IBM Sterling Gentran:Server for Microsoft Windows

Getting Started Guide
Version 5.3

IBM

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This edition applies to the 5.3 Version of IBM® Sterling Gentran:Server® for Microsoft Windows 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.

About this Guide

Contents

This guide contains important information to help get you started making the most of IBM® Sterling Gentran:Server® for Microsoft Windows. This guide contains the following topics:

Installing documentation

To install the Sterling Gentran:Server for Microsoft Windows products and optional components, you will need to print all of your installation instructions.

If you are installing from CD-ROM, insert the documentation CD-ROM into your CD-ROM drive. A welcome screen will display automatically. From that screen, you can either install the documentation or open individual manuals (in Acrobat Reader).

If you are downloading from the Internet, you will download the documentation in step 9 of the next procedure.

Documentation Roadmap

Version 5.3 Documentation

The Sterling Gentran:Server for Microsoft Windows documentation is designed to guide you through your day-to-day use of the system. The following are some of the documents that are available for Sterling Gentran:Server for Microsoft Windows:

◗ *IBM® Sterling Gentran:Server® for Microsoft Windows Distributed System Installation Guide* or *IBM® Sterling Gentran:Server® for Microsoft Windows Single Workstation Installation Guide*—This guide contains the tasks you must complete to install Sterling Gentran:Server for Microsoft Windows.

Recommendation
Refer to the Installation Guide first.

◗ *IBM® Sterling Gentran:Server® for Microsoft Windows Administration Guide*—This guide contains the tasks you must complete to set up and configure your system after you have installed the Sterling Gentran:Server software.

◗ *IBM® Sterling Gentran:Server® for Microsoft Windows User Guide*—This guide contains the tasks for operating Sterling Gentran:Server on a daily basis.

◗ *IBM® Sterling Gentran:Server® for Microsoft Windows Application Integration User Guide*—This guide contains the tasks necessary for creating maps to translate your data.

◗ *IBM® Sterling Gentran:Server® for Microsoft Windows Forms Integration User Guide*—This guide contains the tasks necessary for creating screen-entry and print forms.

◗ *IBM® Sterling Gentran:Server® for Microsoft Windows Communications User Guide*—This guide contains the tasks for configuring and administering communications for Sterling Gentran:Server.

◗ Tutorials—These guides provide step-by-step examples describing how to create maps and forms.

Downloading Sterling Gentran:Server from the Internet

Introduction This section contains procedures for downloading the Sterling Gentran:Server for Microsoft Windows 5.3 release, including documentation.

Downloading the Application File To download the archive file:

Step	Action
1	In the e-mail message you received from IBM, click the link to the Internet Download Area.
2	In the Security Alert dialog box, click **Yes**.
3	On the Login page, type the following information: ◗ Sterling order number ◗ Company name ◗ Customer ID
4	Click **Login**, and the system displays the Download Area.
5	Locate **Sterling Gentran:Server for Microsoft Windows, version 5.3** and click **Download**.
6	In the File Download dialog box, click **Save**.
7	When the Save As dialog box opens, save the archive file to the C:\ drive. **Note** If Internet Explorer adds a number in brackets to the name of the downloaded file (for example, gsw53[1]_core_cd.zip), rename the file on the Microsoft Windows system before you transfer it to the system where it will be installed.
8	Right-click the archive file icon to extract the file to an empty directory. **Note** Several folders and files are extracted.

(Contd) Step	Action
9	To install the product documentation set, complete the following steps: ◗ From the Doc_cd download section, open **install.htm** using Internet Explorer. ◗ Click **Start Installer for Microsoft Windows**. **Note** If you do not have Adobe Acrobat currently installed, you can download it from the Adobe website.
10	After reading the rest of this guide, continue with the *IBM® Sterling Gentran:Server® for Microsoft Windows Single Workstation Installation Guide* or the *IBM® Sterling Gentran:Server® for Microsoft Windows Distributed System Installation Guide* to complete the core product installation. When you are ready to start the installation of the core product, run **setup.exe** from the folder created in step 8, above. **Note** Other Sterling Gentran:Server for Microsoft Windows components (for example, Options Pack components and product extensions) may also be installed from the Internet. See the appropriate *IBM® Sterling Gentran:Server® for Microsoft Windows Installation Card* for the Sterling Gentran:Server component for details about how to download the component software from the Internet. The installation cards are part of the product documentation that you installed in step 9, above.

Accessing the ReadMe File from the CD-ROM

Introduction   The Sterling Gentran:Server for Microsoft Windows Installation package contains a ReadMe file describing any changes and instructions that occurred after the documentation was finalized.

If you did not receive a CD-ROM, look for the ReadMe file in the folder you created in **Step 8** on page 3.

Recommendation
You should consult this file before you begin installing the Sterling Gentran:Server software.

The Sterling Gentran:Server for Microsoft Windows Installation CD-ROM starts automatically when you insert it into your CD-ROM drive. To access the ReadMe file, select the View "ReadMe" option from the splash screen that the Autorun program displays.

Procedure   If you choose not to access the ReadMe file prior to installation, use this procedure to retrieve the ReadMe file from the Installation CD-ROM after installation.

Step	Action
1	Insert the Installation CD-ROM into your CD-ROM drive.
2	Navigate to your CD-ROM drive.
3	Double-click the **Readme.htm** file in the root of the Installation CD-ROM.

Changing the Local Security Setting

Introduction   Before installing Sterling Gentran:Server for Microsoft Windows, you may need to change the local security setting; otherwise, services may not restart after the installation is complete.

Procedure   To change the local security setting:

Step	Action
1	From the **Start** menu, select **Settings > Control Panel**.
2	Double-click **Administrative Tools**.
3	Double-click **Local Security Policy**.
4	Double-click **Act as part of the operating system**.
5	Click **Add User or Group**.
6	Enter a user ID in **Object names to select**. **Note** If you are planning to run unattended sessions, also add a user ID to **Log on as batch job properties**.
7	Click **OK**.
8	Click **OK** on the Local Security Setting screen.

Hardware Requirements

Introduction   This section describes our recommendations for the configuration of a Sterling Gentran:Server system. If you follow the recommendations outlined in this section, it is easier for you to install, maintain, administer, and support the Sterling Gentran:Server system.

Distributed Environments   In a distributed environment, the recommended hardware and software configuration depends on which Sterling Gentran:Server system components are run on the machine. Production implementations should implement the recommended specifications to achieve maximum system performance.

Note
Significant performance improvements can be accomplished with additional RAM (memory). Processing a large number of documents may necessitate an increase from these recommendations.

Recommended Hardware   The following are our hardware recommendations. Production implementations should implement the recommended specifications to achieve maximum system performance. These recommendations assume that only the operating system, the database management system, and Sterling Gentran:Server are installed on your machine. Any additional software may require additional hardware.

Hardware	Recommended
Processor	Pentium 4 Processor or higher

We strongly recommend that you purchase server class hardware instead of high-end desktop systems. This type of hardware is significantly more reliable and offers greater performance than desktop units. Implementations requiring concurrent translation or communications should consider multi-processor servers. |

(Contd) Hardware	Recommended

Disk Space Available	The following calculation should yield an accurate approximation of the disk space required to implement Sterling Gentran:Server. We suggest that you implement some level of RAID.
	(Total Inbound Data times Data Retention Period) plus (Total Outbound Data times Data Retention Period) times 6 plus 500 MB (system overhead)
	
	For example: You process an average of 10 MB of inbound data and 20 MB of outbound data per day. You want to retain that data on the system for 14 days.
	
	The calculation is:
	
	Inbound – 10 MB X 14 days = 140 MB
	Outbound – 20 MB X 14 days = 280 MB
	                                                                      ------ 	
	                                                                      420 MB
	                                                                      X 6
	                                                                      ------ 	
	                                                                      2620 MB
	                                                                      +500 MB
	                                                                      ------ 	
	                                                                      3120 MB or 3.2 GB

Memory (RAM)	The memory required can be approximated by the amount of data to be translated. This estimate is the amount of input data plus the amount of output data that is processed in a day. This assumes that the data to be processed is distributed throughout the day. If the data must be processed in less than a 4 hour window, use the next higher tier for required memory. **IF you have this amount of output data per day...** / **THEN you need at least this much RAM...** Less than 25 MB data / 64 MB RAM 25 MB – 50 MB data / 128 MB RAM 50 MB – 100 MB data / 256 MB RAM > 100 MB data / consider upgrading to single server or distributed version of Sterling Gentran:Server

(Contd) Hardware	Recommended
CD-ROM	Yes
Mouse	Yes (or other tracking device)
Monitor	SVGA 256-color monitor (recommend 17" 1024 x 768 resolution for Application and Forms Integration) **Note** Your monitor must support 800 x 600 pixel resolution.
Communications	Modem to support external communications
Clustered System Requirements *(for distributed environments only)*	◗ A pair of Microsoft-verified SCSI adapters ◗ A SCSI quorum drive ◗ Two PCs (preferably identical)

Supported Operating Systems

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

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

Note
This information is intended to be used as a starting point for determining which versions of Sterling Gentran:Server and operating system are compatible. Refer to the IBM Sterling Customer Support website for the most current information on supported software:

(http://customer.sterlingcommerce.com)

Operating Systems   This table identifies the operating systems supported for use with Sterling Gentran:Server for Microsoft Windows.

Sterling Gentran:Server System Component	Operating System	Service Pack
Single workstation license (non-distributed environment)	Microsoft Windows 2000 Professional	SP4
	Microsoft Windows 2000 Server	SP4
	Microsoft Windows 2000 Advanced Server	SP4
	Microsoft Windows Server 2003, Standard Edition	SP2
	Microsoft Windows Server 2003, Enterprise Edition	SP2
	Microsoft Windows XP Professional	SP2
	Microsoft Windows Vista	

Sterling Gentran:Server System Component	Operating System	Service Pack
User Interface Client (distributed environment or single workstation)	Microsoft Windows XP Professional	SP2
	Microsoft Windows 2000 Professional	SP4
	Microsoft Windows 2003 Professional	SP2
	Microsoft Windows Vista	
Primary System Controller/ Process Controllers/ Communication Controllers (distributed environment)	Microsoft Windows 2000 Server	SP4
	Microsoft Windows 2000 Advanced Server	SP4
	Microsoft Windows Server 2003, Enterprise Edition	SP2
	Microsoft Windows Server 2003, Standard Edition	SP2
Node(s) in a Clustered Environment	Microsoft Windows 2000 Advanced Server	SP4
	Microsoft Windows Server 2003, Enterprise Edition	SP2

Operating Systems in a Distributed Environment

In a non-clustered environment, you must have Microsoft Windows 2003 Enterprise Edition, Microsoft Windows 2003 Standard Edition, Microsoft Windows 2000 Server, Microsoft Windows 2000 Professional, or Microsoft Windows XP Professional (for user interface clients *only*) installed on each machine that is used in the Sterling Gentran:Server system. Depending on the type of system component that is installed on each machine, the operating system requirements vary.

In a clustered environment you must have Microsoft Windows 2000 Advanced Server or Microsoft Windows Server 2003 Enterprise Edition on all machines in the system.

You must have Microsoft Windows 2000 Server, Microsoft Windows 2000 Advanced Server, Microsoft Windows 2003 Enterprise Edition, or Microsoft Windows 2003 Standard Edition installed on your Sterling Gentran:Server primary system controller in a distributed system, because this allows you to administrate the domain.

Using VMWare Virtual Server Environment

With Sterling Gentran:Server for Microsoft Windows release 5.3, IBM will offer standard support of Sterling Gentran:Server for Microsoft Windows on supported versions of Microsoft Windows in a VMWare virtual server environment.

Customers who encounter problems that cannot be reproduced in a non-virtual Microsoft Windows environment will be referred to VMWare for appropriate support. IBM support for Sterling Gentran:Server for Microsoft Windows on Microsoft Windows extends to VMWare virtualization products that are supported by VMWare/EMC as of August 1, 2008.

Supported Databases

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

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

Notes

◗ This information is intended to be used as a starting point for determining which versions of Sterling Gentran:Server and databases are compatible. Refer to the Customer Support website for the most current information on supported software: www.sterlingcommerce.com/Customer

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

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

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

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

Recommendation
Check with your vendor for available updates. We strongly recommend that you apply any updates to a test environment prior to upgrading your production system.

Notes

◗ Using Microsoft Windows 2000 service pack updates will affect the Microsoft for Oracle ODBC driver version.

◗ Using Microsoft Windows 2000 or SQL Server service pack updates will affect the SQL Server driver version and update the version of MDAC installed on your system.

SQL Server with Microsoft Windows

IF you have SQL Server database version...	Apply this SQL Service Pack...	Apply this ODBC Patch...	Supported MDAC
SQL Server 2000	SP4 (Please check with your vendor for recommended updates.)	N/A Controlled by MDAC version.	MDAC 2.7 or 2.8 (applied by the service pack)
SQL Server 2005	SP2 (Please check with your vendor for recommended updates.)	N/A Controlled by MDAC version and SQL Native Client.	MDAC 9.0 (applied by OS service pack)

Oracle with Microsoft Windows

IF you have Oracle database version...	Apply this Oracle Patch Set...	Apply this ODBC Patch...	Supported MDAC
• Oracle 10g Release 2 • Oracle 9i Release 2	None required. (Please check with your vendor for recommended updates.)	None required. (Please check with your vendor for recommended updates.)	MDAC 2.7 or 2.8
• Oracle 11g	None required. (Please check with your vendor for recommended updates.)	None required. (Please check with your vendor for recommended updates.)	MDAC 2.8

Obtaining Additional Files

ODBC Administrator
The ODBC Administrator is found within the Microsoft Data Access Components. You can download these from the Microsoft website:

www.microsoft.com/data/ (Follow the links to the download site.)

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

www.oracle.com

Clustering and Resident/Non-Resident Databases

Overview The following table contains the operating system and database configurations that are supported for Sterling Gentran:Server for Microsoft Windows version 5.3. This table also describes the configurations in which resident or non-resident databases are supported.

	Operating System	**Database**	**Sterling Gentran:Server in a Clustered System**	**Sterling Gentran:Server in a Non-Clustered System**
Distributed System	Microsoft Windows 2000 Advanced Server	• SQL Server • Oracle	Supported with resident and non-resident databases	Supported with resident and non-resident databases
	Microsoft Windows Server 2003, Enterprise Edition	• SQL Server • Oracle	Supported with resident and non-resident databases	Supported with resident and non-resident databases
Single Workstation	Microsoft Windows XP Professional	SQL Server	Not supported	Supported with resident and non-resident databases
	Microsoft Windows Vista	SQL Server	Not supported	Supported with resident and non-resident databases
	Microsoft Windows 2000 Professional	SQL Server	Not supported	Supported with resident and non-resident databases
	Microsoft Windows 2000 Professional	Oracle	Not supported	Not supported

Notes

◗ See *Oracle with Microsoft Windows* on page 1 - 14 for supported versions of the Oracle database.

◗ Microsoft only supports clustering on Microsoft Windows 2000 Advanced Servers and Microsoft Windows 2003 Enterprise Edition. IBM supports clustering with a distributed license.

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

Pre-installation Checklists

Introduction   The following pre-installation checklists ensure that you have the necessary environmental components prior to installing Sterling Gentran:Server for Microsoft Windows.

Reference
Refer to the respective vendor Web sites for instructions on how to download components.

Controller Pre-installation Checklist

You must have the following environmental components installed on each controller (primary system controller and all secondary controllers) prior to installing Sterling Gentran:Server.

◗ Microsoft Windows 2000 Professional SP4, Microsoft Windows 2000 Server SP4, Microsoft Windows 2000 Advanced Server SP4, Microsoft Windows 2003 Enterprise Edition SP2, Microsoft Windows 2003 Standard Edition SP2, Microsoft Windows XP Professional SP2, or Microsoft Windows Vista

◗ Microsoft Data Access Components (MDAC) ODBC

Reference
See *Database Management Systems* on page 1 - 13 for the supported MDAC versions.

Note
We recommend that you use the same version of MDAC on all your controller and user interface client machines in the Sterling Gentran:Server for Microsoft Windows system.

◗ Internet Explorer 6.0 (This is necessary to use the Data Definition Format (DDF) and some COM components.)

◗ If using SQL, Service Pack 4 for SQL Server 2000 or Service Pack 2 for SQL Server 2005

◗ If using ORACLE, appropriate Patch Sets from *Oracle with Microsoft Windows* on page 1 - 14

Procedures for Microsoft Outlook Users (Controller)

If you are using Microsoft Outlook 2000, Microsoft Outlook 2002, or Microsoft Outlook 2003 to configure e-mail audit notifications, you must perform the following prior to installing Sterling Gentran:Server:

◗ Install and configure a MAPI-compliant server, such as Microsoft Exchange, on a machine in the domain in which you run Sterling Gentran:Server.

◗ Configure a MAPI profile on the MAPI-compliant server.

◗ Install and configure Microsoft Outlook 98, Microsoft Outlook 2000, Microsoft Outlook 2002, or Microsoft Outlook 2003 on your primary system controller using a Microsoft Exchange Server profile.

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

Warning
The use of any other configuration of Microsoft Outlook will result in messages not being sent automatically unless the Microsoft Outlook client is launched.

Note
If the e-mail back-end is Microsoft Exchange, the Sterling Gentran:Server Mailbox service must use a domain account that has been granted access to a Microsoft Exchange mailbox. This allows the service to log on directly to the mailbox without being prompted for a password.

Note
Consult your Microsoft Outlook administrator if you are having issues with your MAPI-compliant server.

Recommendations

◗ Install Sterling Gentran:Server Sterling Gentran:Server-dedicated member server or stand-alone server—*not* a primary domain controller.

◗ Install Sterling Gentran:Server and your database management system (SQL or ORACLE) on a drive that is *not* your system drive.

◗ Prior to upgrading Sterling Gentran:Server, back up your database tables and your Sterling Gentran:Server data store.

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

User Interface Client Pre-installation Checklist

You must have the following environmental components installed on each user interface client prior to installing Sterling Gentran:Server for Microsoft Windows.

◗ Microsoft Windows 2000 Professional SP4, Microsoft Windows 2003 Professional SP2, Microsoft Windows XP Professional SP2, or Microsoft Windows Vista

◗ Microsoft Data Access Components (MDAC) ODBC

Reference
See *Database Management Systems* on page 1 - 13 for the supported MDAC versions.

Note
We recommend that you use the same version of MDAC on all your controller and user interface client machines in the Sterling Gentran:Server system.

◗ Internet Explorer 6.0
(This is necessary to use the Data Definition Format (DDF) and some COM components.)

Clustered System Pre-installation Checklist

You must have the following environmental components installed on each node in your clustered environment prior to installing Sterling Gentran:Server:

◗ Microsoft Data Access Components (MDAC) ODBC

Reference
See *Database Management Systems* on page 1 - 13 for the supported MDAC versions.

Note
We recommend that you use the same version of MDAC on all your machines in the Sterling Gentran:Server for Microsoft Windows system.

◗ Internet Explorer 6.0 (this is necessary to use the Data Definition Format (DDF) and some COM components)

◗ Microsoft Windows 2000 Server SP4, or Microsoft Windows 2003 Standard Edition SP2

◗ If using SQL, Service Pack 4 for SQL Server 2000 or Service Pack 2 for SQL Server 2005

◗ If using ORACLE, appropriate Patch Sets from the *Supported Software Lists* in the previous section

Procedures for Microsoft Outlook Users (Clustered)

If you are using Microsoft Outlook 2000, Microsoft Outlook 2002, or Microsoft Outlook 2003 to configure e-mail audit notifications, you must perform the following prior to installing Sterling Gentran:Server:

◗ Install and configure a MAPI-compliant server, such as Microsoft Exchange, on a machine in the domain in which you will run Sterling Gentran:Server.

◗ Configure a MAPI profile on the MAPI-compliant server.

◗ Install and configure Microsoft Outlook 2000, Microsoft Outlook 2002, or Microsoft Outlook 2003 on your primary system controller using a Microsoft Exchange Server profile.

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

Warning
The use of any other configuration of Microsoft Outlook will result in messages not being sent automatically unless the Microsoft Outlook client is launched.

Note
If the e-mail back-end is Microsoft Exchange, the Sterling Gentran:Server Mailbox service must use a domain account that has been granted access to a Microsoft Exchange mailbox. This allows the service to log on directly to the mailbox without being prompted for a password.

Note
Consult your Microsoft Outlook administrator if you are having issues with your MAPI-compliant server.

Recommendation
Prior to upgrading Sterling Gentran:Server, back up your database tables and your Sterling Gentran:Server data store.

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

Contacting Product Support

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 IBM® 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 this site at: Sterling Customer Center. (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)

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