Sterling Commerce
An IBM Company

Customer Order Management PCA

Installation Guide

Release 7.5

June 2007

Contents

3   Creating and Updating the Sterling Supply Chain Applications Runtime

4   Installing the Database Components

5   Client Applications

Preface

This manual explains how to install the Sterling Customer Order Management PCA components and contains information relevant to new installations of the Sterling Customer Order Management PCA.

Intended Audience

This manual provides installation and administration information for individuals responsible for installing and maintaining the Sterling Customer Order Management PCA.

Structure

This document contains the following sections:

Chapter 1, "Getting Started"

This chapter provides a high-level introduction to the tasks involved in installing the Sterling Customer Order Management PCA.

Chapter 2, "Installing the Sterling Customer Order Management PCA"

This chapter provides step-by-step instructions for installing the Sterling Customer Order Management PCA on each of the supported operating systems.

Chapter 3, "Creating and Updating the Sterling Supply Chain Applications Runtime"

This chapter explains how to create and update the runtime directory.

Chapter 4, "Installing the Database Components"

This chapter provides step-by-step instructions for running scripts that update your existing database with the Sterling Customer Order Management PCA components.

Chapter 5, "Client Applications"

This chapter explains how to create, install, and launch a Sterling Customer Order Management PCA client application.

Chapter 6, "Installing the Reference Implementation"

This chapter describes how to install the reference implementation for the Sterling Customer Order Management PCA.

Chapter 7, "Deploying the Sterling Customer Order Management PCA"

This chapter explains how to deploy the Sterling Customer Order Management PCA after running the runtime.

Chapter 8, "Launching the Application"

This chapter provides instructions for launching the Sterling Customer Order Management PCA.

Documentation

For more information about the Sterling Customer Order Management PCA® components, see the following manuals in the Sterling Customer Order Management PCA® documentation set:

- *Sterling Customer Order Management PCA® Release Notes*

- *Sterling Customer Order Management PCA® Installation Guide*

- *Sterling Customer Order Management PCA® Concepts*

- *Sterling Customer Order Management PCA® Implementation Guide*

- *Sterling Customer Order Management PCA® User Guide*

- *Sterling Customer Order Management PCA® Upgrade Guide*

- *Sterling Customer Order Management PCA® Javadocs*

For more information about the Sterling Supply Chain Applications® components, see the following manuals in the Sterling Supply Chain Applications® documentation set:

- *Sterling Supply Chain Applications® Release Notes*
- *Sterling Supply Chain Applications® Installation Guide*
- *Sterling Supply Chain Applications® Upgrade Guide*
- *Sterling Supply Chain Applications® Performance Management Guide*
- *Sterling Supply Chain Applications® High Availability Guide*
- *Sterling Supply Chain Applications® System Management Guide*
- *Sterling Supply Chain Applications® Localization Guide*
- *Sterling Supply Chain Applications® Customization Guide*
- *Sterling Supply Chain Applications® Integration Guide*
- *Sterling Supply Chain Applications® Product Concepts*
- *Sterling Warehouse Management System® Concepts Guide*
- *Sterling Supply Chain Applications Platform® Configuration Guide*
- *Sterling Distributed Order Management® Configuration Guide*
- *Sterling Supply Collaboration® Configuration Guide*
- *Sterling Global Inventory Visibility® Configuration Guide*
- *Sterling Product Management® Configuration Guide*
- *Sterling Logistics Management® Configuration Guide*
- *Sterling Reverse Logistics® Configuration Guide*
- *Sterling Warehouse Management System® Configuration Guide*
- *Sterling Supply Chain Applications Platform® User Guide*
- *Sterling Distributed Order Management® User Guide*
- *Sterling Supply Collaboration® User Guide*
- *Sterling Global Inventory Visibility® User Guide*
- *Sterling Logistics Management® User Guide*
- *Sterling Reverse Logistics® User Guide*

- *Sterling Warehouse Management System® User Guide*

- *Sterling Supply Chain Mobile Application® User Guide*

- *Sterling Supply Chain Analytics® Guide*

- *Sterling Supply Chain Applications® Javadocs*

- *Sterling Supply Chain Applications® Glossary*

- *Sterling Parcel Carrier Adapter® Guide*

- *Sterling Application Server® Installation Guide* (for optional component)

For a description of the various documents in the Sterling Customer Order Management PCA® documentation set, see the Sterling Customer Order Management PCA® documentation home page at:

`<YFS_HOME>/documentation/YCD_doc_home.html`

where `<YFS_HOME>` = `<YANTRA_HOME>/Runtime`

and `<YANTRA_HOME>` is the directory where this PCA and the Sterling Supply Chain Applications® are installed.

Conventions

The following conventions may be used in this manual:

Convention	Meaning
`...`	An ellipsis represents information that has been omitted.
< >	Angle brackets indicate user-supplied input.
`mono-spaced text`	Mono-spaced text indicates a file name, directory path, attribute name, or an inline code example or command.
/ or \	Slashes and backslashes are file separators for Windows, UNIX and LINUX operating systems. The file separator for the Windows operating system is "\" and the file separator for Unix and Linux systems is "/". The Unix convention is used unless otherwise mentioned.
<YANTRA_HOME>	User-supplied location of the Sterling Supply Chain Applications installation directory.
<YFS_HOME>	Location of the generated <YANTRA_HOME>/Runtime directory.

1

Getting Started

This chapter explains the prerequisites for installing the Sterling Customer Order Management PCA.

1.1 Before you Begin

If you are upgrading from a prior release, the installer prompts you to upgrade to the Sterling Customer Order Management PCA, Release 7.5. For more information about upgrading to the Sterling Customer Order Management PCA, Release 7.5, see the *Sterling Customer Order Management PCA Upgrade Guide*.

The installation of the Sterling Customer Order Management PCA assumes that you have correctly installed the minimal foundation release as specified in Section 1.2, "Minimum Foundation Requirements". You may also want to read the *Sterling Supply Chain Applications Installation Guide* and ensure that the installation process was executed correctly.

The Sterling Customer Order Management PCA supports a resolution of 800 X 600 pixels.

1.2 Minimum Foundation Requirements

The installation of the Sterling Customer Order Management PCA requires the successful installation of Sterling Supply Chain Applications, Release 7.11 HF11, or higher. For more information about the system requirements for the foundation and this PCA, see the *Sterling Supply Chain Applications Installation Guide*.

1.3 Installation and Runtime Directory Structure

When you install the Sterling Customer Order Management PCA, the following directories are created in the `<YANTRA_HOME>/Applications` directory:

- COM

- COM_Add-in

For more information about the installation and runtime directory structure, see the *Sterling Supply Chain Applications Installation Guide*.

2

Installing the Sterling Customer Order Management PCA

This chapter explains how to install the Sterling Customer Order Management PCA on each supported operating system.

2.1 UNIX and Linux Operating Systems

On UNIX and Linux operating systems, you can install the Sterling Customer Order Management PCA locally in an X Windows environment or remotely in a text-based console environment.

To install the Sterling Customer Order Management PCA on UNIX and Linux:

1. Ensure that there is at least 50 MB of space available for temporary files.

2. Insert the CD that is appropriate for your operating system into your CD-ROM drive.

3. From the root directory, run the `./setup.bin` command.

4. After the installer finishes, check for any errors that may have occurred during the installation process by reviewing the `<YANTRA_HOME>/Customer_Order_Management_PCA_InstallLog.log` file.

5. To locate error notations in the file, search for the string "error", or more specifically, a string such as "STATUS: ERROR".

> **Note:** The following directories are created under the
> `<YANTRA_HOME>/Applications` directory:
>
> - COM
>
> - COM_Add-in

6. The printable Sterling Customer Order Management PCA
   documentation is available on the Documentation CD. Copy the `.pdf`
   files from the Documentation CD to the
   `<YANTRA_HOME>/Applications/COM/documentation` directory.

2.2 Windows Operating Systems

You can install the Sterling Customer Order Management PCA on
Windows.

**To install the Sterling Customer Order Management PCA on
Windows:**

1. Ensure that there is at least 50 MB of space available for temporary
   files.

2. Insert the CD in your CD-ROM drive and the installer automatically
   starts. You can also manually run the installer from the `setup.exe`
   command in the root directory.

3. When the installer window opens, follow the directions.

> **Note:** Use the forward slash (\) as a file separator when
> specifying file paths.

4. After the installer finishes, you can verify if there are errors during
   the installation process by reviewing the
   `<YANTRA_HOME>/Customer_Order_Management_PCA_InstallLog.log`
   file.

5. To locate any notations of errors in this file, search for the string
   "error", or more specifically, a string such as "STATUS: ERROR".

> **Note:** The following directories are created under the
> `<YANTRA_HOME>/Applications` directory:
>
> - COM
> - COM_Add-in

6. The printable Sterling Customer Order Management PCA
documentation is available on the Documentation CD. Copy the `.pdf`
files from the Documentation CD to the
`<YANTRA_HOME>/Applications/COM/documentation` directory.

2.3 Remote Computers

You can install the Sterling Customer Order Management PCA on any
supported remote UNIX server. You cannot install the Sterling Customer
Order Management PCA on a remote Windows server.

**To install the Sterling Customer Order Management PCA on a
remote UNIX server:**

1. Ensure that the remote machine on which you are installing the
Sterling Customer Order Management PCA has at least 50 MB of free
disk space.

2. FTP the `setup.bin` file from the installation CD to the remote UNIX
server.

> **Note:** Typically, when the `setup.bin` file is copied from a
> Windows environment to a UNIX environment, the
> permissions are changed. To ensure that the proper
> permissions are set, run the following command:
>
> `chmod 755 setup.bin`

3. Start the installation procedure using the `./setup.bin -i console`
command and follow the directions in Section 2.1, "UNIX and Linux
Operating Systems".

> **Note:** The following directories are created under the
> `<YANTRA_HOME>/Applications` directory:
>
> - COM
> - COM_Add-in

2.4 Installing the Language Pack

You can install the language pack for the operating system supported by the Sterling Customer Order Management PCA. For more information about installing the language pack, see the *Sterling Supply Chain Applications Installation Guide*.

2.5 Setting Up Database Scripts

This section describes scripts that you need to set up for Oracle, DB2, and SQL server databases.

2.5.1 Oracle Databases

If you are using a locally managed tablespace or another utility to size your database, modify the `ycd_tables.sql` file residing in the `<YANTRA_HOME>/Applications/COM_Add-in/database/oracle/scripts` directory to reference your newly created tablespace.

The DDLs in the Sterling Customer Order Management PCA scripts create a standard set of indexes. You may need to create additional indexes or modify existing indexes according to your business needs.

2.5.2 DB2 Databases

The script files reside in the `<YANTRA_HOME>/Applications/COM_Add-in/database/db2/scripts` directory.

The `ycd_tables.sql` script creates tables and indexes. Certain tables require a page size of 16K. For such tables, you must have a tablespace to accommodate them. You can specify the tablespace for tables and indexes by modifying the `ycd_tables.sql` script. If you do not specify,

DB2 automatically adds tables and indexes in the available tablespace using its internal logic.

2.5.3 SQL Server Databases

To configure your SQL Server database for your production environment, set up and run a master command script and pass parameters to create tables and indexes for your schema.

The script files reside in the `<YANTRA_HOME>/Applications/COM_Add-in/database/sqlserver/scripts` directory.

2.6 Setting Up Factory Default Variables

To set up the factory default variables, configure the `ycd_fc_variable.properties` file located in the `<YANTRA_HOME>/Applications/COM/resources` directory.

Use the variable described in Table 2–1 to install the factory defaults.

Table 2–1   Variables for Factory Defaults

Variable Name	Description
Mail_Server	The e-mail server used by e-mail notification services.

2.7 Setting Up Reference Implementation Variables

To use the Reference Implementation, configure the `ycd_ref_variable.properties` file located in the `<YANTRA_HOME>/Applications/COM/resources` directory.

For more information about the organization model, see the *Sterling Customer Order Management PCA Implementation Guide*.

To create participants and users for reference implementation, use the variables provided in Table 2–2.

Table 2–2   Variables for the Sterling Customer Order Management PCA Reference Implementation

Variable Name	Description
Corporate_Enterprise_ Code	Use this variable to define the organization code of the company.
Corporate_Enterprise_ Name	Use this variable to define the name of the company.
Corporate_Enterprise_ BillTo_Company	Use this variable to define the bill-to address of the company.
Corporate_Enterprise_ Company_Name	Use this variable to define the corporate address of the company.
Online_Channel_Enter prise_Code	Use this variable to define the online business channel of the company.
Online_Channel_Enter prise_Name	This is the online business channel used for display purposes.
Online_Channel_Enter prise_BillTo_Company _Name	Use this variable to define the bill-to address of the online channel enterprise.
Online_Channel_Enter prise_Name	This populates the company name field of the business channel's corporate address.
Online_Channel_Enter prise_Name	This is the online business channel used for display purposes.
Non_Integrated_Node	This is the organization code created for a distribution center node of the online business channel organization.
Non_Integrated_Node_ Name	This is the name of the distribution center code.
Generic_Service_Level _Carrier_Code	This is the organization code for the carrier organization created for the carrier service drop-down list.
CSR_UserName	This is the unique user name used to create a CSR for the company.
CSR_Password	This populates the password field for the CSR user record.

Table 2–2   Variables for the Sterling Customer Order Management PCA Reference Implementation

Variable Name	Description
CSR_Lead_UserName	This is the unique user name used to create a CSR Lead for the company.
CSR_Lead_Password	This populates the password field for the CSR Lead user record.

2.8 Installing WebSphere Commerce

This section describes the additional installation and configuration steps required for the features obtained when you install WebSphere Commerce, version 6.0.0.1.

2.8.1 Installing Required .jar Files

Axis, version 1.4, is required to use the integration features of WebSphere Commerce. You can download Axis, version 1.4, from the Apache website at http://www.apache.org/dyn/closer.cgi/ws/axis/1_4. Download, extract the binary files, and copy the following files from the `<Extraction_Point>\axis-1_4\lib` directory into your `<YFS_HOME>\lib` directory before creating the Enterprise Archive (EAR) file:

- axis.jar
- commons-discovery-0.2.jar
- commons-discovery-0.2.LICENSE
- commons-logging-1.0.4.jar
- commons-logging-1.0.4.LICENSE
- javax.jms.jar, jaxrpc.jar
- saaj.jar
- wsdl4j-1.5.1.jar

When you build your EAR, named `yantra.ear`, the required axis jars are included for deployment.

2.8.2 Configuring WebSphere Commerce for Web Service Calls

WebSphere Commerce enables you to make web service calls from within Sterling Supply Chain Applications services. The `ycd_wci.properties` file contains the properties needed to define how the Sterling Supply Chain Applications connect with the WebSphere Commerce web services. This file is located in the `<YFS_HOME>\resources` directory.

Table 2–3, "WebSphere Commerce Web Service Call Properties" describes the properties in the `ycd_wci.properties` file.

Table 2–3   WebSphere Commerce Web Service Call Properties

Property	Description
wci.url	The path to where the WebSphere Commerce web services are located. For example, if the WebSphere Commerce web services are installed at `https://localhost:8000/webapp/wcs/services` the Sterling Supply Chain Applications add the correct service to this URL.
wci.username	The WebSphere Commerce user name required when calling the web services.
wci.username	The WebSphere Commerce user name required when calling their web services.
wci.password	The WebSphere Commerce password required when calling the web services.

A sample file, named `ycd_wci.properties.sample`, is located within the `<YFS_HOME>\resources` directory. You can rename this file and modify the attributes with the proper values to configure WebSphere Commerce for making web service calls.

2.8.3 Configuring WebSphere Commerce for Payment Services

You can define WebSphere Commerce to return response codes from the external payment systems it is configured to work with. To translate these response codes, the Sterling Supply Chain Applications interpret a mapping of the Payment System Name. The external response code

returned from the WebSphere Commerce payment service is mapped back to a code recognized by the Sterling Supply Chain Applications. To enable this capability, you must configure the `<YFS_HOME>\resources\ycd_wci_response_code_map.xml` file. This is an XML file where each mapped relation is configured as follows:

- If the response code is returned from an external payment system, create a ResponseCode element with the PaymentSystemName attribute that is returned by the web service, and the ExternalResponseCode attribute returned as the web service's response code. Map this code to an InternalResponseCode attribute. For valid InternalResponseCodes attribute values, see the *Sterling Customer Order Management PCA Implementation Guide*.

- If the WebSphere Commerce payment service returns with a response code that is not generated from the External Payment System, only the ExternalResponseCode and InternalResponseCode attributes are used. Only the elements without a PaymentSystemName attribute are utilized for this relationship.

A sample file, named `ycd_wci_response_code_map.xml.sample`, is located in the `<YFS_HOME>\resource` directory. You can rename this file and modify the attributes with the appropriate values.

2.9 Uninstalling the Sterling Customer Order Management PCA

To uninstall the Sterling Customer Order Management PCA:

1. Navigate to `<YANTRA_HOME>/Applications/COM/COMPCAUninstaller`.

2. Run the Uninstall COM PCA executable (`Uninstall Customer Order Management PCA.exe` in Windows) to uninstall the Sterling Customer Order Management PCA.

> **Note:** Once you uninstall the Sterling Customer Order Management PCA, delete the `<YFS_HOME>` directory.

3

Creating and Updating the Sterling Supply Chain Applications Runtime

This chapter provides information about creating and updating the runtime directory after the installation is complete.

> **Note:** If you are creating or updating Runtime using WebSphere Java, ensure that you set the LANG environment variable to blank.

3.1 Creating the Sterling Supply Chain Applications Runtime

After setting the properties files for the first time, you must create the Sterling Supply Chain Applications Runtime directory.

> **Note:** If you also want to install the Sterling Store Inventory Management PCA, run the `ant -f ycd_install_with_SIM` command located in the `<YANTRA_HOME>/COM_Add-in/bin` folder.

For more information about creating the Sterling Supply Chain Applications Runtime, see the *Sterling Supply Chain Applications Installation Guide*.

3.2 Updating the Sterling Supply Chain Applications Runtime

If you have created the Sterling Supply Chain Applications Runtime directory after installing the Sterling Customer Order Management PCA, and you modify any files in the `<YANTRA_HOME>/Applications/COM` or `<YANTRA_HOME>/Applications/COM_Add-in` directories, you must update the Sterling Supply Chain Applications Runtime directory.

> **Note:** If you have also installed the Sterling Store Inventory Management PCA, run the `ant -f ycd_install_with_SIM` command located in the `<YANTRA_HOME>/COM_Add-in/bin` folder.

For more information about updating the Sterling Supply Chain Applications Runtime, see the *Sterling Supply Chain Applications Installation Guide*.

4

Installing the Database Components

This chapter describes how to run the necessary scripts to update your database with the Sterling Customer Order Management PCA components.

The script you run depends on which database you are using.

- If you are using an Oracle database, see Section 4.1, "Oracle Databases".

- If you are using a DB2 database, see Section 4.2, "DB2 Databases".

- If you are using a SQL Server database, see Section 4.3, "SQL Server Databases".

After you run the appropriate scripts, load the Sterling Customer Order Management PCA factory defaults. For more information, see Section 4.4, "Loading the Database Factory Defaults".

4.1 Oracle Databases

To configure your Oracle database for your production environment, you must set up and run a series of scripts to create the tables, indexes, and sequences for your schema.

These script files reside in the `<YFS_HOME>/database/oracle/scripts` directory. The `ycd_master_db_script.sql` script is the master script that calls all of the other scripts required for creating tables and indexes.

To run the scripts:
1. Log into the Oracle Server Manager as `sysdba`.
2. Create the user that is the designated schema owner.

3. Grant the following privileges to the newly created user:
   - ALTER SESSION
   - CREATE PROCEDURE
   - CREATE SEQUENCE
   - CREATE SESSION
   - CREATE SYNONYM
   - CREATE TABLE
   - CREATE VIEW
   - EXECUTE ANY PROCEDURE
   - INSERT ANY TABLE
   - UPDATE ANY TABLE
   - SELECT ANY TABLE

4. Log out of the Oracle Server Manager and log back in as the newly created user.

5. From the `<YFS_HOME>/database/oracle/scripts/` directory, run the `ycd_master_db_script.sql` script. This creates the tables, indexes, sequences, and views.

6. Examine the `<YFS_HOME>/database/oracle/scripts/ycd_master_db_script.log` file for database creation errors.

7. Validate the database as described in the *Sterling Supply Chain Applications Installation Guide*.

8. Check for the appropriate degree of parallelism, using information provided in the *Sterling Supply Chain Applications Performance Management Guide*.

4.1.1 Enabling the Text Search Feature on Oracle Databases

The Sterling Supply Chain Applications support two types of text search indexes on an Oracle database: CTXCAT and CONTEXT. The CTXCAT index supports automatic updates of text search indexes whereas, the CONTEXT index does not support automatic updates of text search

indexes. Sterling Commerce recommends to use the CTXCAT index. For information about how to create the text search indexes, see the *Sterling Supply Chain Applications Customization Guide*.

This section explains the following:

- Enabling the Text Search Feature for a CTXCAT Index
- Enabling the Text Search Feature for a CONTEXT Index

4.1.1.1 Enabling the Text Search Feature for the CTXCAT Index

To enable the text search feature on an Oracle database using the CTXCAT index:

1. Make sure that the Oracle database is configured with the Oracle Text feature.

2. Log in to the Oracle server with a user ID having the CTXAPP privilege.

3. From the `<YANTRA_HOME>/Applications/Foundation/database/oracle/scripts/textsearch/` directory, run: `ycd_create.sql` to create the new CTXCAT type text search index.

    > **Note:** You must perform Step 4 only if you want to use the text search feature provided by Oracle.

4. Edit the `yfs.properties` file located in the `<YANTRA_HOME>/Applications/Foundation/resources/` directory. Set the value of the `yfs.db.textsearch` property to "Y".

5. Make sure the value of the `yfs.db.textsearch.oracle.contexttype` property in the `yfs.properties` file is set to "ctxcat".

4.1.1.2 Enabling the Text Search Feature for the CONTEXT Index

To enable the text search feature on an Oracle database using the CONTEXT index:

1. Make sure that the Oracle database is configured with the Oracle text feature.

2. Log in to the Oracle server with a user ID having the CTXAPP privilege.

3. From the `<YANTRA_HOME>/Applications/Foundation/database/oracle/scripts/textsearch` directory, run the `ycd_create.sql` script to create the new CONTEXT type text search index.

> **Note:** The CONTEXT type text search indexes that are created on the Oracle database using the `ycd_create.sql` script are not automatically updated. The DBA must run the `ycd_update.sql` script to update the CONTEXT type text search indexes, when needed, using the scheduled jobs. The DBA can decide the appropriate frequency to set up these scheduled jobs.

> **Note:** You must perform Step 4 only if you want to use the text search feature provided by Oracle.

4. Edit the `yfs.properties` file located in the `<YANTRA_HOME>/Applications/Foundation/resources` directory. Set the values of the `yfs.db.textsearch` property to "Y".

5. Make sure that the value of the `yfs.db.textsearch.oracle.contexttype` property in the `yfs.properties` file is set to "context".

4.2 DB2 Databases

To configure your DB2 database for your production environment, you must set up and run a series of scripts to create the tables, indexes, and sequences for your schema.

These script files reside in the `<YFS_HOME>/database/db2/scripts` directory.

To run the scripts:

1. Run the `ycd_tables.sql` script located in the `<YFS_HOME>/database/db2/scripts` directory, using the DB2 command line processor utility as follows:

   `db2 -tvf <filename>`

2. Validate the database as described in the *Sterling Supply Chain Applications Installation Guide*.

3. Check for the appropriate degree of parallelism, using information provided in the *Sterling Supply Chain Applications Performance Management Guide*.

4.3 SQL Server Databases

To configure your SQL Server database for your production environment, you must set up and run a series of scripts to create the tables, indexes, and sequence for your schema.

These script files reside in the `<YFS_HOME>/database/sqlserver/scripts` directory. The ycd_sqlserver_master_db_script.cmd script is the master script that calls all of the other scripts required for creating tables and indexes.

To run the scripts:

1. Make sure you have a SQL Server client installed on your computer.

2. From the `<YFS_HOME>/database/sqlserver/scripts` directory, run the `ycd_sqlserver_master_db_script.cmd` script, passing the ServerName, DatabaseName, UserID, and Password as parameters.

3. Examine the log file for errors.

4. Validate the database as described in the *Sterling Supply Chain Applications Installation Guide*.

5. Check for the degree of parallelism, using information provided in the *Sterling Supply Chain Applications Performance Management Guide*.

4.3.1 Enabling the Text Search Feature on SQL Server

To enable the text search feature on a SQL server database:

1. Make sure that the Microsoft Search service is running on the machine on which the SQL Server is installed.

2. Log in to the SQL Server Manager with a user ID that has DBA privileges.

3. From the `<YANTRA_HOME>/Applications/Foundation/database/sqlserver/scripts/textsearch` directory, run the `ycd_create.sql` script to create new text search indexes.

> **Note:** The text search indexes that are created on the SQL Server using the `ycd_create.sql` script are not automatically updated. Before running the `ycd_create.sql` script, the DBA must run the "/*Database*/" string in the `ycd_create.sql` script and specify the database name.

> **Note:** You must perform Step 4 only if the text search index creation is successful.

4. Edit the `yfs.properties` file that is located in the `<YANTRA_HOME>/Applications/Foundation/resources` directory. Set the value of the `yfs.db.textsearch` property to "Y".

   For more information about how to create the text search indices, see the *Sterling Supply Chain Applications Customization Guide*.

5. Update the Sterling Supply Chain Applications Runtime for these modifications.

4.4 Loading the Database Factory Defaults

Before loading the database factory defaults, ensure that you set the following environment variables appropriately:

- YANTRA_HOME
- YFS_HOME
- JAVA_HOME

- ANT_OPTS

- ANT_HOME

For more information about setting these environment variables, see the *Sterling Supply Chain Applications Installation Guide*.

4.4.1 Loading the Sterling Customer Order Management PCA Factory Defaults

This section provides the procedure to load the Sterling Customer Order Management PCA factory defaults.

To load the Sterling Customer Order Management PCA factory defaults:

1. Run the following ant script from the `<YFS_HOME>` directory:

```
ant -f bin/ycd_load_defaults.xml validate -logfile
<logfile>
```

When you run this command, the system validates the following configurations:

- User Exit Implementation—The Sterling Customer Order Management PCA provides an implementation for some of the user exits. If the user exit implementations are not modified or overridden, the validation process succeeds. Otherwise, it fails.

  The Sterling Customer Order Management PCA provides an implementation for the following user exits:

  - YFSCollectionCreditCardUE

  - YFSCollectionOthersUE

  - YFSCollectionStoredValueCardUE

  - YFSBeforeCreateOrderUE

  - YFSBeforeChangeOrderUE

  - YFSProcessOrderHoldTypeUE

  - OMPGetCarrierServiceOptionsForOrderingUE

- Document Template Modification—The Sterling Customer Order Management PCA provides a few document templates. The validation succeeds if the document template does not exist. The validation fails if the document template exists and is modified.

The Sales Order Split Line Default template for sales orders is validated.

2. Examine the specified log file to ensure that the validation has succeeded. You can use the same script for Windows, UNIX, and LINUX.

If the validation succeeds, run the following ant script from the `<YFS_HOME>` directory:

```
ant –f bin/ycd_load_defaults.xml install –logfile <logfile>
```

If the validation fails, perform any one of the following steps:

- To override the validation, run the following script from the `<YFS_HOME>` directory:

  ```
  ant –f bin/ycd_load_defaults.xml overrideinstall
  –logfile <logfile>
  ```

- To install only the non-conflicting activator data, run the following ant script from the `<YFS_HOME>` directory:

  ```
  ant –f bin/ycd_load_defaults.xml nonconflictinginstall
  –logfile <logfile>
  ```

Note: If the factory default installation stops before it is finished, the files, `ycd_addin_installer.xml.restart` and `ycd_pca_installer.xml.restart` are created depending on where the installation stopped. These files are located in the `<YFS_HOME>/database/FactorySetup/ycd/install` directory. These files record the location where the installation stopped, and are used to resume the installation when the factory defaults are installed the next time.

Note: If you plan to use the reference implementation provided with the Sterling Customer Order Management PCA solution, see Chapter 6, "Installing the Reference Implementation".

4.4.2 Loading the Store Order Management Database Factory Defaults

To load the database factory defaults for the Store Order Management user interface features:

1. Load the factory defaults by running the following ant script from the `<YFS_HOME>` directory:

```
ant -f bin/ycd_som_load_defaults.xml install -logfile
<logfile>
```

> **Note:** If the factory default installation stops before it is finished, the files, `ycd_som_pca_installer.xml.restart` and `ycd_som_pca_insertonly_installer.xml.restart` are created depending on where the installation stopped. These files are located in the `<YFS_HOME>/database/FactorySetup/ycd/install` directory. These files record the location where the installation stopped, and it is used to resume the installation when the factory defaults are installed the next time.

2. If you want to use the reference implementation provided with the Sterling Customer Order Management PCA, see Chapter 6, "Installing the Reference Implementation".

4.5 Installing Factory Defaults for WebSphere Commerce Integration

The database factory defaults for WebSphere Commerce integration include the implementations for new agents, services, and user exits that are used to provide and retrieve order and inventory information to and from the WebSphere Commerce application.

To load the WebSphere Commerce integration factory defaults:

1. Ensure that the path to the java executable is in your system path.

2. Make sure that the following files are configured correctly:

- yfs.properties

- migrator.properties
- log4jconfig.xml

For more information about these files, see the *Sterling Supply Chain Applications Installation Guide*.

3. Ensure that your <YFS_HOME> environment variable is correctly set up, and that your DB_DRIVER file is in your <YFS_HOME>/extn directory.

4. Load the factory defaults by executing the following ant script from the <YFS_HOME> directory:

```
ant -f bin/ycd_wci_load_defaults.xml full -logfile
<logfile>
```

5. Check the log file specified in Step 4 to see if the validation succeeded.

The same script can be used for Windows, UNIX, and LINUX. If you plan to use the reference implementation provided as a part of the Sterling Customer Order Management PCA with a WebSphere Commerce integration solution, see Section 6.3, "Installing the WebSphere Commerce Integration Reference Implementation".

4.6 Loading the Language Pack Translations

Prior to loading the Sterling Customer Order Management PCA Language Pack translations, ensure that you have successfully installed the database components for your database and loaded the database factory defaults.

To load the language pack translations with custom localization literals, you should run the LocalizedStringReconciler tool in IMPORT mode from the <YFS_HOME>/bin directory as follows:

```
ant -f localizedstringreconciler.xml import
-Dsrc=<YFS_HOME>/database/FactorySetup/ycd
```

This tool first inserts the values specified in the <from_language>_<from_country>_comlocalizedstrings_<to_language>_<to_country>.properties file present in the <YFS_HOME>/database/FactorySetup/ycd/<language>_<country> directory into the database.

5

Client Applications

This chapter explains how to create, install, and update a Sterling Customer Order Management PCA client application.

5.1 Creating a Client Application

This section explains how to create a client application.

> **Note:** The Application Identifier for the Sterling Customer Order Management PCA client is YFSSYS00011.

To create a client application:

1. Ensure that the following environment variable is set appropriately:

   RCP_EXTN_FOLDER—If you extend the Sterling Customer Order Management PCA, set this variable to point to the directory where the Sterling Customer Order Management PCA extended client application files are located. For more information about this variable, see the *Sterling Supply Chain Applications Installation Guide*.

   If you do not extend the Sterling Customer Order Management PCA, create a new directory and set this variable to point to the new directory. In the new directory, create the `resources` subdirectory.

2. Unzip the `<YANTRA_HOME>/Applications/Foundation/rcpclient/com.yantra.yfc.rcp_1.0.0.zip` file to a temporary location.

3. Within the temporary location, navigate to the following directory:

   `<UNZIP_DIR>/com.yantra.yfc.rcp_1.0.0`

4. Rename the `locations.ycfg.sample` file to `locations.ycfg`.

5. Update the `locations.ycfg file` with your configurations. For more information about creating and configuring locations, see the *Sterling Supply Chain Applications Customization Guide*.

6. Copy the `locations.ycfg` file to the `<RCP_EXTN_FOLDER>/resources` directory.

7. Make sure all the dependent Eclipse plugins are included in the `<YANTRA_HOME>/Applications/Foundation/rcpdependencies` directory. For a list of dependent Eclipse plug-ins that are needed, see the *Sterling Supply Chain Applications Installation Guide*.

5.1.1 Creating a Call Center Client Application

To create a call center client application:

1. Run the following Ant script from the `<YFS_HOME>` directory:

   - For Windows:

     ```
     ant -f bin/buildcomapplication.xml buildCOMForWindows
     -logfile <logfile>
     ```

   - For Linux:

     ```
     ant -f bin/buildcomapplication.xml buildCOMForGTKLinux
     -logfile <logfile>
     ```

2. After the Ant script completes, a zip file called `com.zip` is created in the `<YFS_HOME>/rcpdrop/[platform]` directory. For example, `<YFS_HOME>/rcpdrop/windows` for windows and `<YFS_HOME>/rcpdrop/gtk.linux.x86` for Linux.

   For more information on this extension process, see the *Sterling Supply Chain Applications Customization Guide*.

5.1.2 Creating a Store Application

1. Run the following ANT script from the `<YFS_HOME>` directory:

   - For Windows:

     ```
     ant -f bin/buildsomapplication.xml buildSOMForWindows
     -logfile <logfile>
     ```

- For Linux:

    ```
    ant -f bin/buildsomapplication.xml buildSOMForGTKLinux
    -logfile <logfile>
    ```

2. After the ANT script completes, a zip file called `som.zip` is created under `<YFS_HOME>/rcpdrop/[platform]` directory. For example, `<YFS_HOME>/rcpdrop/windows` for windows and `<YFS_HOME>/rcpdrop/gtk.linux.x86` for Linux.

    For more information on this extension process, see the *Sterling Supply Chain Applications Customization Guide*.

5.2 Installing Client Applications

This section explains how the Sterling Customer Order Management PCA call center and store client applications can be installed on Windows and Linux.

5.2.1 Installing a Call Center Client Application

This section provides the installation steps for a call center client application.

To install on Windows:

1. Extract the `com.zip` file into the `<YFS_HOME>/rcpdrop/windows/com` directory.

2. Modify the `<YFS_HOME>/rcpdrop/windows/com/com.ini` file to provide the appropriate VM arguments for the application.

    For more information about VM arguments, see the *Sterling Supply Chain Applications Customization Guide*.

To install on Linux:

1. Extract the `com.zip` file into the `<YFS_HOME>/rcpdrop/gtk.linux.x86/com` directory.

2. Modify the `<YFS_HOME>/rcpdrop/gtk.linux.x86/com/com.ini` file to provide the appropriate VM arguments for the application.

    For more information about the supported VM arguments, see the *Sterling Supply Chain Applications Installation Guide*.

> **Note:** Make sure that the execution permissions are
> turned ON for the following files:
>
> * com stored in the
>   `<YFS_HOME>/rcpdrop/gtk.linux.x86/com` directory.
>
> * All files stored in the
>   `<YFS_HOME>/rcpdrop/gtk.linux.x86/com/jre/bin`
>   directory.

5.2.2 Installing a Store Client Application

This section provides the installation steps for a store client application.

To install on Windows:

1. Extract the `som.zip` file into the `<YFS_HOME>/rcpdrop/windows/som` directory.

2. Modify the `<YFS_HOME>/rcpdrop/windows/som/som.ini` file to provide the appropriate VM arguments for the application.

   For more information about the supported VM arguments, see the *Sterling Supply Chain Applications Installation Guide*.

To install on Linux:

1. Extract the `som.zip` file into the `<YFS_HOME>/rcpdrop/gtk.linux.x86/som` directory.

2. Modify the `<YFS_HOME>/rcpdrop/gtk.linux.x86/som/som.ini` file to provide the appropriate VM arguments for the application.

   For more information about the supported VM arguments, see the *Sterling Supply Chain Applications Installation Guide*.

> **Note:** Make sure that the execution permissions are turned ON for the following files:
>
> - som stored in the `<YFS_HOME>/rcpdrop/gtk.linux.x86/som` directory.
>
> - All files stored in the `<YFS_HOME>/rcpdrop/gtk.linux.x86/som/jre/bin` directory.

5.3 Updating the Sterling Rich Client Platform for Client Applications

This section describes how to update the Sterling Rich Client Platform for a Call Center and the Store Order Management client applications.

5.3.1 For the Call Center Application

To update the Sterling Rich Client Platform for the call center application of the Sterling Customer Order Management PCA, create the following directory structure:

- For Windows:
  `<PCA_UPDATES_DIR>/<APPLICATION_CODE>/<PCA_VERSION_NUMBER>/win32.win32.x86`

- For Linux:
  `<PCA_UPDATES_DIR>/<APPLICATION_CODE>/<PCA_VERSION_NUMBER>/gtk.linux.x86`

where the APPLICATION_CODE is YFSSYS00011 for Sterling Customer Order Management PCA. The <PCA_UPDATES_DIR> is the directory that contains an individual update directory for each Sterling Supply Chain Applications PCA. The PCA_VERSION_NUMBER is the appropriate version of the PCA that is being installed. The `win32.win32.x86` directory is the directory for the Windows operating system configuration and `gtk.linux.x86` directory is the directory for the Linux operating system configuration.

For more information about applying updates, see the *Sterling Supply Chain Applications Installation Guide*.

5.3.2 For the Store Order Management Application

To update the Sterling Rich Client Platform for the store order management application of the Sterling Customer Order Management PCA, create the following directory structure:

- For Windows:
  <PCA_UPDATES_DIR>/<APPLICATION_CODE>/<PCA_VERSION_NUMBER>/win32.win32.x86

- For Linux:
  <PCA_UPDATES_DIR>/<APPLICATION_CODE>/<PCA_VERSION_NUMBER>/gtk.linux.x86

where the APPLICATION_CODE is YFSSYS00006 for Sterling Customer Order Management PCA. The <PCA_UPDATES_DIR> is the directory that contains an individual update directory for each Sterling Supply Chain Applications PCA. The PCA_VERSION_NUMBER is the appropriate version of the PCA that is being installed. The win32.win32.x86 directory is the directory for the Windows operating system configuration and gtk.linux.x86 directory is the directory for the Linux operating system configuration.

For more information about applying updates, see the *Sterling Supply Chain Applications Installation Guide*.

6

Installing the Reference Implementation

To load the factory setup for the reference implementation, ensure that your environment variable is set up correctly, and that your `DB_DRIVER` file is in your `<YFS_HOME>/extn` directory.

When loading the reference implementation data, the Sterling Customer Order Management PCA uses the Data Migrator. For more information about the Data Migrator, see the *Sterling Supply Chain Applications Installation Guide*.

6.1 Installing the Sterling Customer Order Management PCA Reference Implementation

To use this Reference Implementation, first configure the `ycd_ref_variable.properties` file located in the `<YFS_HOME>/resources` directory.

For more information about the organization model provided in the reference implementation, see the *Sterling Customer Order Management PCA Implementation Guide*.

The variables described in Table 6–1 can be used to create participants and users for the reference implementation.

Table 6–1   Variables for the Sterling Customer Order Management PCA Reference Implementation

Variable Name	Description
Corporate_Enterprise_Code	Use this variable to define the organization code of the company.
Corporate_Enterprise_Name	Use this variable to define the name of the company.

Table 6—1   Variables for the Sterling Customer Order Management PCA Reference Implementation

Variable Name	Description
Corporate_Enterprise_BillTo_Company	Use this variable to define the bill-to address of the company.
Corporate_Enterprise_Company_Name	Use this variable to define the corporate address of the company.
Online_Channel_Enterprise_Code	Use this variable to define the online business channel of the company.
Online_Channel_Enterprise_Name	This is the online business channel used for display purposes.
Online_Channel_Enterprise_BillTo_Company_Name	Use this variable to define the bill-to address of the online channel enterprise.
Online_Channel_Enterprise_Company_Name	This populates the company name field of the business channel's corporate address.
Non_Integrated_Node	This is the organization code created for a distribution center node of the online business channel organization.
Non_Integrated_Node_Name	This is the name of the distribution center code.
Generic_Service_Level_Carrier_Code	This is the organization code for the carrier organization created for the carrier service drop-down list.
CSR_UserName	This is the unique user name used to create a CSR for the company.
CSR_Password	This populates the password field for the CSR user record.
CSR_Lead_UserName	This is the unique user name used to create a CSR Lead for the company.
CSR_Lead_Password	This populates the password field for the CSR Lead user record.

The reference implementation can be run multiple times for a single installation. You can run this data with different Enterprise or Node_DC variables to create multiple online business channels for a company.

The YFS_LOCAL environment variable can be set to point to the directory containing the `<YFS_HOME>/resources/yfs.properties` file. This file is used to set the database connection, if available. Otherwise, `<YFS_HOME>` is used to set the database properties in the `<YFS_HOME>/resources/yfs.properties` directory.

For subsequent installations of the reference implementation, ensure that you delete the `*.restart` files located in the `<YFS_HOME>/database/FactorySetup/ycd/install` directory.

The reference implementation factory setup is comprised of the following components:

- Configuration Data—This consists of the basic configuration data required for the PCA including new organizations, common codes, and rules.

- Demo Data—This contains Master Data and Transaction Data.

  - Master Data—This consists of some example data that can be used to demonstrate the application including sample items. It is expected that this data is not used in a production environment.

  - Transaction Data—Transaction Data is not run as part of loading the reference implementation. You can optionally run this when installing the Sterling Customer Order Management PCA.

Validation is necessary to insert certain factory setup data including the implementation of events, user exits, and pipeline determination rules.

To validate the existing configuration, run the following command from the `<YFS_HOME>` directory:

```
ant -f bin/ycd_load_reference_implementation.xml validate
-logfile <logfile>
```

When you run this command, the system validates the following configurations:

- User Exit Implementation—The Sterling Customer Order Management PCA provides implementation for some of the user exits. If the user exit implementations are not modified or overridden, the validation process succeeds. Otherwise, it fails.

  The Sterling Customer Order Management PCA provides an implementation for the following user exits:

  - YFSCollectionCreditCardUE

- YFSCollectionOthersUE
- YFSCollectionStoredValueCardUE
- YFSBeforeCreateOrderUE
- YFSBeforeChangeOrderUE
- YFSProcessOrderHoldTypeUE
- OMPGetCarrierServiceOptionsForOrderingUE

- Pipeline Determination—The Sterling Customer Order Management PCA provides pipelines and associated pipeline determination rules. The validation process succeeds if the pipeline determination rules are not modified or overridden. Otherwise, the validation process fails.

  The pipeline determination rules for the following process types are validated:

  - ORDER_FULFILLMENT
  - RETURN_FULFILLMENT

- Events—The Sterling Customer Order Management PCA provides event handlers for some of the transactions. If the event handlers are modified or overridden, the validation fails. Otherwise, the validation succeeds.

  Table 6–2 lists the events for which the event handlers are configured:

Table 6–2   Events

Event	Transaction ID
On Collection Failure	PAYMENT_EXECUTION
On Backorder	ORDER_RELEASE_CHANGE
On Cancel	ORDER_RELEASE_CHANGE
On Success	DRAFT_ORDER_CONFIRM
On Success	ORDER_CHANGE
On Success	ORDER_CREATE
On Backorder	SCHEDULE.0001

Table 6–2   Events

Event	Transaction ID
On Cancel	SCHEDULE.0001
On Backorder	RELEASE.0001
On Cancel	RELEASE.0001
On hold type status change	ORDER_CHANGE
On hold type status change	ORDER_CREATE
On hold type status change	DRAFT_ORDER_CONFIRM
On hold type status change	ORDER_RELEASE_CHANGE
On Success	CHAINED_ORDER_CREATE
On Success	YCD_FRAUD_CHECK.0001
On hold type status change	YCD_FRAUD_CHECK.0001
On Fraudulent Order	YCD_FRAUD_CHECK.0001
On Success	YCD_DUPLICATE_ORDER.0001
On hold type status change	YCD_DUPLICATE_ORDER.0001
On Duplicate Order	YCD_DUPLICATE_ORDER.0001
Address Verification Failed	YCD_VERIFY_ADDRESS.0001
Send Notification	YCD_SHIP_NOTIFICATION.0001

If the validation process succeeds:

And the master data is required, run the following command from the `<YFS_HOME>` directory:

```
ant -f bin/ycd_load_reference_implementation.xml install
-Drunmasterdata=Y -logfile <logfile>
```

Otherwise, run the following ant script from the `<YFS_HOME>` directory:

```
ant –f bin/ycd_load_reference_implementation.xml install
–logfile <logfile>
```

If the validation process fails:

Override the configuration that is failing the activator and if:

— The master data is required, run the following command from the `<YFS_HOME>` directory:

```
ant –f bin/ycd_load_reference_implementation.xml
overrideinstall –Drunmasterdata=Y –logfile <logfile>
```

— The master data is not required, run the following command from the `<YFS_HOME>` directory:

```
ant –f bin/ycd_load_reference_implementation.xml
overrideinstall –logfile <logfile>
```

Otherwise, install only the non-conflicting activator data, and if:

— The master data is required, run the following ant script from the `<YFS_HOME>` directory:

```
ant –f bin/ycd_load_reference_implementation.xml
nonconflictinginstall –Drunmasterdata=Y –logfile
<logfile>
```

— The master data is not required, run the following ant script from the `<YFS_HOME>` directory:

```
ant –f bin/ycd_load_reference_implementation.xml
nonconflictinginstall –logfile <logfile>
```

6.1.1 Installing the Transaction Data

To install the transaction data:

1. Set the properties as described in Table 6–3 in the script applicable to your operating system.

   - For Windows, run the following command:
     `<YFS_HOME>/bin/ycd_load_transaction_data.cmd`

   - For UNIX or Linux, run the following command:
     `<YFS_HOME>/bin/ycd_load_transaction_data.sh`

Table 6–3   Setting Up the ycd_load_transaction_data Properties

Property	Description
<YFS_HOME>	Specify as <YANTRA_HOME>/Runtime directory.
DB_DRIVER	Specify this property as the full path to your database driver.
CLASSPATH	Add the <YFS_HOME>/extn/yfsdbextn.jar file to this property.
SERVER_CLASSES	Specify the relevant JAR files and patches. For more information about JAR files and patches, see the *Sterling Supply Chain Applications Installation Guide*.

2. From the <YFS_HOME>/bin directory:

- For Windows, run the following command:

  ycd_load_transaction_data.cmd transactiondata

- For UNIX or Linux, run the following command:

  ycd_load_transaction_data.sh transactiondata

Note: Before installing the transaction data:

- Ensure that the environment variable ANT_OPTS is set to -Xms512m -Xmx512m -XX:MaxPermSize=512m.

- Ensure that you have configured the Java Messaging Service. For more information about Java Messaging Service, see Section 7.4, "Configuring the Java Messaging Service for E-Mail Notifications".

- Ensure that the yifclient.properties file is set up correctly. For more information about setting up the yifclient.properties file, see the *Sterling Supply Chain Applications Installation Guide*.

- Ensure that the Application and JMS servers are running.

The transaction data is classified in one of the following categories:

- Inventory
- Order

6.1.1.1 Inventory

This transaction data contains the inventory adjustment data required to demonstrate the Sterling Customer Order Management PCA features.

To install this data, from the `<YFS_HOME>/bin` directory:

- For Windows, run the following command:
  `ycd_load_transaction_data.cmd inventorydata`

- For UNIX and Linux, run the following command:
  `ycd_load_transaction_data.sh inventorydata`

6.1.1.2 Order

This transaction data contains the order data required to demonstrate the Sterling Customer Order Management PCA features. The orders are grouped into:

- Demonstration1
- Demonstration2
- Demonstration3
- Demonstration4
- Demonstration5

6.1.1.2.1 Demonstration1

To create an order of demonstration1 type, from the `<YFS_HOME>/bin` directory:

- For Windows, run the following command:

  `ycd_load_transaction_data.cmd createDemo1Order`

- For UNIX and Linux, run the following command:

  `ycd_load_transaction_data.sh createDemo1Order.`

6.1.1.2.2 Demonstration2

To create an order of demonstration2 type, from the <YFS_HOME>/bin directory:

- For Windows, run the following command:

    ycd_load_transaction_data.cmd createDemo2Order

- For UNIX and Linux, run the following command:

    ycd_load_transaction_data.sh createDemo2Order.

6.1.1.2.3 Demonstration3

To create an order of demonstration3 type, from the <YFS_HOME>/bin directory:

- For Windows, run the following command:

    ycd_load_transaction_data.cmd createDemo3Order

- For UNIX and Linux, run the following command:

    ycd_load_transaction_data.sh createDemo3Order.

6.1.1.2.4 Demonstration4

To create an order of demonstration4 type, from the <YFS_HOME>/bin directory:

- For Windows, run the following command:

    ycd_load_transaction_data.cmd createDemo4Order

- For UNIX and Linux, run the following command:

    ycd_load_transaction_data.sh createDemo4Order.

6.1.1.2.5 Demonstration5

To create an order of demonstration5 type, from the <YFS_HOME>/bin directory:

- For Windows, run the following command:

    ycd_load_transaction_data.cmd createDemo5Order

- For UNIX and Linux, run the following command:

    ycd_load_transaction_data.sh createDemo5Order.

6.2 Installing the Store Order Management Reference Implementation

To use this Reference Implementation, first configure the `ycd_ref_variable.properties` file located in the `<YFS_HOME>/resources` directory.

For more information about the organization model provided with this reference implementation, see the *Sterling Customer Order Management PCA Implementation Guide*.

The variables described in Table 6–4 are used for the store order management reference implementation.

Table 6–4   Variables for the Store Order Management Reference Implementation

Variable Name	Description
Retail_Channel_Enterprise_Code	This is the organization code used to define the retail business channel.
Retail_Channel_Enterprise_Name	This is the name of the retail business channel used for display purposes.
No_Loc_StoreId	This is the organization code used to define a store with no location.
No_Loc_StoreName	This is the name of the no location store used for display purposes.
No_Loc_Store2Id	This is the organization code used to define another store with no location.
No_Loc_Store2Name	This is the name of No_Loc_Store2Id used for display purposes.
No_Loc_Store_Admin_UserID	This is a variable that defines the identifier for the store administrator of a store with no locations.
No_Loc_Store_Admin_UserName	This is a variable that defines the user name for the store administrator of a store with no locations.
No_Loc_Store_CSR_UserId	This is a variable that defines the identifier for a CSR of a store with no locations.
No_Loc_Store_CSR_UserName	This is a variable that defines the user name for a CSR of a store with no locations.

Table 6–4   Variables for the Store Order Management Reference Implementation

Variable Name	Description
No_Loc_Store2_Admin _UserID	This is a variable that defines the identifier for a store administrator of No_Loc_Store2Id store.
No_Loc_Store2_Admin _UserName	This is a variable that defines the user name for the No_Loc_Store2_Admin_UserID store administrator.
No_Loc_Store2_CSR_U serId	This is a variable that defines the identifier for a CSR of the No_Loc_Store2Id store.
No_Loc_Store2_CSR_U serName	This is a variable that defines the user name for the No_Loc_Store2_CSR_UserId CSR.

For subsequent installations of this reference implementation, ensure that you delete the `*.restart` files located in the `<YFS_HOME>/database/FactorySetup/ycd/install` directory.

The reference implementation factory setup is comprised of the following components:

- Configuration Data—This consists of the basic configuration data required for the PCA including new organizations, common codes, and rules.

- Demo Data—This contains Master Data and Transaction Data.

  – Master Data—This consists of some example data that can be used to demonstrate the application including sample items. It is expected that this data is not used in a production environment.

  – Transaction Data—Transaction Data is not run as part of loading the reference implementation. You can optionally run this when installing the Sterling Customer Order Management PCA.

Validation is necessary to insert certain factory setup data including the implementation of events, user exits, and pipeline determination rules.

To validate the existing configuration, run the following command from the `<YFS_HOME>` directory:

```
ant -f bin/ycd_load_reference_implementation.xml validate
-logfile <logfile>
```

When you run this command, the system validates the provided pipelines and associated pipeline determination rules. The validation process

succeeds if the pipeline determination rules are not modified or overridden. Otherwise, the validation process fails.

The pipeline determination rules for the following process types are validated:

- ORDER_FULFILLMENT

- RETURN_FULFILLMENT

If the validation process succeeds:

And the master data is required, run the following command from the `<YFS_HOME>` directory:

```
ant -f bin/ycd_som_load_reference_implementation.xml
install -Drunmasterdata=Y -logfile <logfile>
```

Otherwise, run the following ant script from the `<YFS_HOME>` directory:

```
ant -f bin/ycd_som_load_reference_implementation.xml
install -logfile <logfile>
```

If the validation process fails:

Override the configuration that is failing the activator and if:

- **–** The master data is required, run the following command from the `<YFS_HOME>` directory:

  ```
  ant -f bin/ycd_som_load_reference_implementation.xml
  overrideinstall -Drunmasterdata -logfile <logfile>
  ```

- **–** The master data is not required, run the following command from the `<YFS_HOME>` directory:

  ```
  ant -f bin/ycd_som_load_reference_implementation.xml
  overrideinstall -logfile <logfile>
  ```

Otherwise, install only the non-conflicting activator data, and if:

- **–** The master data is required, run the following ant script from the `<YFS_HOME>` directory:

  ```
  ant -f bin/ycd_som_load_reference_implementation.xml
  nonconflictinginstall -Drunmasterdata -logfile <logfile>
  ```

- **–** The master data is not required, run the following ant script from the `<YFS_HOME>` directory:

```
ant -f bin/ycd_som_load_reference_implementation.xml
nonconflictinginstall -logfile <logfile>
```

6.2.1 Installing the Transaction Data

To install the transaction data:

1. Set the properties as described in Table 6–3 in the script applicable to your operating system.

- For Windows, run the following command:
  `<YFS_HOME>/bin/ycd_som_load_transaction_data.cmd`

- For UNIX or Linux, run the following command:
  `<YFS_HOME>/bin/ycd_som_load_transaction_data.sh`

Table 6–5 Setting Up the ycd_som_load_transaction_data Properties

Property	Description
<YFS_HOME>	Specify as `<YANTRA_HOME>/Runtime` directory.
DB_DRIVER	Specify this property as the full path to your database driver.
CLASSPATH	Add the `<YFS_HOME>/extn/yfsdbextn.jar` file to this property.
SERVER_CLASSES	Specify the relevant JAR files and patches. For more information about the JAR files and patches, see the *Sterling Supply Chain Applications Installation Guide*.

2. From the `<YFS_HOME>/bin` directory, run `ycd_som_load_transaction_data.cmd transactiondata` for Windows, or run `ycd_som_load_transaction_data.sh transactiondata` for UNIX or Linux.

> **Note:** Before running the transaction data:
>
> - Ensure that the environment variable ANT_OPTS is set to -Xms512m -Xmx512m -XX:MaxPermSize=512m.
>
> - Ensure that you have configured the Java Messaging Service. For more information about Java Messaging Service, see Section 7.4, "Configuring the Java Messaging Service for E-Mail Notifications".
>
> - Ensure that the `yifclient.properties` file is set up correctly. For more information about setting up the `yifclient.properties` file, see the *Sterling Supply Chain Applications Installation Guide*.
>
> - Ensure that the Application and JMS servers are running.

You can run the transaction data independently for the following categories:

- Inventory
- Order

6.2.1.1 Inventory

This contains the inventory adjustment data required to demonstrate the Sterling Customer Order Management PCA features. To install this data, from the `<YFS_HOME>/bin` directory:

- For Windows, run the following command:

  `ycd_som_load_transaction_data.cmd inventorydata`

- For UNIX and Linux, run the following command:

  `ycd_som_load_transaction_data.sh inventorydata`.

6.2.1.2 Order

This contains the order data required to demonstrate the Sterling Customer Order Management PCA features. The orders are further classified into:

- Demonstration1

- Demonstration2
- Demonstration3
- Demonstration4
- Demonstration5

6.2.1.2.1 Demonstration1

To create an order of demonstration1 type, from the `<YFS_HOME>/bin` directory:

- For Windows, run the following command:

  `ycd_som_load_transaction_data.cmd createDemo1Order`

- For UNIX and Linux, run the following command:

  `ycd_som_load_transaction_data.sh createDemo1Order`

6.2.1.2.2 Demonstration2

To create an order of demonstration2 type, from the `<YFS_HOME>/bin` directory:

- For Windows, run the following command:

  `ycd_som_load_transaction_data.cmd createDemo2Order`

- For UNIX and Linux, run the following command:

  `ycd_som_load_transaction_data.sh createDemo2Order`

6.2.1.2.3 Demonstration3

To create an order of demonstration3 type, from the `<YFS_HOME>`/bin directory:

- For Windows, run the following command:

  `ycd_som_load_transaction_data.cmd createDemo3Order`

- For UNIX and Linux, run the following command:

  `ycd_som_load_transaction_data.sh createDemo3Order`

6.2.1.2.4 Demonstration4

To create an order of demonstration4 type, from the `<YFS_HOME>`/bin directory:

- For Windows, run the following command:

  `ycd_som_load_transaction_data.cmd createDemo4Order`

- For UNIX and Linux, run the following command:

  `ycd_som_load_transaction_data.sh createDemo4Order`

6.2.1.2.5 Demonstration5

To create an order of demonstration5 type, from the `<YFS_HOME>`/bin directory:

- For Windows, run the following command:

  `ycd_som_load_transaction_data.cmd createDemo5Order`

- For UNIX and Linux, run the following command:

  `ycd_som_load_transaction_data.sh createDemo5Order`

6.3 Installing the WebSphere Commerce Integration Reference Implementation

To load the factory setup for this reference implementation, you should ensure that your environment variable is set up correctly, and that your DB_DRIVER file is in your `<YFS_HOME>`/extn directory.

When loading the database factory defaults, the Sterling Customer Order Management PCA uses the Data Migrator. For more information about the

Data Migrator, see the *Sterling Supply Chain Applications Installation Guide*. To use the Reference Implementation, first configure the `ref_ycd_variable.properties` file located in the `<YFS_HOME>/resources` directory.

The variable described in Table 6–6, "Variable for Reference Implementation", is used to create charge categories and an inventory monitor rule for the enterprise that is created while running the Sterling Customer Order Management PCA reference implementation.

Table 6–6   Variable for Reference Implementation

Variable Name	Description
Corporate_Enterprise_ Code	The organization code used to define the company.

The reference implementation can be run multiple times for a single installation. You can run this data with different Enterprise organizations to create the provided customer data for each organization that is created with the Sterling Customer Order Management PCA reference implementation.

The `YFS_LOCAL` environment variable can be set to point to the directory containing the `<YFS_HOME>/resources/yfs.properties` file. This is picked up and used to set the database connection, if available. Otherwise, `<YFS_HOME>` is used to set the database properties in the `<YFS_HOME>/resources/yfs.properties` directory.

For subsequent installations of factory defaults, ensure that you delete the `.restart` files located in the `<YFS_HOME>/database/FactorySetup/ycd/install` directory. The reference implementation factory setup is broken up into the following components:

- Configuration Data—This consists of the basic configuration data required for the WebSphere Commerce integration including new charge categories, inventory monitoring rules, and status modification repricing.

- Activator—In the Activated mode, the newly provided events in the factory setup are activated. Validation is necessary to ensure the activation does not affect existing configurations. A validator executes on these tables. If any of the records in the tables are found to exist in a state different than the standard Sterling Supply Chain

Applications factory setup, the validator fails. In such situations, you can run the reference implementation without the activator and manually create these records, or run the activator factory setup in override mode.

- Master Data—This consists of updating the existing master data that can be run as part of the Sterling Customer Order Management PCA reference implementation to update the provided items with a default inventory monitoring rule. This causes the provided items to be picked up by the Real Time Availability Monitor, and adjust the inventory cache within WebSphere Commerce, version 6.0.0.1.

To run the complete reference implementation, run the following command from the `<YFS_HOME>` directory:

```
ant -f bin/ycd_wci_load_reference_implementation.xml all
-logfile <logfile>
```

This command runs the complete reference implementation including the configuration data, activator, and master data installation.

> **Note:** If you modify the tables referenced in the activator factory setup, the activator validation may fail. In such situations, you can run the factory setup components separately. If errors are not found, it indicates that the factory setup has been installed successfully.

To run individual components of the reference implementation, run the following commands from the `<YFS_HOME>` directory:

- Configuration Data Installation—Run the following command to install configuration data:

  ```
  ant -f bin/ycd_wci_load_reference_implementation.xml
  configurationdata -logfile <logfile>
  ```

- Activator Installation—Run the following command to install activator:

  ```
  ant -f bin/ycd_wci_load_reference_implementation.xml
  activator -logfile <logfile>
  ```

- Activator Installation with Override—Run the following command to overwrite any existing configuration done to certain event or user exit implementations:

```
ant -f bin/ycd_wci_load_reference_implementation.xml
overrideactivator -logfile <logfile>
```

7

Deploying the Sterling Customer Order Management PCA

This chapter explains how to deploy the Sterling Customer Order Management PCA after running the runtime.

7.1 Rebuilding the Enterprise Archive File

To deploy the Sterling Customer Order Management PCA on WebLogic or WebSphere, you must recreate the Sterling Supply Chain Applications Enterprise Archive Package.

> **Note:** If you use Jasper for generating reports, before recreating the Sterling Supply Chain Applications Enterprise Archive Package, make sure that the following jar files are available in the `<YFS_HOME>/lib` directory:
>
> - `barbecue-1.0.6b`
> - `commons-beanutils-1.5`
> - `commons-collection-2.1`
> - `commons-digester-1.7`
> - `commons-logging-1.0.2`
> - `itext-1.3.1`
> - `jasperreports-1.2.0`

For more information about creating and deploying the Enterprise Archive, see the *Sterling Supply Chain Applications Installation Guide*.

7.2 Setting Up the Agent Server

If you have not already set up the Agent Server and Agent Trigger when installing the Sterling Customer Order Management PCA, ensure that you set up the Agent Server and Agent Trigger. For more information about setting up the Agent Server and Agent Trigger, see the *Sterling Supply Chain Applications Installation Guide*.

To set up the CLASSPATH of the Sterling Customer Order Management PCA Agent Server, include the classpath `ycdbe.jar`, `ycdbridge.jar` and `ycdshared.jar` in the agentServer and triggerAgent script files. The agentServer and triggerAgent script files are stored in the `<YFS_HOME>/bin` directory.

7.3 Setting Up the Integration Server

If you have not already set up the Integration Server when installing the Sterling Customer Order Management PCA, ensure that you set up the Integration Server. For more information about setting up the Integration Server, see the *Sterling Supply Chain Applications Installation Guide*.

To set up the CLASSPATH of the Sterling Customer Order Management PCA Integration Server, include the classpath `ycdbe.jar`, `ycdbridge.jar` and `ycdshared.jar` in the integrationServer script files. The `integrationServer` script files are stored in the `<YFS_HOME>/bin` directory.

7.4 Configuring the Java Messaging Service for E-Mail Notifications

Your Java Messaging Service (JMS) setup needs to have the following configuration:

* JMS Connection Factory must be named AGENT_QCF.

* JMS Queue must be named YCD_EmailQueue.

Ensure that the JMS component for the alert and e-mail services are set up correctly for the Provider URL parameter.

If you are using WebLogic, ensure at this point that your WebLogic JARs are placed before the Sterling Supply Chain Applications and Sterling Customer Order Management PCA JARs in your CLASSPATH environment

variable. This sequence ensures that the HTML tags do not show as text in the contents of an e-mail notification.

For more information about configuring JMS, see the *Sterling Supply Chain Applications Platform Configuration Guide* and your application server configuration guide.

7.5 Setting Up the Configuration Deployment Tool

If you have not already set up the Configuration Deployment Tool (CDT) when installing the Sterling Supply Chain Applications, ensure that you set up the CDT. For more information about setting up CDT, see the *Sterling Supply Chain Applications Installation Guide*.

Additionally, in the `ydk` script file, which is located in the `<YFS_HOME>/bin` directory, include the following `.jar` files in the CLASSPATH environment variable:

- `<YFS_HOME>/extn/yfsdbextn.jar`

- `<YFS_HOME>/lib/ycdshared.jar`

- `<YFS_HOME>/lib/ycdbe.jar`

8

Launching the Application

This chapter explains how to launch the Sterling Customer Order Management PCA.

8.1 Launching the Call Center Client Application

You can launch the call center client application on Windows and Linux.

To launch the call center client application:

1. Install the call center client application. For more information about installing the call center client application, see Section 5.2.1, "Installing a Call Center Client Application".

2. Double-click on the `com.exe` file.

8.2 Launching the Store Order Management Client Application

This section explains how to launch the store order management client application on Windows and Linux.

To launch the store order management client application:

1. Install the store order management client application. For more information about installing the store order management client application, see Section 5.2.2, "Installing a Store Client Application".

2. Double-click on the `som.exe` file.

Index