

Gentran: Director for Windows

Whitepaper

GENTRAN: Director 5.4 Backup and Restore Procedures

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Gentran: Director Backup and Restore Process

Note: The purpose of this solution is to aid in backing up and restoring GENTRAN: Director 5.4. If you use Director 5.3 or lower, please call 1800-GENTRAN to request an upgrade.

If necessary, contact our Remote Installations Department at 1-800-GENTRAN (436-8726) for personalized assistance on an installation for a nominal service fee.

STEP ONE: *Backing up Folders*

The first thing to do is determine what, if any, add-on options are in use with Gentran: Director. In order to do that, go through the following steps:

1. Check if Process Control is being used. In order to check that, do the following:
 - a. Go to Tools>Process Control
 - b. Select the Sessions tab
 - c. If there are sessions listed in the field along the left, then Process Control is in use.
2. Check whether Application Integration is installed. Click on Start>Programs>Commerce Connection and see if “Gentran Director Application Integration” is in the list.
3. Check whether Forms Integration is installed. Click on Start>Programs>Commerce Connection and see if “Gentran Director Forms Integration” is in the list.
4. Check whether you are connecting to another network using a modem. In order to do that, do the following:
 - a. Go to Tools>Communications>Profile.
 - b. Highlight a profile in the list and click Setup.
 - c. Look at the Profile Type field entry. If it is either “Asynchronous” or “Bisynchronous”, then you are connecting to a network using a modem.
 - d. Click Cancel
 - e. Repeat a-d for the other listed communication profiles.
5. See if directories named FTP, GentranFTPClient and Bin\Commscr\GenFTP exist under C:\Program Files\Commerce Connection32. If they do, then the Gentran:Director FTP Option was purchased and installed.

Once the above checks are completed, go to Tools>Configuration in the software. Click the Stop button and answer “yes” to the check prompt. After that, close the Configuration Window and Gentran:Director.

Before you begin to copy files, create a directory named C:\BackupGentran on the Director computer or create a directory named BackupGentran on a Network Drive. Create copies of the following directories, which are all under C:\Program Files\Commerce Connection32, in the BackupGentran directory:

Database
Documents
IntIn
IntOut
RegTransObj
TranRpt

Unattend (Only back up if Process Control is being used)
Maps (Only back up if Application Integration is installed)
Forms (Only back up if Forms Integration is installed)
Bin\Commscr (Only back up if connecting to a network using a modem)
FTP (If the directory exists)
GentranFTPClient (If the directory exists)
Bin\Commscr\GenFTP (If the directory exists)
CMailMsg (If you want to keep old network reports downloaded using Commerce Mail)

Perform the following steps to see if there is a hotfix for Gentran:Director installed. These are taken from article HTG1149 of the Knowledgebase in Support on Demand on Sterling's website:

1. Right click the Windows Start button and select Explore.
2. Maneuver to the C:\Program Files\Commerce Connection32 directory.
3. Right click the Commerce Connection32 directory and select Search.
4. If prompted to select a search type, select "All Files and Folders".
5. Type in *.exe in the "All or part of the file name" field and click the Search button.
6. When the search list comes up, check the Modified Date column and write down the path and file names of any files that have a Modified Date later than April 22, 2005.
7. Click the Back button.
8. Change the entry in the "All or part of the file name" field to *.dll and click the Search Button.
9. When the search list comes up, check the Modified Date column and write down the path and file names of any files that have a Modified Date later than April 22, 2005.
10. Copy each of the files listed in steps 6 and 9 above and place the copy in the BackupGentran directory.

Open Windows Explorer and note the drives showing. Any drive listed that is not a CD, DVD, or floppy disk Drive should be written down so that the drive can be re-mapped if necessary.

Please note that the CommDB folder, which contains the communication profiles, will usually not work as expected even if it is backed up and restored. Due to that, Sterling Commerce recommends that a written backup of all communication profiles be done. When you begin the Restore process, you will need to rebuild all of those communication profiles.

[If you also need to rebuild communications connections with GIS AS2 or with Director FTP Command Line Client, or with third party FTP or AS2 applications, please review the following Whitepaper after you complete the procedures on the following pages.](https://support.sterlingcommerce.com/content/gentran/gentrandirector/whitepapers/ftp_as2_paper.pdf)
https://support.sterlingcommerce.com/content/gentran/gentrandirector/whitepapers/ftp_as2_paper.pdf

STEPS FOR BACKING UP COMMUNICATIONS:

Prior to backing up communications, restart the Director Executive (Start>Programs>Commerce Connection>Director Executive) and re-open Gentran:Director.

Backing up Ports

1. Click on Tools > Communications > Ports
2. Click on one of the listed ports to highlight it.
3. Write down the port name, *taking special note of spelling, capitalization and punctuation.*
4. Click on Setup.
5. Write down ALL the settings.
6. Click Cancel.
7. Repeat steps 2-6 for each of the remaining port profiles.

Backing up Communication Profiles

1. Click on Tools > Communications > Profiles.
2. Highlight one of the profiles in the list
3. Write down the profile name, *taking special note of spelling, capitalization and punctuation.*
4. Click Setup.
5. Write down the entry in the Profile Type field next to the profile name.
6. If the entry in the Profile Type field is Asynchronous, Bisynchronous, or TCP/IP do the following, otherwise skip to step 7.
 - a. Write down the Modem Number. (Asynchronous or Bisynchronous)
 - b. Write down the Port Profile. (Asynchronous or Bisynchronous)
 - c. Write down the IP Address. (TCP/IP only)
 - d. Write down the Socket. (TCP/IP only)
 - e. Click the Logon Script button.
 - f. Write down the filename with the extension of “.scr” that is listed on the title bar at the top of the open window.
 - g. Click Cancel.
 - h. Click the Receive Only Script button.
 - i. Write down the filename with the extension of “.scr” that is listed on the title bar at the top of the open window.
 - j. Click Cancel.
 - k. Click the Send Receive Script button.
 - l. Write down the filename with the extension of “.scr” that is listed on the title bar at the top of the open window.
 - m. Click Cancel.
 - n. Click the Script Variables button.
 - o. Write down the contents of all the variables that are filled in.
 - p. Click the Advanced button.
 - q. Write down the entries, if any, in the Pre-Processor and Pre-Post Processor fields.
 - r. Click Cancel.
 - s. (For Bisynchronous with a CLEO modem only) Copy down the CLEO Configuration information as follows:
 - i. Using Windows Explorer, navigate to C:\Program Files\COMMERCE Connection32\Bin.
 - ii. Find and double-click on the file named CFGBOOK.EXE.
 - iii. Click on each tab and copy down the settings.
 - iv. Click on the STARTUP tab and copy down the Configuration File Name.
 - v. Find this file in the \Bin folder and COPY (do not MOVE) this file to the C:\BackupGentran\Cleo folder.
7. If the entry in the Profile Type field is File Copy, then do the following, otherwise skip to step 8.
 - a. Write down the File Copy Name field entry.
 - b. Click the Advanced Button.

- c. Write down the entries, if any, in the Pre-Processor and Pre-Post Processor fields.
 - d. Click Cancel.
8. If the entry in the Profile Type field is Commerce:Exchange, then do the following:
 - a. Click the Configure Exchange button.
 - b. Write down whether the Connection Type is set to “Modem” or “Local Area Network”.
 - c. If the Connection Type is set to Modem, write down the entry in Connection field.
 - d. Click on the Configure button next to the Mailbox field.
 - e. Click Edit on the Mailbox Setup window.
 - f. Write down the Name and E-mail Address on the Identity tab
 - g. Click on the Network tab.
 - h. Write down the entry in the Inbound Mail Server Primary field.
 - i. Write down the entry in the Post Office ID field.
 - j. The Post Office Password field will display asterisks regardless of what was entered, so there is no need to write down that entry.
 - k. Click Cancel>Close>Cancel.
9. Repeat step 2-8 for each of the remaining communication profiles.
10. If any Asynchronous or Bisynchronous communication profiles were set up above, also do the following:
 - a. Open the Windows Control Panel.
 - b. Click on “Phone and Modem Options”.
 - c. Select the Modems tab.
 - d. Write down the brand and model name of each modem listed as well as the communications port that it is installed on.

STEP TWO: Restoring and Reinstalling Director

Before Starting

- If you need to request that a download of Director 5.4 be made available, call 1-800-GENTRAN (436-8726). Assuming that maintenance fees on the account are paid up, the product will be made available within one business day.
- Locate the Director 5.4 Installation Keys. Those will be in the e-mail if the software was received via download and will be on the packing list if a physical CD was received. If unable to locate the Keys, contact the Sterling Commerce Sales hotline at 800-299-4031.
- If you did not back-up your Commerce Exchange communications settings in STEP ONE, try to locate the Director Communications Password Card originally received during the first installation of the product. If unable to locate the Password Card, contact the Sterling Information Broker Mailbox service at 877-432-4300 for information on obtaining a new one.
- Important Notice: Do not install Director 5.4 on computers that have Windows 95, Windows 98, Windows 2003, or Windows VISTA as the operating system as those are not supported operating systems.

Insert installation CD and follow the installation prompts. When prompted for Installation Keys, leave blank any field for which you do not have a corresponding installation key. When you get to the prompt that asks if you want to run the Mailbox Wizard, select yes if you have the Password Card or the information it contains. If you do not have that information, skip the Wizard and review the Communications Section in the latter portion of this document.

Replacing Files

1. On the new PC, rename the GentransDirector.mdb file found in the C:\ProgramFiles\CommerceConnection32\Database directory to GentransDirector.old.
2. Copy the GentransDirector.mdb file from C:\BackupGentrans\Database to the C:\Program Files\CommerceConnection32\Database directory on the new PC.
3. Other than the Database directory, copy all the files and folders that were backed up to BackupGentrans directory to the SAME location on the new computer, replacing the existing files or folders. For example, copy the IntOut directory from BackupGentrans to C:\Program Files\Commerce Connection32 directory, overwriting the existing (blank) IntOut directory.
4. After all of the backup files and folders has been placed on the new computer, browse your GENTRAN:Director 5.4 CD or downloaded file and open the Support folder.
5. Run the GentransDBComputerNameSync.exe program.

6. Click Sync Gentrans DB with Computer Name.
7. Once you receive the 'Done' message, click OK and then Quit.
8. Close all programs and reboot the new PC.

Rebuilding Communications Ports and Profiles

PORTS: This must be completed even if you do not use a modem to send/receive EDI.

- a. If an Asynchronous or Bisynchronous communication profile was set up on the old computer, do the following, otherwise skip this step.
 1. Open the Windows Control Panel.
 2. Click on Phone and Modem Options.
 3. Select the Modems tab.
 4. If no modems are installed, install the necessary modem(s). Whenever possible, install modems on the same port on the new computer as they occupied on the old computer. Please note that support for Gentrans:Director does not include support for the installation of modems.
 5. If modems are already installed, note whether they are of the same make and model as on the old machine and whether or not they are on the same communications ports.
 6. Back in Gentrans:Director, click on Tools > Communications > Ports.
 7. Click on New.
 8. Refer to your notes for the port name and type it in EXACTLY as it was written down.
 9. Click on OK.
 10. Fill in all the settings as per the notes, with the following exceptions:
 - a. If the modem on the new computer is not on the same communication port as the modem on the old computer, change the entry for the Port field.
 - b. If the make and model of the modem on the new computer is not the same as the make and model of the modem on the old computer, leave the Initialization field blank.
 11. Click OK.
 12. Repeat steps 7-11 to recreate any other ports.

IF RECREATING AN ASYNCHRONOUS, BISYNCHRONOUS OR TCP/IP COMMUNICATIONS PROFILE:

1. Click on Tools > Communications > Profiles.
2. Click on New.

3. Refer to your notes for the profile name and type it in. It is very important that capitalization not change when inputting the name.
4. Click on OK.
5. Click on Advanced.
6. Fill in ALL the settings from your notes.
7. If the profile you are recreating is an asynchronous, a bisynchronous or a TCP/IP profile, do the following. Otherwise skip to step 8.
 - a. Click on Logon Script.
 - b. Click on Import and select the logon script file for that profile.
 - c. Click on Open.
 - d. Click on Save.
 - e. Click on Receive Only Script.
 - f. Click on Import and select the receive only script file for that profile.
 - g. Click on Open.
 - h. Click on Save.
 - i. Click on Send Receive Script.
 - j. Click on Import and select the send receive script file for that profile.
 - k. Click on Open.
 - l. Click on Save.
 - m. Click on Script Variables.
 - n. Type in the variables for that profile.
 - o. Click on OK to save the profile.
8. If the profile you are recreating is a File Copy profile, do the following. Otherwise, skip to step 9.
 - a. Click OK to save the profile.
9. If the profile that you are recreating is a Commerce:Exchange profile, do the following. (Note: If the communication profile on the old computer was set to Modem in the Connection Type, you must install the software from your Internet Service Provider (ISP) on the new computer prior to doing this.)
 - a. Click the Configure Exchange button.
 - b. Fill in the fields on the Commerce:Exchange Configuration window per your notes.
 - c. Click the Configure button for the mailbox field.
 - d. Click the New button.
 - e. Type in the mailbox name as it was on the old computer.
 - f. Click Next and continue through the Mailbox Setup Wizard.
 - g. If, and only if, the name of the Primary Inbound Mail Server in the notes contained the number 2375, do the following:
 - i. On the Mailbox Setup window, highlight the mailbox you just created.
 - ii. Click Edit.
 - iii. Select the Network tab.
 - iv. Click the Advanced button.
 - v. Change the entry in the SMTP Port field from 25 to 2375.
 - vi. Click OK > OK.
 - h. Click Close > OK > OK.

10. Repeat steps 2-9 for each of the other profiles that you need to recreate.

Bisynchronous communication profile users note: You will need to (re)install the CLEO software directly into the \Bin folder on the new install (NOT to a sub-folder called "\3780plus"), and put the configuration file from your C:\BackupGentran\Cleo folder into the \Bin folder as well. Remember to restore settings you wrote down in section III., Profiles, step 17 for the CFGBOOK.EXE settings. For more information on Bisync setup please contact CLEO.

Rebuilding the Process Control Events for the Sessions

1. In Gentran, go to Tools>Process Control.
2. Click on the Events tab.
3. Click New.
4. Type in a description for the Event.
5. Select a session to use. The sessions are stored in the Unattend folder, which would have been copied from the old PC.
6. Under the Timed Event fields, select or enter the options that apply to your Event. If you were using Process Control on the old PC, it is suggested that you refer to the settings that were on the old PC.

As noted above in the Backup section of this paper, if you do FTP communications using the Director FTP Option or third party software, or if you do AS2 communications using Sterling Commerce's Gentran Integration Suite (GIS) software or third party software, please see the below Whitepaper on Sterling's Support on Demand website for instructions on how to set up the integration between that software and Gentran:Director.

https://support.sterlingcommerce.com/content/gentran/gentrandirector/whitepapers/ftp_as2_paper.pdf

Congratulations! At this point, you have completed the backup and reinstallation procedures.

Please see below for some general suggestions and some notes on what may occur if the above procedures are not followed correctly.

General Suggestions:

Sterling Commerce Customer Support strongly suggests that you do the following:

Template Backups:

Any time there is a change in the templates (translation objects) that you use, backup the changed template(s). If you buy templates from Sterling's Library on the Web, or contract with Sterling to have a special template created for you, or buy templates from a third party, then every time you receive a new template, back the file up to a location that is not on the same computer as Gentran:Director. Even if you receive a revised template that does not include a change in document (transaction) type or version, back it up. It would also be a good idea to keep a running text file in the backup location that explains what templates have changed, when they changed, and why they changed, as well as the time and reason for the acquisition of new templates. Similarly, if you do your own mapping using one or more of TDF Generator, Application Integration, or Forms Integration, backup both the map and the template after you are satisfied that the template works the way you want it to. Having all your templates backed up and cataloged will greatly reduce the time required to get back up and running if the computer that Gentran:Director is loaded on ever crashes.

Partner Profile Backups:

Any time there is a change to a partner profile, or a new partner profile is added, once you are certain that the changes or new profile work as expected, export the partner profile and then backup the exported partner profile to a location that is not on the same computer as Gentran:Director. Changes to a partner profile include adding new relationships, changing the production/test status of an existing relationship, changing the settings in the interchange or group envelope of an outbound relationship, etc. In order to export a partner profile, open the Partner Editor, highlight the partner, click the Export button, note the entry in the File Name field, and then click the Save button. The file to backup will be located in the C:\Program Files\Commerce Connection32\Partners directory. (Once a partner profile has been exported one time, then every time it is exported again after that, you will see a message that says "C: :\Program Files\Commerce Connection32\Partners\XXXXX.par already exists. Do you want to replace it?" In that message, the XXXXX will vary each time. Click on Yes at that prompt when it appears. Having the current version of all your partner profiles backed up will greatly reduce the time required to get back up and running if computer that Gentran:Director is loaded on ever crashes.

Spot Backups:

Most of the content of the Commerce Connection32 directory will not change very often, so a properly taken backup will cover it. There are several directories, however, whose content will change on a daily basis. Sterling Commerce recommends that a business decision be made as to how often backups need to be done. According to that decision,

stop the Director Executive and close the software and backup the below directories in order to have a spot backup for a given date.

Database
Documents
IntIn
IntOut
TranRpt