

IBM Sterling Gentran:Director Connection

Getting Started Guide



4108-540-GETS01-0004

This edition applies to the 5.5 Version of IBM® Sterling
Gentran:Director® Connection and to all subsequent releases and
modifications until otherwise indicated in new editions.

Before using this information and the product it supports, read the
information in “Notices” on page N- 1.

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IBM® Sterling Gentran:Director® Connection

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Preface

Welcome to IBM® Sterling:Gentran Director® Connection, consisting of IBM® Sterling Connection Manager 6.2, IBM® Sterling Commerce:Mail 6.2 and IBM® Sterling Gentran:Director® 5.5.

This guide provides information to help you understand the order of installation and configuration tasks and the information and resources you need before installing or upgrading.

This guide assumes that you are familiar with PCs and Microsoft® Windows operating system.

Product overview

Sterling Gentran:Director comprises data translation, process control, and communication components. It is designed primarily for the translation and communication of EDI and other similar types of data.

Task overview

If you are a new customer installing Sterling Gentran:Director Connection for the first time, follow the instructions in **Chapter 1, *Installation for New Customers***.

If you are an existing customer upgrading your Sterling Gentran:Director Connection, follow the instructions in **Chapter 2, *Upgrade for Existing Customers***.

What You Should Have Received

Product and documentation

The Sterling Gentran:Director Connection product and documentation are available by way of electronic download and CD-ROM.

If you elected to receive CD-ROMs, your package should include the following items:

- Sterling Gentran:Director Connection CD-ROM
- Sterling Gentran:Director Connection Documentation CD-ROM

If you did not receive the following items, please contact IBM Customer Support for IBM® Sterling Gentran® products.

If you elected to download from the Internet, you will have received instructions for downloading. You will also need to follow the **Downloading from the Internet** instructions on page 3.

Standards

If you have purchased the Application Integration, Sterling Gentran:Director Forms Integration or Sterling Gentran:Director TDF Integration software, your package will also include the following:

- Sterling Standards for EDI Installation card
- Sterling Standards for EDI CD-ROM

If you elected to download from the Internet, you will not receive a standards CD-ROM. Instead, you will need to use the Standards Installation card to download the standards.

Downloading from the Internet

Download the product .zip file from the Internet

To download the product from the Internet:

1. Find the Sterling Gentran:Director Connection product and click **Download**.
2. In the File Download dialog box, click **Save**.
3. When the Save As dialog box opens, save the compressed product file to the C:\ drive.
4. Decompress the product file.

Download documentation .zip file from the Internet

To download the documentation from the Internet:

1. Find Sterling Gentran:Director Connection documentation and click **Download**.
 2. In the File Download dialog box, click **Save**.
 3. When the Save As dialog box opens, save the compressed documentation file to the C:\ drive.
 4. Decompress the documentation file.
-

Customer Support

IBM provides a full range of customer support. Check your maintenance contract for details about the type of support you have purchased for your product.

Before Contacting Customer Support

Before contacting IBM Customer Support, review the documentation provided with your product. The documentation may help you identify or resolve the problem you are experiencing.

Ensure that you have the following information ready when you contact customer support:

- Your name and telephone number
- Your company name
- Your mailbox number (A mailbox number is assigned to customers who have a mailbox on the IBM network.)
- Your product name and version number
- Your computer platform
- A detailed description of the problem, including any error messages
- What led to the problem
- What actions you have taken to try to diagnose or solve the problem

How to Get Help

IBM® Sterling Customer Center provides a wealth of online resources that are available around the clock to enrich your business experience with Sterling Gentran. By using Sterling Customer Center, you gain access to many self-support tools, including a Knowledge-Base, Documentation, Education, and Case Management. Access Sterling Customer Center at <http://customer.sterlingcommerce.com>.

Once logged in, select **Support Center** from the top navigation menu, and then locate Sterling Gentran product-specific support information from the left navigation menu.

Additionally, our Customer Support Reference Guide outlines our support hours, contact information, and key information that will enhance your support experience with us. For detailed information about Customer Support, please refer to the Customer Support Reference Guide accessible from the login page. (<http://customer.sterlingcommerce.com>)

Installation for New Customers

Installation Roadmap

The following table describes the order of tasks to complete and references the following products:

- IBM® Sterling Gentrans:Director® Application Integration
- IBM® Sterling Gentrans:Director® FTP Option
- IBM® Sterling Gentrans:Director® Forms Integration
- IBM® Sterling Gentrans:Director® TDF Integration
- IBM® Sterling Standards for EDI

Stage	Description	Section
1	<p>Complete the three pre-installation checklists:</p> <ul style="list-style-type: none"> ■ Hardware requirements ■ Software requirements ■ Trading partner information <p>Note For instructions on determining the software requirements in the checklists, see <i>Frequently Asked Questions</i> beginning on page 71.</p>	<p>Getting Ready to Install on page 10</p>
2	<p>If your system does not have MDAC 2.8 installed, install it from the Sterling Gentran:Director Connection CD-ROM.</p>	<p>Installing Microsoft Data Access Components on page 14</p>
3	<p>Install Sterling Gentran:Director.</p>	<p>Installing Sterling Gentran:Director on page 16</p>
<p><i>Continued on next page</i></p>		
4	<p>Set up mailbox profiles.</p>	<p>Setting Up Mailboxes on page 32</p>
5	<p>If you purchased the Sterling Gentran:Director FTP Option, install the Sterling Gentran:Director FTP Option communication scripts. Otherwise, skip this step.</p>	<p>Installing the Sterling Gentran:Director FTP Option Communication Scripts on page 25</p>

Stage	Description	Section
6	If you installed Sterling Gentran:Director Application Integration, Sterling Gentran:Director Forms Integration, or Sterling Gentran:Director TDF Integration, install the Sterling Standards for EDI. Otherwise, skip this step.	See the Sterling Standards for EDI card for instructions.
7	Log on to Sterling Gentran:Director for the first time, using the default user ID and password. Change the default password.	<i>Changing the Default Password</i> on page 38
8	Add users to the Sterling Gentran:Director system.	<i>Adding Users to the System</i> on page 40
9	Perform validation tests on the system.	<i>Validating your system</i> on page 43

Getting Ready to Install

Before the installation, you must complete several prerequisites, such as installing or upgrading any third-party software to meet the minimum requirements for Sterling Gentran:Director.

Pre-installation checklists

The following categories of information need to be verified before installing Sterling Gentran:Director:

- Hardware requirements
- Software requirements
- Trading partner information

Each of these areas is covered in the pre-installation checklists that follow. Complete each checklist and ensure that all requirements are met before you install Sterling Gentran:Director.

Note

If you have questions about how to find some of the software information, see *Frequently Asked Questions* beginning on page 71.

Hardware requirements

Hardware Requirements	
	Requirement met? (✓)
150 MB free disk space	Yes <input type="checkbox"/> No <input type="checkbox"/>
Processor size and speed: See the Microsoft documentation or Web site for their recommendations for the operating system you are using. The Microsoft Web site is: http://www.microsoft.com .	Yes <input type="checkbox"/> No <input type="checkbox"/> <i>Continued on next page</i>

Hardware Requirements	
	Requirement met? (✓)
RAM: See the Microsoft Web site for their recommendations for the operating system you are using. The Microsoft Web site is: http://www.microsoft.com .	Yes <input type="checkbox"/> No <input type="checkbox"/>
Hayes®-compatible modem with MNP or V.42 support with a minimum baud rate of 28800 (higher rate recommended) –or– Dialup connection to an Internet Service Provider (ISP) or a LAN connection with ports 110 and 25 open Note If you are planning to connect to a VAN other than Sterling Information Broker and do not know the protocol you need, please contact Customer Support. See <i>Customer Support</i> on page 4.	Yes <input type="checkbox"/> No <input type="checkbox"/>
CD-ROM drive (Required for installation, optional for updates.)	Yes <input type="checkbox"/> No <input type="checkbox"/>
DVD drive (Optional for installing Standards updates. You can also download them from the Sterling Support Center Web site.)	Yes <input type="checkbox"/> No <input type="checkbox"/>
SVGA color monitor	Yes <input type="checkbox"/> No <input type="checkbox"/>
Mouse	Yes <input type="checkbox"/> No <input type="checkbox"/>

Software requirements

Software Requirements	
	Requirement Met? (✓)
<p>Operating System: Must be one of the following operating systems, at the version and service pack level listed.</p> <ul style="list-style-type: none"> ■ Windows 2000 Professional, v. 5.0, SP4 ■ Windows XP Professional, v. 1.0, SP2 	Yes <input type="checkbox"/> No <input type="checkbox"/>
<p>Microsoft Data Access Components (MDAC) v. 2.8 or higher</p> <p>Note MDAC v. 2.8 is included on the Sterling Gentran:Director Connection product CD-ROM. See <i>Installing Microsoft Data Access Components</i> on page 14 for installation instructions. To determine which version of MDAC you have, see <i>Frequently Asked Questions</i> beginning on page 71.</p>	Yes <input type="checkbox"/> No <input type="checkbox"/>
<p>Microsoft Internet Explorer 5.0 or higher</p>	Yes <input type="checkbox"/> No <input type="checkbox"/>

**Trading partner
information**

Information to get from your Trading Partner		
Information	Example	Requirement Met? (✓)
Trading Partner Name	ABC Company	Yes <input type="checkbox"/> No <input type="checkbox"/>
Document(s) you will be trading with this partner	850 Purchase Order or 810 Invoice	Yes <input type="checkbox"/> No <input type="checkbox"/>
Standards	ANSI, UCS, VICS, or EDIFACT	Yes <input type="checkbox"/> No <input type="checkbox"/>
Template Version	3020, 3040, or 4010	Yes <input type="checkbox"/> No <input type="checkbox"/>
Trading Partner EDI Qualifier	01, 12, 08, or ZZ	Yes <input type="checkbox"/> No <input type="checkbox"/>
Trading Partner EDI Code	Duns number or telephone number	Yes <input type="checkbox"/> No <input type="checkbox"/>

Installing Microsoft Data Access Components

To install the Microsoft Data Access Components v. 2.8, complete the following steps.

Reference

If you are not sure whether you need to install v. 2.8, see ***How do I find out what version of MDAC is running on the computer?*** on page 72

Step	Action
1	Turn on your PC and close any open applications. Note You may be prompted to reboot after the installation is complete.
2	Insert the Sterling Gentran:Director Connection product CD-ROM into your CD-ROM drive. System response The Sterling Gentran:Director Connection splash screen is displayed.
3	Navigate to the Mdac folder.
4	Double-click the file named mdac_typ.exe . System response The MDAC installation program End User License is displayed.
5	After reading the license, select the check box and click Next . System response The setup program checks for available disk space and programs or files on your system that it will replace but that are currently in use by another program. <i>Continued on next page</i>

Step	Action
6	<p>If Setup finds files that are in use, it will warn you that you need to reboot the PC after setup is complete. Click Next.</p> <p>System response The Installing the Software screen is displayed.</p>
7	Click Finish .
8	<p>When the MDAC setup is complete, you are prompted to choose whether to let the Setup program reboot the system immediately or to end Setup and reboot manually later.</p> <p>Choose the option desired and click Finish.</p>
9	<p>If you chose to have Setup reboot the system now, the system is rebooted. Log on to the system as usual.</p> <p>If you chose to reboot the system yourself, the Setup program exits.</p>

Preparing for the Remote Installations Call

Once your system meets all the prerequisites, you are ready for your installation call with the Remote Installations group. If you have not set a date for the installation, please call the Remote Installations group at 877-432-4300 (option 5) to speak with a Remote Installations analyst and set up an appointment.

The Remote Installations analyst may request that you fax your completed checklists. This allows them to review the checklists with you and become familiar with your system and software. The analyst will give you the fax number.

Installing Sterling Gentran:Director

Make sure you have the following items

- The Sterling Gentran:Director Connection CD-ROM

Note:

If you downloaded Sterling Gentran:Director 5.5 from the Internet, start with Step 4 in the procedure below.

- The completed pre-installation checklists from this guide
- An ISP user ID and password (if applicable)
- A Local Area Network ID(s) and password(s) (if applicable)
- If you are upgrading, a IBM mailbox ID and password

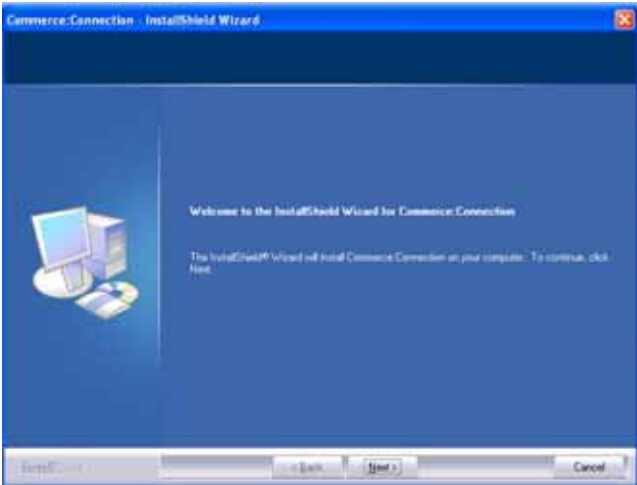
Procedure

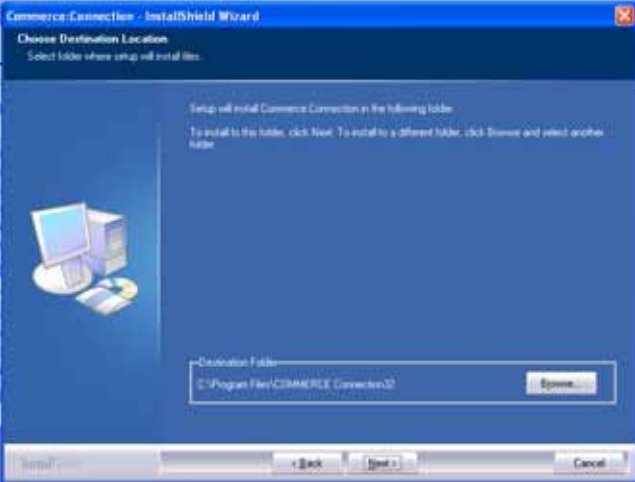
Note:

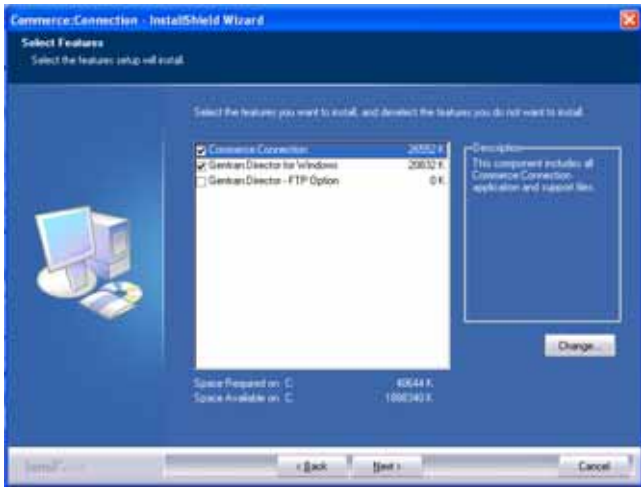
The Sterling Gentran:Director Executive icon has changed to an IBM logo that appears in your system tray.


To install Sterling Gentran:Director, complete the following steps:

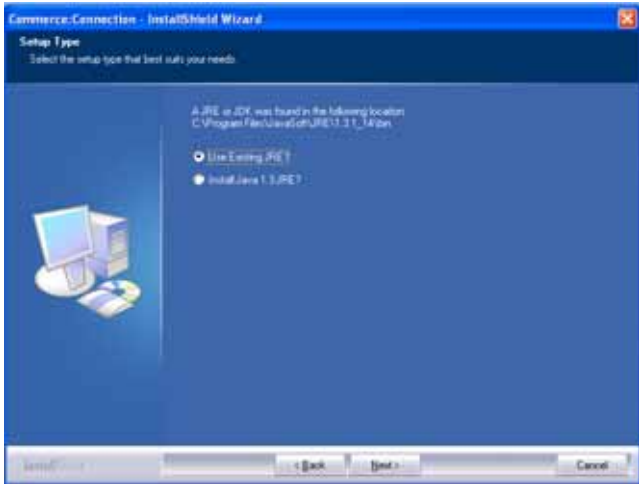
Step	Action
1	Turn on your PC and close any open applications. Note: Sterling Gentran:Director is designed/licensed to be installed to a local drive. If you need to use Terminal Server or any other type of remote desktop tool to install or implement Sterling Gentran:Director, please contact your IBM Sales Representative to discuss other IBM products that are designed for you environment and needs. The use of any remote desktop tool with Sterling Gentran:Director could produce undesirable results which will impact your business and will suspend your support of Sterling Gentran:Director, from IBM Customer Support, until the software is loaded in a supportable environment.

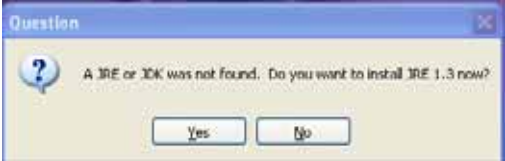
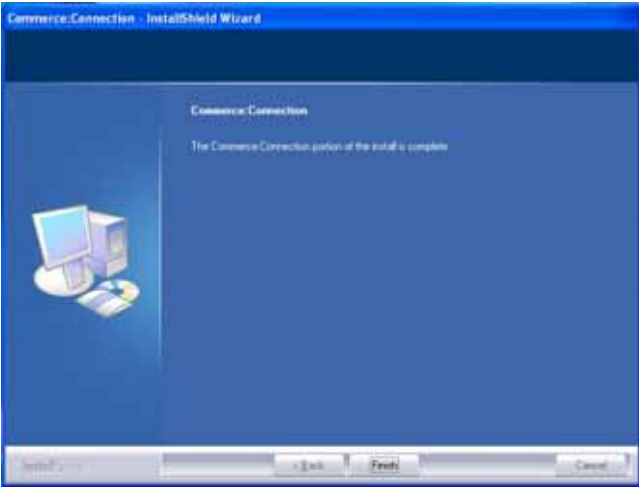
Step	Action
2	<p>Insert the Sterling Gentran:Director Connection product CD-ROM into your CD-ROM drive.</p> <p>System response The Sterling Gentran:Director Connection Welcome screen is displayed.</p> <p>Note If the Welcome screen does not appear, go to step 4.</p>
3	Click Next and go to step 5.
4	<p>From the Start menu, select Run. In the field, type “<drive>:\setup” and click OK.</p> <p>Note <drive> is the letter associated with your CD-ROM drive. For example, D:\setup.</p> <p>System response Setup prepares the Wizard that guides you through the install program and displays the Welcome screen.</p>  <p style="text-align: right;"><i>Continued on next page</i></p>


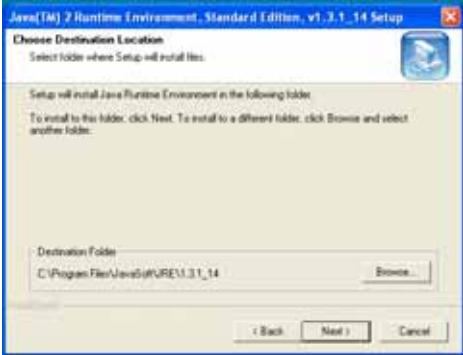
Step	Action
5	<p>Click Next.</p> <p>System response The Choose Destination Location screen is displayed.</p>  <p><i>Continued on next page</i></p>

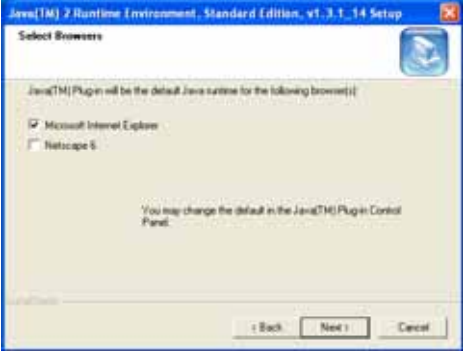

Step	Action
6	<p>Do you want to install Sterling Gentran:Director in the default folder?</p> <ul style="list-style-type: none"> ■ If yes, click Next. ■ If <i>no</i>, click Browse to select the folder. Click OK to exit the Browse dialog box, and click Next. <p>System response The Select Features screen is displayed.</p> 

Step	Action
7	<p>Do the following:</p> <ul style="list-style-type: none">■ Make sure both Sterling Gentran:Director Connection and Sterling Gentran:Director are selected.■ If you have purchased the Sterling Gentran:Director FTP Option, click the check box to its left. <p>System response</p> <p>The setup program installs Sterling Gentran:Director Connection and/or Sterling Gentran:Director and its components. The Sterling Gentran:Director Connection for the Internet Setup dialog box is displayed.</p>  <p><i>Continued on next page</i></p>

Step	Action
8	<p>Do one of the following:</p> <ul style="list-style-type: none"> ■ If you want to set up your mailbox, select Run the Mailbox Wizard and click Next. The Mailbox Wizard Welcome dialog box is displayed. Continue with Setting Up Mailboxes on page 32 and then return here when that is complete. ■ If you do not want to set up your mailbox right now, select Skip Mailbox Setup and click Next. You can run the Wizard later using Connection Manager or Sterling Commerce:Mail®. <p>If you purchased the Sterling Gentran:Director FTP Option, continue with Step 9. Otherwise, continue with Step 10.</p>
9	<p>Click Next.</p> <p>System response</p> <p>The setup looks for an existing version of Java.</p> <ul style="list-style-type: none"> ■ If it finds an existing version, the following screen is displayed.  <p>Make a selection and click Next.</p> <p style="text-align: right;"><i>Continued on next page</i></p>

Step	Action
	<ul style="list-style-type: none">■ If it does not find an existing version of Java, the following dialog is displayed. ■ If you want to install Java now, click Yes.■ If you click No, another dialog is displayed telling you that you will need to manually install Java. Click OK. <p>Note: You will not be able to use the Sterling Gentran:Director FTP Option until a version of Java is install and your computer is restarted.</p>
10	<p>System response The following screen is displayed.</p>  <p><i>Continued on next page</i></p>

Step	Action
11	<p>Click Finish.</p> <p>System response If you are not automatically installing Java for the Sterling Gentran:Director FTP Option, your installation is complete. Otherwise, the following License Agreement is displayed.</p> 
12	<p>Click Yes.</p> <p>System response The Choose Destination Location screen is displayed.</p>  <p style="text-align: right;"><i>Continued on next page</i></p>

Step	Action
13	<p>Keep the default or click Browse to select a new folder. Click Next.</p> <p>System response The Select Browsers screen is displayed.</p> 
14	<p>Select one of both of the browsers and click Next.</p> <p>System response The InstallShield Wizard Complete screen is displayed.</p> 
15	<p>Make a selection and click Finish.</p> <p>Note: The new version of Java will not be in effect until your computer is restarted.</p>

Installing the Sterling Gentran:Director FTP Option Communication Scripts

Introduction

If you have purchased the Sterling Gentran:Director FTP Option, you must install the Communication Scripts *after* completing the installation of Sterling Gentran:Director and Sterling Gentran:Director Connection.

Note:

The Sterling Gentran:Director FTP Option Communication Scripts will only install if you have installed Sterling Gentran:Director 5.5 and the Sterling Gentran:Director FTP Option.

Make sure you have the following items

- The Sterling Gentran:Director FTP Option Communication Scripts CD-ROM

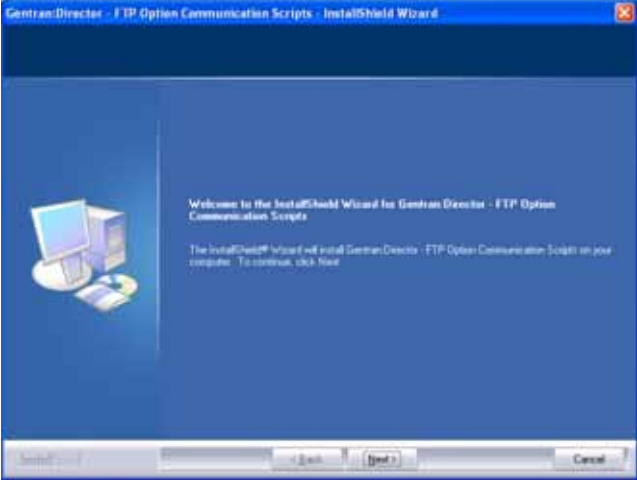
Note:

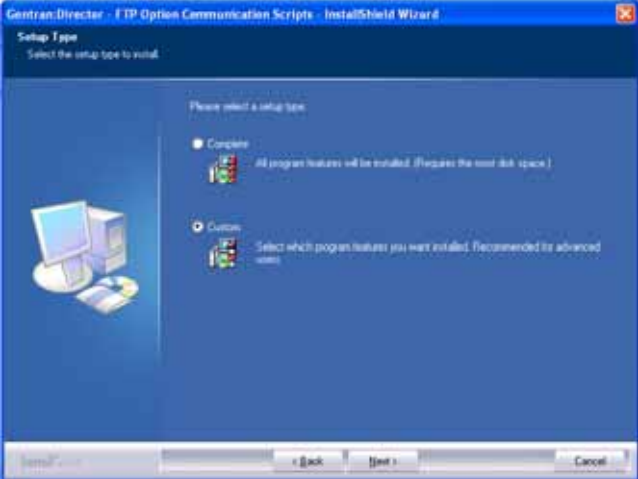
If you downloaded the Communication Scripts from the Internet, start with Step 3 in the procedure below.

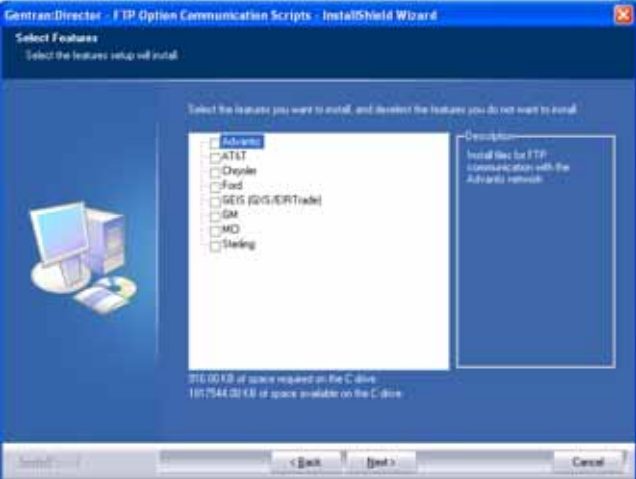
Procedure

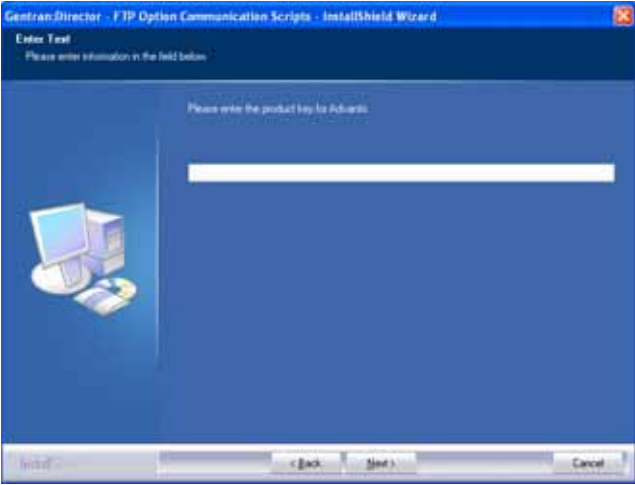
To install Sterling Gentran:Director, complete the following steps:

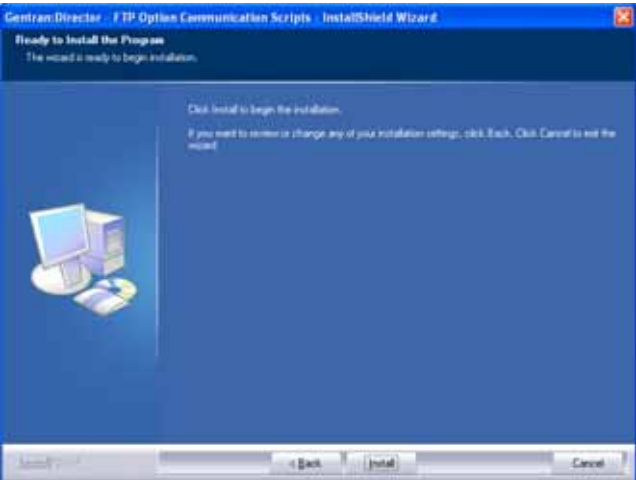
Step	Action
1	<p>Insert the Sterling Gentran:Director FTP Option Communication Scripts CD-ROM into your CD-ROM drive.</p> <p>System response The Sterling Gentran:Director FTP Option Communication Scripts Welcome screen is displayed.</p> <p>Note If the Welcome screen does not appear, go to Step 3.</p>


Step	Action
2	Click Next and go to Step 4. <i>Continued on next page</i>
3	<p>From the Start menu, select Run. In the field, type “<drive>:\setup” and click OK.</p> <p>Note <drive> is the letter associated with your CD-ROM drive. For example, D:\setup.</p> <p>System response Setup prepares the wizard that guides you through the install program and displays the Welcome screen.</p>  <p><i>Continued on next page</i></p>

Step	Action
4	<p>Click Next.</p> <p>System response The Setup Type screen is displayed.</p> 
5	<p>If you need to install the communication scripts for all of the VANs, select Complete. Continue with Step 8. Otherwise, select Custom to install selected communication scripts. Continue with Step 6.</p> <p style="text-align: right;"><i>Continued on next page</i></p>

Step	Action
6	<p>Click Next.</p> <p>System response The Select Features screen is displayed.</p>  <p><i>Continued on next page</i></p>

Step	Action
7	<p>Select your VAN(s) and click Next.</p> <p>System response The Key entry screen for your selected VAN is displayed.</p>  <p><i>Continued on next page</i></p>

Step	Action
8	<p>Enter the Key for your VAN and click Next.</p> <p>System response The Ready to Install the Program screen is displayed.</p>  <p><i>Continued on next page</i></p>

Step	Action
9	<p>Click Next.</p> <p>System response The InstallShield Wizard Complete screen is displayed.</p> 
10	Click Finish .

Setting Up Mailboxes

Introduction

After Sterling Gentran:Director and Sterling Gentran:Director Connection are installed, you can set up your mailbox profiles for Sterling Commerce:Mail and Sterling Gentran:Director using the Mailbox Wizard.

What is Sterling Commerce:Mail?

Sterling Commerce:Mail is an e-mail application through which you can receive e-mail network reports.

Selecting the Mailbox Wizard

The Mailbox Wizard allows you to create a mailbox for Sterling Commerce:Mail and Sterling Gentran:Director. You can run the Mailbox Wizard from any one of the following locations:

- The Sterling Gentran:Director Connection for the Internet setup dialog box that is displayed during product installation (For more information, see page 20.)
- Sterling Connection Manager (For more information, see the application's Online help.)
- Sterling Commerce:Mail (For more information, see the application's Online help.)

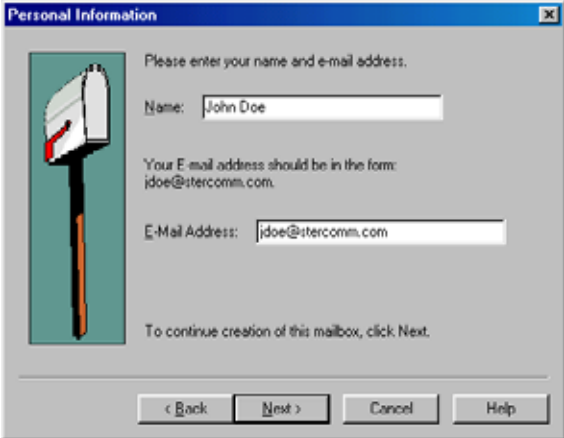
Creating mailbox information

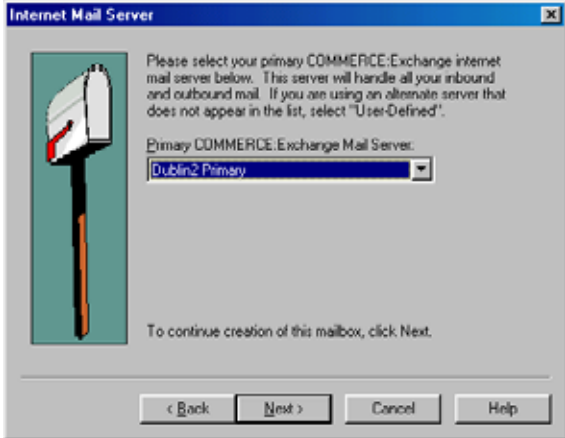
The following procedure describes how to use the Mailbox Wizard to create mailbox information within Sterling Gentran:Director Connection.


Important

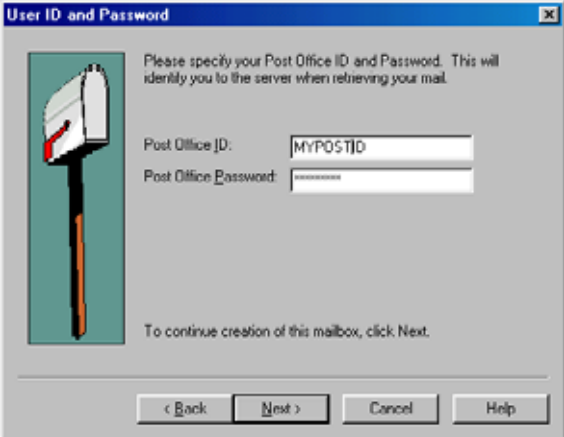
Your mailbox information is assigned by IBM Customer Support and provided to you on a separate form. If you do not have this information, please contact IBM Customer Support for Sterling Gentran products.

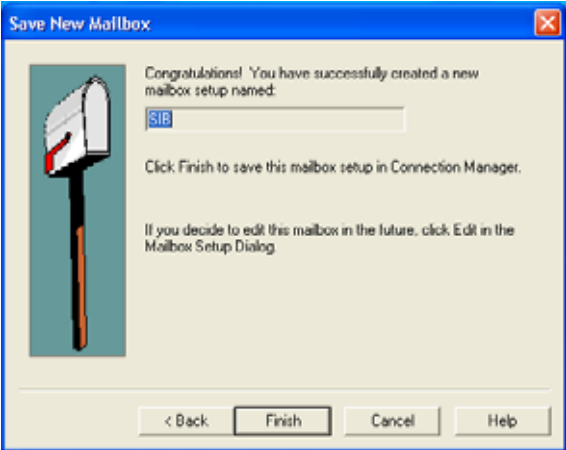
To create mailbox information, complete the following steps:

Step	Action
1	<p>On the Mailbox Wizard Welcome dialog box, type the name of your new mailbox in the provided field and click Next.</p> <p>System response The Personal Information dialog box is displayed.</p>  <p>Note Each mailbox name must be unique and can contain up to 30 alphanumeric characters.</p> <p style="text-align: right;"><i>Continued on next page</i></p>

Step	Action
2	<p>Note Your e-mail address and user name are assigned by IBM. Please see the Password card provided by IBM Customer Support for more information.</p> <p>Do the following:</p> <ul style="list-style-type: none"> ■ Type your user name in the Name field. ■ Type your e-mail address in the E-Mail address field. ■ Click Next. <p>System response The Internet Mail Server dialog box is displayed.</p> 
3	<p>Click the Primary Sterling B2B Collaboration Network Mail Server list box and select one of the following from the list:</p> <ul style="list-style-type: none"> ■ The primary server. This server handles all of your inbound and outbound data. Go to Step 5. ■ User-Defined. This indicates that you want to use an alternate server to send and receive data. Continue with Step 4.

Step	Action
4	<p>Click Next.</p> <p>System response The User-Defined Mail Server dialog box is displayed.</p>  <p><i>Continued on next page</i></p>

Step	Action
5	<p>Type the name of your primary Internet mail server in the Primary Mail Server field. If appropriate, type your secondary Internet mail server name in the Secondary Mail Server field. Click Next.</p> <p>System response The User ID and Password dialog box is displayed.</p>  <p style="text-align: right;"><i>Continued on next page</i></p>

Step	Action
6	<p>Type your post office ID and password in the corresponding fields. Your ID and password work together to identify you to the mail server when it sends and retrieves your messages. Please see the Password card for more information. Click Next.</p> <p>System response The Save New Mailbox dialog box is displayed.</p> 
7	<p>Click Finish.</p> <p>System response Your new mailbox has been created. If you were installing Sterling Gentran:Director, return to the procedure on page 21.</p>

Changing the Default Password

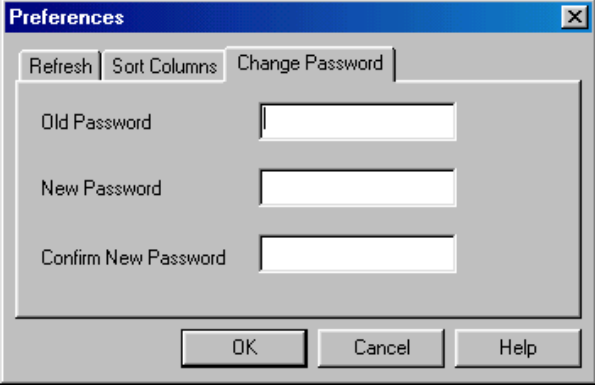
System security is an important ongoing step in controlling who can log on to your system and which functions they can access. Security ensures the integrity of your data by limiting who can make changes to specific areas of the system.

Recommendation

Change the default password for the system administrator login (ADMIN) as soon as possible to minimize security risks.

Complete the following steps to change the default system administrator password:

Step	Description
1	<p>Log on to Sterling Gentran:Director with the default system administrator login:</p> <ul style="list-style-type: none">■ From the Start menu, select Gentran Director\Sterling Gentran:Director.■ Type ADMIN in the User Name box.■ Type security in the Password box.■ Click OK to log on to the system. <p>System response</p> <p>The Sterling Gentran:Director EC Manager window is displayed.</p>
2	<p>From the Tools menu, select Preferences.</p> <p>System response</p> <p>The Preferences dialog is displayed.</p> <p style="text-align: right;"><i>Continued on next page</i></p>

Step	Description
3	<p>Select the Change Password tab, as shown below:</p> 
4	<p>In the Old Password field, type security.</p>
5	<p>In the New Password field, type the new password.</p>
6	<p>In the Confirm New Password field, type the new password again.</p> <p>Note If the Confirm New Password does not match the New Password, you will be prompted to type it again.</p>
7	<p>Once complete, click OK to save the changes.</p> <p>System response The system is updated and the next time you log on to the system using the ADMIN login, you must type the new password.</p>

Adding Users to the System

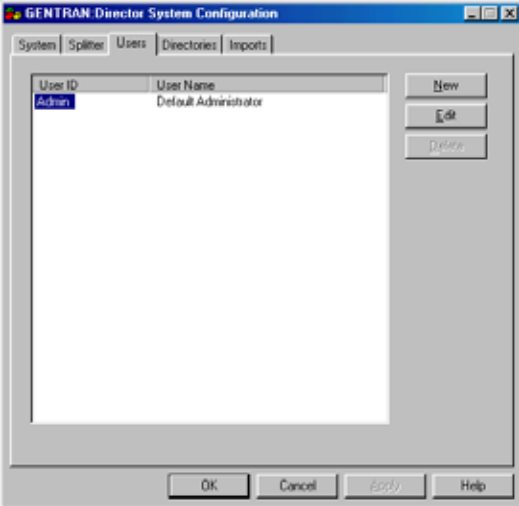
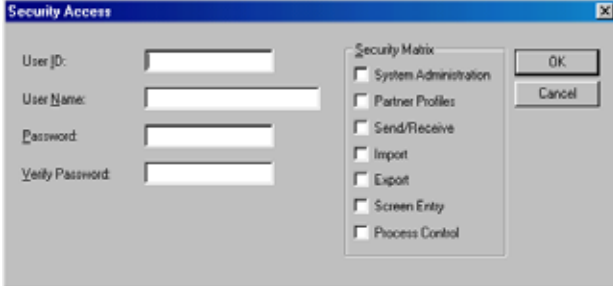
You need to create a Sterling Gentran:Director login for anyone who needs to use the system.

Note

A new user can be set up **only** by a user with System Administration privileges. If you do not have these privileges, have your security administrator complete the setup.

Complete the following steps to add a new user:

Step	Action
1	<p data-bbox="575 666 1153 725">From the Sterling Gentran:Director Main Toolbar, select the System Configuration icon.</p> <p data-bbox="575 760 798 786">System response</p> <p data-bbox="575 795 1153 854">The System Configuration dialog (System tab) is displayed.</p> <p data-bbox="911 871 1166 897"><i>Continued on next page</i></p>

Step	Action
2	<p>Click the Users tab to access user options.</p> <p>System response The Users tab is displayed.</p> 
3	<p>Click New.</p> <p>System response The Security Access dialog is displayed.</p> 
4	<p>In the User ID box, type a unique logon identifier for this user.</p> <p style="text-align: right;"><i>Continued on next page</i></p>

Step	Action
5	In the User Name box, type the name of this user.
6	In the Password box, type the user's password.
7	In the Verify Password box, type the user's password again.
8	In the Security Matrix section, select the areas of the system that the user needs to access.
9	Click OK to exit the Security Access dialog.
10	Click OK to exit the System Configuration program.

Validating your system

The Sterling Gentran:Director online help contains a section that describes the procedures you can use to validate your installation:

Step	Action
1	Log on to Sterling Gentran:Director.
2	Go to the EC Desktop.
3	Click the Help button on the lower right of the screen. Note You can also select Help from the main menu bar or press F1 at any time to display the online help.
4	Click the Contents tab.
5	Double-click Sterling Gentran:Director 5.5.
6	Double-click Getting Started.
7	Double-click Validating and Implementing Sterling Gentran:Director and complete the steps described.

Reinstalling Sterling Gentran:Director

When to perform this procedure

Perform this procedure **only** if you had problems with the installation or validation of your Sterling Gentran:Director release 5.5.

To reinstall Sterling Gentran:Director

To reinstall Sterling Gentran:Director, complete the following steps:

Step	Action
1	<p>Complete the steps for <i>Installing Sterling Gentran:Director on page 16.</i></p> <p>Note This procedure installs products to the folder you installed to previously. IBM suggests that you accept the default folder shown on the Choose Destination Location window.</p> <p>System Response A message is displayed if the installation program detects existing Sterling Gentran:Director components already installed on your PC.</p>
2	<p>To continue with installation and overwrite the Sterling Gentran:Director components that were detected, click Yes.</p> <p>Note To exit the installation program without completing the installation, click No.</p> <p>System Response If the Director Executive is running, a message asking if you want to stop the Director Executive is displayed.</p> <p style="text-align: right;"><i>Continued on next page</i></p>

Step	Action
3	<p data-bbox="622 244 1112 270">Click Yes to continue with the installation.</p> <p data-bbox="622 302 854 331">System Response</p> <p data-bbox="622 348 1224 473">The setup program installs the Sterling Gentran:Director Connection and Sterling Gentran:Director software, and the Mailbox Wizard window is displayed.</p> <p data-bbox="622 505 753 531">Reference</p> <p data-bbox="622 548 1214 609">For information on setting up mailbox profiles, see <i>Setting Up Mailboxes</i> on page 32.</p>

Upgrade for Existing Customers

Installation Roadmap

The following table describes the order of tasks to complete.

Stage	Description	Section
1	Exit Sterling Gentran:Director Connection and Sterling Gentran:Director.	
2	Back up your Sterling Gentran:Director database.	<i>Backing up Your Sterling Gentran:Director System</i> on page 48
3	Stop the Sterling Gentran:Director Executive or the Sterling Gentran:Director Service.	<i>Stopping the Sterling Gentran:Director Executive</i> on page 57
4	Upgrade Sterling Gentran:Director Connection and Sterling Gentran:Director.	<i>Upgrading Sterling Gentran:Director Connection and Sterling Gentran:Director</i> on page 58

Backing up Your Sterling Gentran:Director System

This section provides instructions for backing up your entire Sterling Gentran:Director system. You should back up the database and stop Sterling Gentran:Director Executive before upgrading to Sterling Gentran:Director 5.5.

Before you begin

Before you begin backing up your Sterling Gentran:Director database, complete the following:

Step	Action
1	Create a folder on your hard drive. Name the folder C:\BackupGentran .
2	Create the following subfolders within the BackupGentran folder using the names indicated: <ul style="list-style-type: none">■ Partners■ Templates■ Scripts■ Database■ Documents■ IntlIn■ IntOut■ TransIn■ Bin

When you are done creating the appropriate folders, you are ready to begin backing up Sterling Gentran:Director database.

Backing up Your Partner Profiles

Step	Action
1	Log on to Sterling Gentran:Director and click Partners .
2	Click the name of a partner.
3	Click Export . The Export File Build screen displays.
4	Locate the File Name field and write down the name of the partner profile. The file name should end with .PAR .
5	Click Save . Note The .PAR files are saved to C:\DirectorConnection\Partners
6	Repeat steps 2 – 5 for the remaining partner profiles.
7	When you have exported all of your partner profiles, copy these profiles to C:\BackupGentran\Partners or to a floppy disk. Caution Do not use the move function to perform this task.

Backing up Translation Objects

Step	Action
1	Click View > Translation Objects .
2	Click the name of a translation object. <i>Continued on next page</i>

Step	Action
3	Click View to review the details associated with that translation object.
4	Locate the File Name field and write down the name of the translation object (for example, FIN162022.TPL). Note Some files may have extensions such as .t00, .t01, .t02, etc. When writing down the name, use the extension .TPL for all translation objects.
5	Repeat steps 2 – 4 for the remaining translation objects.
6	Click Close .
7	Click Tools > Configuration > Imports . <i>Continued on next page</i>

Step	Action
8	<p>Write down the File Path and Translation Object Description. You can find the Translation Objects in View > Translation Objects. If you cannot find the description, complete the following:</p> <ol style="list-style-type: none"> a. Click Sort. b. Clear the Hide System Translation Objects checkbox. c. Click OK. <p>This will display all of the system templates. Your system import template should now be listed. Repeat steps 2 – 4 to copy down all translation object file names.</p> <p>Note The .TPL files are saved to C:\DirectorConnection\RegTransobj</p>
9	<p>Copy the files to C:\BackupGentran\Templates or to a floppy disk.</p> <p>Caution Do not use the move function to perform this task.</p>

Backing up Communication Ports, Profiles, and Scripts

To back up your communication ports, profiles, and scripts, gather the following information:

Ports

Step	Action
1	Click Tools > Communications > Ports .
2	Click the name of the port.
3	Click Setup .

Continued on next page

Step	Action
4	Write down the port name and all associated settings.
5	Click Cancel .
6	Repeat steps 2 – 5 for all port profiles.

Profiles

Step	Action
1	Click Tools > Communications > Profiles .
2	Click the name of the profile.
3	Click Setup .
4	Write down the profile name and all associated settings, including: <ul style="list-style-type: none">■ Profile Type■ Modem Number (if applicable)■ Port Profile (if applicable)■ File Copy Name (if applicable)■ IP Address and Socket (if applicable)
5	Click Logon Script (if applicable).
6	Locate the file name on the title bar at the top of the window. Write down the file name using the extension .SCR .
7	Click Cancel .
8	Repeat steps 6 – 7 for Receive Only Script and Send Receive Script. <p style="text-align: right;"><i>Continued on next page</i></p>

Step	Action
9	Click Script Variables .
10	Write down the contents of all the variables that contain information.
11	Click Configure Exchange (if applicable).
12	Write down all settings indicated. Note If you use IBM® Sterling B2B Collaboration Network, you may need to find or request a copy of your User ID and Password for your Sterling Gentran:Director Connection setup.
13	Click Advanced>> .
14	Write down all of the information for: <ul style="list-style-type: none"> ■ Pre-Processor (if applicable) ■ Pre-Post Processor (if applicable)
15	Repeat steps 2 – 14 for all profiles.

Scripts

Step	Action
1	Open the folder labeled C:\DirectorConnection\Bin\Commscr .
2	Verify that the folder contains the same names as those in your notes from Step 6 on page 52.
3	When you have verified folder contents, copy the .SCR files to C:\BackupGentran\Scripts or to a floppy disk. Caution Do not use the move function to perform this task.

Backing up the EDI Data Received from Trading Partner(s)

Step	Action
1	Open the folder labeled C:\DirectorConnection\TransIn .
2	Verify the folder contents.
3	When you have verified folder contents, copy the .EDI files to C:\BackupGentran\TransIn or to a floppy disk. Caution Do not use the move function to perform this task.

Closing Programs

Step	Action
1	Exit Sterling Gentran:Director and all other programs.
2	Stop Sterling Gentran:Director Executive . See Stopping the Sterling Gentran:Director Executive on page 57.

Backing up the Access Database (Optional)

You may want to back up your Access Database to retain document listings in the InDrawer, OutDrawer, and Interchanges.

Step	Action
1	Navigate to C:\DirectorConnection\Database .
2	Copy the Sterling Gentran:Director.mdb files to C:\BackupGentran\Database . Caution Do not use the move function to perform this task.

If you want to view the EDI data for the documents listed in the InDrawer, OutDrawer, and Interchanges, copy the folders and their contents to the corresponding **C:\BackupGentran** folder, as listed below:

- C:\DirectorConnection\Documents
- C:\DirectorConnection\IntIn
- C:\DirectorConnection\IntOut

Note:

For instructions on backing up Process Control (Unattended) and Partner Tables, please contact IBM Customer Support.

**Backing up the Bin
Directory**

Stage	Description
3	Navigate to C:\DirectorConnection\Bin .
4	Copy the contents of this directory to C:\BackupGentran\Bin . Caution Do not use the move function to perform this task.

Stopping the Sterling Gentran:Director Executive

You must stop Sterling Gentran:Director Executive before you can install the Sterling Gentran:Director 5.5 upgrade.

Step	Action
1	Double-click the IBM icon on your system tray.
2	Select Stop Director Executive .
3	Click Yes to stop the application. System Response The Executive icon no longer displays in the Windows toolbar.

Upgrading Sterling Gentran:Director Connection and Sterling Gentran:Director

The installation program upgrades both Sterling Gentran:Director Connection and Sterling Gentran:Director.

Step	Action
1	<p>Insert the Sterling Gentran:Director Connection CD-ROM into your CD-ROM drive.</p> <p>System Response The installation program automatically starts. If it does not automatically start, continue with step 2. Otherwise, continue with step 3.</p>
2	<p>If the installation program does not start, complete the following steps:</p> <ol style="list-style-type: none"> a. From the Start menu, click Run. b. Enter <drive_letter>:\setup.exe <p>where: <drive_letter> is the drive letter for your CD-ROM drive (for example, D:\).</p>
3	<p>To complete the installation, do one of the following:</p> <ul style="list-style-type: none"> ■ If Sterling Gentran:Director 5.4 and Sterling Gentran:Director Connection 6.1.4 are installed on your computer and you want to update both products, click Next until you have completed the installation process. ■ If you do not have Sterling Gentran:Director Connection 6.1.4 installed on your computer and want to install only Sterling Gentran:Director 5.5, on the Select Features screen, de-select Sterling Gentran:Director Connection and click Next until you have completed the installation process.

Restoring Your Sterling Gentran:Director System from Backup

When to perform this procedure

You do not need to perform a restore if the Sterling Gentran:Director Connection 6.2 and Sterling Gentran:Director 5.5 upgrade completes successfully. However, if you experienced problems completing the installation, you may need to restore your system to its original state. Perform the following procedures **only if you experienced problems during installation**.

Prerequisites

Complete the following steps before restoring your database from backup.

Step	Action
1	Close Sterling Gentran:Director and stop Sterling Gentran:Director Executive. See Stopping the Sterling Gentran:Director Executive on page 57.
2	Rename the existing database to a new name (for example, Sterling Gentran:Director.old). However, if you do not want to maintain two copies of a database, you can delete the existing copy and then copy the backup database version to the database folder.
3	Navigate to C:\BackupGentran\ .

Continued on next page

Step	Action
4	<p>Copy the following backup folders and their contents from C:\BackupGentran\ to the associated folders located in the C:\DirectorConnection\ folder:</p> <ul style="list-style-type: none">■ C:\DirectorConnection\Database (one file GentranDirector.mdb)■ C:\DirectorConnection\Documents■ C:\DirectorConnection\IntIn■ C:\DirectorConnection\IntOut <p>Note</p> <p>You do not need to copy the contents of the folders back if you are re-installing the Sterling Gentran:Director software over an existing installation. Only restore folders on a fresh re-install, unless told otherwise by IBM Customer Support.</p>

Re-registering Translation Objects

Step	Action
1	Open Sterling Gentran:Director.
2	Click View > Translation Objects .
3	Click New .
4	Navigate to C:\BackupGentran\Templates .
5	Select all .TPL files and click Open .
6	Click Yes if you are prompted to overwrite any file.

**Rebuilding
Communications Ports
and Profiles**

Ports

If you are reinstalling to the same computer, you can recreate the ports exactly as they were originally. If you are re-installing to a different computer, you will need to determine the port(s) and associated modem(s) to modify the port information accordingly. You may also need to modify the initialization strings if the modem is different.

Step	Action
1	Click Tools > Communications > Ports .
2	Click New .
3	Enter your port name. Note Use a port name from the list of port names you wrote down in the Ports procedure, Step 4 on page 52. This list should also have the settings required to complete step 5 of this procedure.
4	Click OK .
5	Enter the information for all of the settings.
6	Click OK .
7	Repeat steps 2 – 6 for all port entries.
8	When finished, click Close .

Profiles and Scripts

Step	Action
1	Copy all .SCR files from: C:\BackupGentran\Scripts to: C:\DirectorConnection\Bin\Commscr
2	Click Tools > Communications > Profiles.
3	Click New.
4	Enter your profile name. Note Use a profile name from the list of profile names you wrote down in the Profiles procedure, Step 4 on page 52. This list should also have the settings required to complete step 6 of this procedure.
5	Click OK.
6	Enter the information for all of the settings including the Advanced>> section.
7	Click Logon Script (if applicable).
8	Click Import and select the logon script file associated with that profile.
9	Click Open.
10	Click Save.
11	Click Receive Only Script (if applicable). <i>Continued on next page</i>

Step	Action
12	Click Import and select the receive only script file associated with that profile.
13	Click Open .
14	Click Save .
15	Click Send Receive Script (if applicable).
16	Click Import and select the send receive script file associated with that profile.
17	Click Open .
18	Click Save .
19	Click Script Variables (if applicable).
20	Type in the variables associated with that profile.
21	Click OK to save the profile.
22	Repeat steps 3 – 21 for all of the profiles.
23	Click Configure Exchange (if applicable).
24	Fill in all of the settings. Note Use the setting information you wrote down in the Profiles procedure, Step 12 on page 53.

Restoring Partners (if applicable)

If you did not restore your database, complete the following steps to restore your partners:

Step	Action
1	Copy all .PAR files from: C:\BackupGentran\Partners to: C:\DirectorConnection\Partners
2	Click Partners .
3	Click Import . System Response The Import File Select windows displays.
4	Select the partner you want to import and click Open .
5	Click Save .
6	Select the correct communication profile for that partner (if blank).
7	Click Save or press Enter until a window displays indicating the import process is complete.
8	Click OK .
9	Repeat steps 3 – 8 for all partners.

**Reprocessing Old Data
(if applicable)**

Step	Action
1	Click Commands > Process File in Director.
2	Browse to C:\BackupGentran\TransIn and select the file you want to reprocess.
3	Click Open.

For additional information, contact IBM Customer Support.

Upgrading Sterling Gentran:Director and Changing Systems

This section contains instructions for using the Gentran DataBase Computer Name Sync utility to change the computer name stored in the Sterling Gentran:Director database to the new computer name.

When to perform this procedure

Use this section **only** if you are moving your Sterling Gentran:Director system to a new computer as part of your upgrade process.

Prerequisites

You must complete the following tasks before running this utility:

- Install Sterling Gentran:Director 5.5 on the new computer.
- Complete the backup on the old Sterling Gentran:Director system.

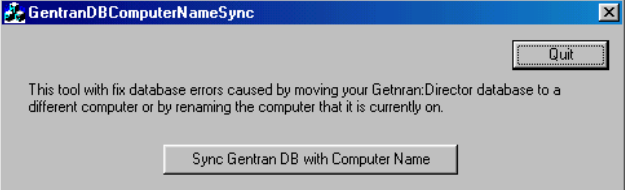
Reference

If you are not familiar with the backup and restore process, see the Knowledge Base on the Support Center Web site for more information. In Knowledge Base, you can use the Quick Search function to locate information about backup and restore procedures. For more information about the Support Center, see **Customer Support** on page 4.

Running the utility

Complete the following steps to run the Gentran DataBase Computer Name Sync utility.

Step	Action
On the new computer (where Sterling Gentran:Director 5.5 is installed):	
1	Navigate to the Sterling Gentran:Director Database folder. If you accepted the default paths during installation, this folder is: C:\DirectorConnection\Database
2	Change the file named GentranDatabase.mdb to NEWGentranDatabase.mdb .
On the old computer (where your existing Sterling Gentran:Director system is located):	
1	Exit Sterling Gentran:Director, if necessary. If the Director Executive is running, stop it (see Stopping the Sterling Gentran:Director Executive on page 57).
2	Navigate to the Sterling Gentran:Director Database folder on the Sterling Gentran:Director system. If you accepted the default paths during installation, this folder is: C:\Program Files\COMMERCE Connection32\Database
3	Copy the file named GentranDatabase.mdb from the <i>old</i> computer to the Sterling Gentran:Director Database folder on the <i>new</i> computer. If you accepted the default paths during installation, this folder is: C:\DirectorConnection\Database <i>Continued on next page</i>

Step	Action
On the new computer (where Sterling Gentran:Director 5.5 is installed):	
1	Put the Sterling Gentran:Director Connection CD-ROM in the CD-ROM drive of the new computer.
2	Navigate to the Support Utilities directory on the CD-ROM and open the folder.
3	In the Support directory, double-click the executable file called GentranDBComputerNameSync.exe . A dialog box is displayed.
4	<p>Click OK.</p> <p>The utility starts and the GentranDBComputerNameSync dialog box is displayed.</p> 
5	<p>Click the Sync Gentran DB with Computer Name button to run the utility.</p> <p>When the utility is finished, the message Done! is displayed.</p>
6	<p>Click Quit to close the message box, then click OK to exit the program.</p> <p style="text-align: right;"><i>Continued on next page</i></p>

Step	Action
7	<p data-bbox="588 256 1193 348">To test that the utility ran successfully, try running a Process Control session that includes a communication session.</p> <ul data-bbox="598 361 1224 614" style="list-style-type: none"><li data-bbox="598 361 1224 475">■ If you do not receive an “Inconsistent computer names” message, the utility successfully updated the computer name in the Sterling Gentran database.<li data-bbox="598 496 1224 614">■ If the “Inconsistent computer names” message is displayed after completing this procedure, call Sterling Gentran:Director Support for assistance. See <i>Customer Support</i> on page 4.

Frequently Asked Questions

This appendix contains answers to some frequently asked questions about installation, tasks in the Pre-installation Checklist, and other topics.

For more questions and answers, see the Sterling Gentran:Director online help and the Support Center Web site located at www.sterlingcommerce.com.

How do I find out what version of Windows is running on the computer?

1. From the Windows Start menu, select **Settings > Control Panel**.
(If you are using a Windows XP system, just select **Control Panel**.)
 2. Double-click **System**.
The System Properties window is displayed. It lists the name, version, and service pack level of the Windows software that is running on the computer.
 3. Click **Cancel** to exit the System Properties window.
-

How do I find out what version of Internet Explorer is running on the computer?

1. From the Windows Start menu, select **Programs > Internet Explorer**.
 2. From the Internet Explorer Help menu, select **About Internet Explorer**.
The Help About is window displayed. It lists the Internet Explorer version and service pack level running on the computer.
 3. Click **OK** to exit the Help About window.
-

How do I find out what version of MDAC is running on the computer?

1. From the Windows Start menu, select **Settings > Control Panel**.
(If you are using a Windows XP system, just select **Control Panel**.)
2. Double-click **Administrative Tools**, then double-click **ODBC**.
3. The ODBC Data Source Administrator window is displayed.
4. Click the **About** tab.
5. Locate the Administrator in the Description field.
6. Find the version listed to the right of Administrator and compare that version to the ones in the following table.

MDAC Versions	ODBC Administrator Version	Do you need to upgrade MDAC?
2.8 (file version 2.80.1022.3) (product version 5.50.4132.500)	3.525.1022.0 (included on the Sterling Gentran:Director 5.5 CD-ROM)	Can be used with Sterling Gentran:Director 5.5. You do not need to upgrade MDAC.
2.7 RTM (2.70.7713.4)	3.520.7713.0	
2.6 SP1 (2.61.7326.6)	3.520.7326.0	
<i>Continued on next page</i>		

MDAC Versions	ODBC Administrator Version	Do you need to upgrade MDAC?
2.6 RTM (2.60.6526.3)	3.520.6526.0	<i>Cannot be used with Sterling Gentran:Director 5.5. Requires upgrade. See <i>Installing Microsoft Data Access Components</i> on page 14 for instructions.</i>
2.5 SP2 (2.52.6019.0)	3.520.6019.0	
2.5 SP1 (2.51.5303.5)	3.520.5303.2	
2.5 RTM (2.50.4403.12)	3.520.4403.2	
2.1 SP2 (2.1.2.4202.3)	3.510.4202.0	
2.1 SP1a (2.1.1.3711.11)	3.510.3711.0	
2.1 RTM (2.10.3513.2)	3.510.3513.0	
2.0 sp2	3.510.3002.23	

7. Click **Cancel** to exit the Data Source Administrator window.

How do I check if ports 110 and 25 are open?

Customers in the U.S.

To check port 110:

1. Make sure you are connected to the Internet.
2. From the Start menu, select **Run**.
3. Type the following in the Open field:

`telnet primary.gts.globalec.com 110`

-
4. Click **OK**.

A telnet session window is displayed. If you see the following message, port 110 is open:

```
+OK Welcome
```

5. Close the window to exit.

To check port 25:

1. Make sure you are connected to the Internet.
2. From the Start menu, select **Run**.
3. Type the following in the Open field:

```
telnet primary.gts.globalec.com 25
```

4. Click **OK**.

A telnet session window is displayed. If you see a message similar to the following, port 25 is open:

```
220 gts.globalec.com COMMERCE:Exchange  
ESMTP/POP3 Server version 1.0 Ready
```

5. Close the window to exit.

Customers in Canada:

To check port 110:

1. Make sure you are connected to the Internet.
2. From the Start menu, select **Run**.
3. Type the following in the Open field:

```
telnet primary.ca.globalec.com 110
```

4. Click **OK**.

A telnet session window is displayed. If a message beginning with "+OK" is displayed, port 110 is open.

5. Close the window to exit.

To check port 25:

1. Make sure you are connected to the Internet.
2. From the Start menu, select **Run**.
3. Type the following in the Open field:
`telnet primary.ca.globalec.com 25`
4. Click **OK**.

A telnet session window is displayed. If you see the following message, then port 25 is open.

```
220 tor1relaypri.ca.globalec.com ESMTP Server  
[current date and time and other information  
may also be displayed here] Ready
```

5. Close the window to exit.
-



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