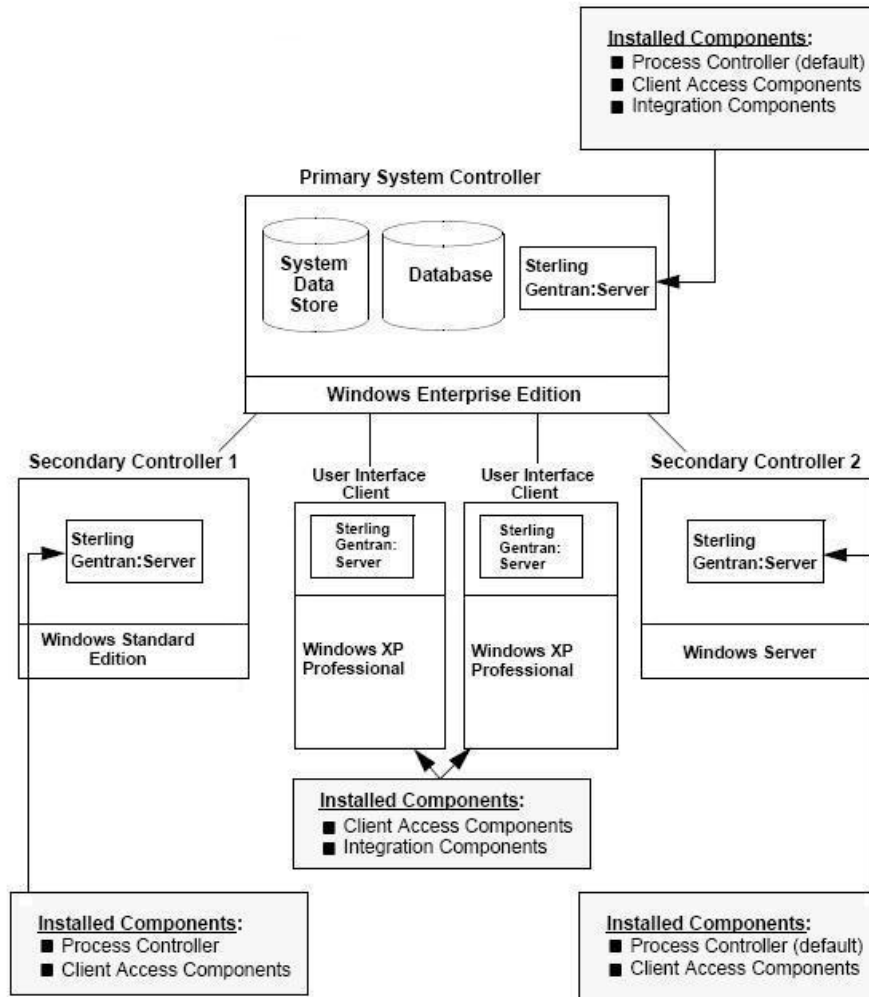
The following diagram illustrates a sample single controller system in a non-clustered environment. This distributed system consists of one primary system controller and one user interface client.

```
Primary System Controller
┌─────────────────────────────────────────────┐
│  ╔══════╗   ╔══════╗   ┌───────────┐         │
│  ║System║   ║      ║   │ Sterling  │         │      Installed Components:
│  ║ Data ║   ║Database║ │Gentran:Server│◄─────┼───── ■ Process Controller (default)
│  ║Store ║   ║      ║   └───────────┘         │      ■ Client Access Components
│  ╚══════╝   ╚══════╝                         │      ■ Integration Components
│            Microsoft Windows Server          │
└─────────────────────────────────────────────┘
                      │
              User Interface Client
        ┌─────────────────────────────┐
        │      ┌───────────┐          │
        │      │ Sterling  │          │      Installed Components:
        │      │Gentran:Server│◄──────┼────── ■ Client Access Components
        │      └───────────┘          │      ■ Integration Components
        │      Microsoft Windows Server│
        └─────────────────────────────┘
```

Multiple Controller System

In a multiple controller system, Sterling Gentran:Server is distributed across one primary system controller with one or more secondary controllers and one or more user interface clients.

The following diagram illustrates a sample multiple controller system in a non-clustered environment. This distributed system consists of one primary Sterling Gentran:Server system controller with two secondary controllers and two user interface clients.


Clustered System

In a clustered system, the Sterling Gentran:Server data store resides on the disk vault. The database is resident or non-resident and Sterling Gentran:Server is installed on one or more nodes.

The following diagram illustrates a sample clustered system. This clustered system consists of one primary Sterling Gentran:Server system controller (the disk vault) and two nodes. The database is not included in this sample because it can be located anywhere that is accessible from the network.
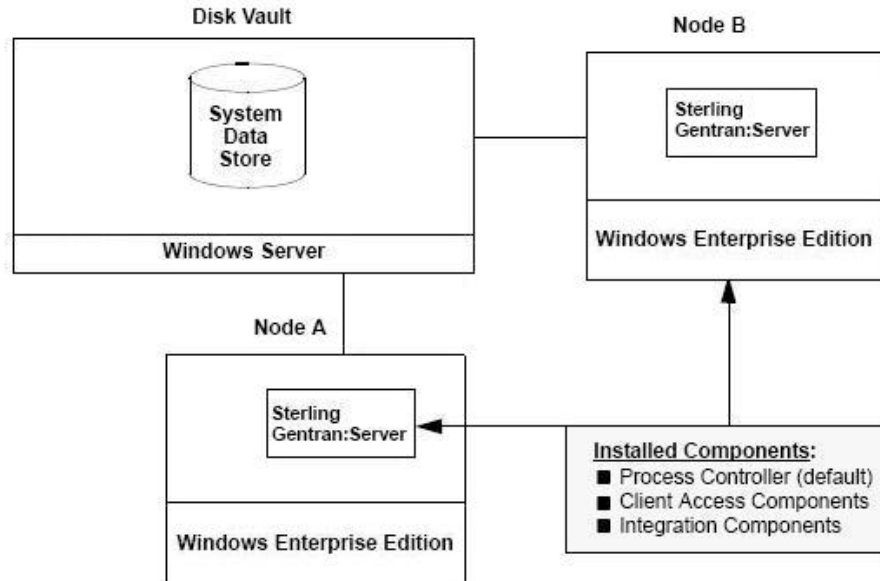
Hardware Requirements

Work with IBM to determine your hardware requirements based on the amount of inbound and outbound data you expect to process per day.

Supported Operating Systems

This topic describes the Microsoft Windows systems that have been tested for use with Sterling Gentran:Server.

This information is intended to be used as a starting point for determining which versions of Sterling Gentran:Server and operating system are compatible. The version and service pack numbers contained in this list are the releases that have been tested with Sterling Gentran:Server at the time this list was published.

Note: Microsoft only supports clustering on Microsoft Windows 2003 Enterprise Edition and Microsoft Windows 2008 Enterprise Edition. IBM supports clustering with a distributed license.

This table identifies the operating systems supported for use with Sterling Gentran:Server.

Sterling Gentran:Server System Component	Operating System	Service Pack
Single workstation license (nondistributed environment)	Microsoft Windows Server 2003 • Standard Edition • Enterprise Edition • R2 Edition, 32-bit	SP2
	Microsoft Windows Server 2008 • Standard Edition • Enterprise Edition • R1 Edition, 32- and 64-bit • R2 Edition, 64-bit	
	Microsoft Windows 7, 32- and 64-bit	
	Microsoft Windows XP 32-bit	SP3
User Interface Client (distributed environment or single workstation)	Microsoft Windows XP Professional 32-bit	SP3
	Microsoft Windows 2003 • Standard Edition • R2 Edition, 32-bit	SP2
	Microsoft Windows 2008 • Standard Edition • R1 Edition, 32- and 64-bit • R2 Edition, 64-bit	
	Microsoft Windows 7, 32- and 64-bit	
Primary System Controller/Process Controllers/Communication Controllers (distributed environment)	Microsoft Windows Server 2003 • Enterprise Edition • R2 Edition, 32-bit	SP2
	Microsoft Windows Server 2008 • Enterprise Edition • R1 Edition, 32- and 64-bit • R2 Edition, 64-bit	
Node(s) in a Clustered Environment	Microsoft Windows Server 2003 • Enterprise Edition • R2 Edition, 32-bit	SP2
	Microsoft Windows Server 2008 • Enterprise Edition • R1 Edition, 32- and 64-bit • R2 Edition, 64-bit	

Supported Databases

This topic describes the database management systems that have been tested for use with Sterling Gentran:Server.

The version numbers contained in this list are the releases that have been tested with Sterling Gentran:Server at the time this list was published.

Note: This information is intended to be used as a starting point for determining which versions of Sterling Gentran:Server and databases are compatible.

Database Management Systems

You must install a relational database management system (RDBMS). In a distributed environment, the RDBMS must be accessible to all machines on which Sterling Gentran:Server components are installed.

You must also install Open Database Connectivity (ODBC) on your machine (for a single workstation) or on each machine that has Sterling Gentran:Server components installed (for a distributed environment). In addition, you must install the appropriate drivers for your RDBMS. Sterling Gentran:Server uses ODBC to allow the use of databases from different vendors. Typically, ODBC and the correct drivers are installed with your RDBMS.

Notes:
- Check with your vendor for available updates. We strongly recommend that you apply any updates to a test environment prior to upgrading your production system.
- Using Microsoft Windows service pack updates will affect the Microsoft for Oracle ODBC driver version.
- Using Microsoft Windows or SQL Server service pack updates will affect the SQL Server driver version and update the version of MDAC installed on your system.

The following tables summarize the testing configurations with which Sterling Gentran:Server for Microsoft Windows is tested.

SQL Server with Microsoft Windows
- SQL Server 2005, SP4
- SQL Server 2008, SP3
- SQL Server 2012, SP1

Oracle with Microsoft Windows
- Oracle 10g
- Oracle 11g

Please contact Oracle to obtain Oracle Patch Sets and up-to-date status on Oracle configurations, or see the Oracle website:

www.oracle.com

Note: Support for Oracle databases does not include support for the Oracle Exadata platform.

Installation Considerations

- Install Sterling Gentran:Server dedicated member server or stand-alone server—not a primary domain controller.
- Install Sterling Gentran:Server and your database management system (SQL or ORACLE) on a drive that is not your system drive.
- Prior to upgrading Sterling Gentran:Server, back up your database tables and your Sterling Gentran:Server data store.

  Refer to the website for the database management system you are using for the most current information about backing up your database.

MAPI Considerations

If you are using Microsoft Outlook 2002, or Microsoft Outlook 2003 to configure e-mail audit notifications, you must perform the following prior to installing Sterling Gentran:Server:

*   Install and configure a MAPI-compliant server, such as Microsoft Exchange, on a machine in the domain in which you run Sterling Gentran:Server.
*   Configure a MAPI profile on the MAPI-compliant server.
*   Install and configure Microsoft Outlook 2000, Microsoft Outlook 2002, or Microsoft Outlook 2003 on your primary system controller using a Microsoft Exchange Server profile.

    For Microsoft Office XP and later (including Microsoft Outlook 2002 and later): Due to Microsoft security changes, Microsoft Outlook must be configured for Microsoft Exchange Server for messages to be sent automatically. In addition, the Sterling Gentran:Server Primary System Controller must be in a trusted domain or in the same domain as the Microsoft Exchange Server.

    Notes:

*   **Important:** The use of any other configuration of Microsoft Outlook will result in messages not being sent automatically unless the Microsoft Outlook client is launched.
*   If the e-mail back-end is Microsoft Exchange, the Sterling Gentran:Server Mailbox service must use a domain account that has been granted access to a Microsoft Exchange mailbox. This allows the service to log on directly to the mailbox without being prompted for a password.
*   Consult your Microsoft Outlook administrator if you are having issues with your MAPI-compliant server.

Security Overview

Security is an important consideration when configuring your Sterling Gentran:Server system. Sterling Gentran:Server provides security configuration features and requires specific Windows security permissions to run properly.

The security configuration information is provided in the Sterling Gentran:Server documentation, including the following topics:

*   In the *IBM Sterling Gentran:Server for Microsoft Windows Installation Guide*, see the following chapters:
    *   Installation Overview
    *   Pre-installation Tasks
    *   Post-installation Tasks, specifically the Security section
*   In the *IBM Sterling Gentran:Server for Microsoft Windows Administration Guide*, in the System Administrator Functions chapter, see following topics:
    *   System Configuration Users Tab
    *   System Configuration Security Tab
*   In the *IBM Sterling Gentran:Server for Microsoft Windows User Guide*, in the Getting Started chapter, see the topic on Changing your Password.
*   If you are using RosettaNet, see the following chapters in the *IBM Sterling Gentran:Server for Microsoft Windows RosettaNet User Guide*:
    *   Sterling Gentran:Server for RosettaNet Overview, the RosettaNet Management Console

– Using the Security Profile Manager and Communication Tasks

You can also search for the term "security" on the Sterling Gentran:Server Information Center.

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