

Sterling B2B Integrator



# Setup Checklist - Implementation

*Version 5.2*



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**Note**

Before using this information and the product it supports, read the information in "Notices" on page 7.

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# Setup Checklist - Sterling B2B Integrator Implementation

Use this checklist to assist you when planning your Sterling B2B Integrator implementation.

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## Sterling B2B Integrator Terminology

The following terms and definitions will assist you in understanding the concepts that are discussed in this document:

- Cluster – Two or more connected copies of Sterling B2B Integrator that share a database.
- Node – One copy of Sterling B2B Integrator in a cluster.
- Perimeter Server – Communications management software that can be installed in a DMZ and manages communication flows between a perimeter network and Sterling B2B Integrator TCP-based transport adapters.
- Perimeter Services – Sterling B2B Integrator subsystem supporting multihoming and secure perimeter network traversing for Sterling B2B Integrator B2B communications protocols.

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## Implementation Checklist

Setting up Sterling B2B Integrator is a multi-step process which should be completed in the order described. The following is a checklist for each step in the process. The checklist provides an overview of the entire process. You may want to make a copy of this checklist and use it to record any notes you may have:

Step	Task	Notes
1	Install and configure Sterling B2B Integrator.	
2	Download and install the latest Sterling B2B Integrator patch.	
3	Tune Sterling B2B Integrator for best performance. See <i>Performance Management</i> for more information.	
4	Creating user accounts and configuring permissions . See <i>User Account Permissions</i> for more information.	
5	Configure services and adapters. See <i>Services and Adapters</i> for more information.	
6	Create data maps. See <i>Data Maps</i> for more information.	
7	Create business process models. See <i>Business Process Models</i> for more information.	
8	Create business process model schedules. See <i>Business Process Model Schedules</i> for more information.	
9	Associate communications adapters with business processes. See <i>Communications Adapters and Business Processes</i> for more information.	

Step	Task	Notes
10	Create trading partner profiles. See <i>Trading Partner Profiles</i> for more information.	
11	Test business process . See <i>Business Process Test</i> for more information.	
12	Schedule archive and purge of the database. See <i>Database Archive and Purge Schedule</i> for more information.	

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## Sterling B2B Integrator Implementation Process

These topics describe the implementation stages for Sterling B2B Integrator. The topics are presented in logical order and follow the order of the previous checklist table.

The stage descriptions do not indicate the role of the user performing the tasks in each stage, but assume the appropriate user is doing each step in the process. The user may be a system administrator or any other user having responsibility for the described tasks.

### Architectural Design Plan

Your architectural design plan details the ways you will use Sterling B2B Integrator and the components and features you will employ in the process. This stage is perhaps the most intensive part of your overall implementation of Sterling B2B Integrator. The more accurate and detailed your plans are, the more efficiently your implementation will progress.

Your plan centers on determining the processes your business needs to automate and integrate. The processes will include high-level considerations such as plans to:

- Set up clusters or use multiple nodes of Sterling B2B Integrator
- Do internodal document tracking
- Set up a perimeter server and other components in the DMZ

The planning process becomes complex as you study it from a software perspective and consider how you will achieve the objectives.

For each process, IBM® professionals can help you to define the business process model you will create in Sterling B2B Integrator, including the services, adapters, components and technologies you need, the systems that Sterling B2B Integrator will interact with, and exactly what has to happen to the data at each step in a process. All of these determinations affect your required system size.

### System and Hardware Requirements

Before installing Sterling B2B Integrator, you must ensure that your operating system and hardware meet published Sterling B2B Integrator requirements and the requirements specific to your customized Sterling B2B Integrator implementation.

To estimate your system requirements, you need to determine the processes, components, and transaction volume required for your implementation. IBM personnel are available to assist you in this effort.



For minimum requirements, see *Sterling B2B Integrator System Requirements*.

### **Size Requirements**

System size is the volume of activity your system can support. The size is computed by measures such as processing speed, RAM (random access memory), CPUs (central processing units), and free disk space.

When you plan your implementation, remember that the published minimum size requirements support Sterling B2B Integrator, but may not allow for any increased capability required by the particulars of your implementation, such as the number of transactions processed and the amount of data transferred.

Your implementation may include one or more test environments in addition to the production environment. Running a test environment is recommended, and Sterling B2B Integrator enables you to bundle the work from the test environment and migrate it to the production environment when you are ready.

### **Product Training**

Formal product training provides detailed instruction for configuring and interacting with Sterling B2B Integrator. Training is provided in classrooms at select IBM locations, but may also be available on site at your company. Contact your IBM sales representative for details.

### **Sterling B2B Integrator Installation**

IBM Consulting Services may install Sterling B2B Integrator for you, or your system administrator may install it.

### **DMZ Considerations**

You can install Sterling B2B Integrator so that different components are installed on different machines.

The processing engine (Integration Broker) must be installed in your most secure LAN (local-area network) in order to efficiently process your mission critical data.

However, you can install some components in your DMZ (a computer or small subnetwork that operates between a trusted internal network, such as a corporate private LAN, and an untrusted external network, such as the public Internet). Typically, a DMZ contains devices accessible to Internet traffic, such as Web (HTTP) servers, FTP servers, SMTP (e-mail) servers, and DNS servers, as well as a perimeter server for security.

Sterling B2B Integrator components typically installed in the DMZ are communications adapters that act as HTTP servlets interfacing with the Integration Broker inside your LAN. Communication channels are opened only from the secure LAN to the DMZ, and all data traveling through the DMZ is encrypted.

Any or all Sterling B2B Integrator components may also reside on the same computer, if your network does not have a DMZ.

## **Sterling B2B Integrator Performance and Tuning**

Performance tuning enables you to configure Sterling B2B Integrator for the most efficient performance according to your specific needs. After installation, you must tune Sterling B2B Integrator to change the database settings, memory allocations, and other settings so that Sterling B2B Integrator performs as you want it to. You may allocate more or less system memory to specific components, database pools, or cache to specific components of Sterling B2B Integrator.

A wizard-type interface guides you through the performance tuning selections. The system suggests property settings based on your operating system. You can let Sterling B2B Integrator automatically make these settings or you can manually enter other settings.

If you add volume or hardware to your system, review your performance tuning settings.

### **User Account Permissions**

Role-based security enables you to assign permissions to users or groups of users based on the tasks they must use Sterling B2B Integrator to complete. Carefully consider the users who will access the system, and create the appropriate user groups with the related permissions for those users, and then create the user accounts so that the users may access Sterling B2B Integrator.

Menu options for system components to which users do not have permission do not display for those users in the interface.

### **Services and Adapters**

When you created your architectural design plan, you planned the structure for each of your business process models, and noted the services required to execute each process. Configuring services and adapters makes them available in the Graphical Process Modeler so that you can include them in your business process models.

You configure your services (including adapters) in the Sterling B2B Integrator interface, where a setup wizard lets you select the desired service and guides you through the settings. The settings dictate the specifics of the activities to be performed by the services, such as files in which to place extracted data, required IP addresses or ports, time-out values, and so on.

If you need to develop custom services for any of your business process models, use the MESA Developer Studio SDK.

### **Data Maps**

Data maps specify mapping instructions for the proper transformation of data. To use the instructions in a map, you must compile the map. A compiled map is a translation object, which provides instructions for translating one format to another in a way that can be interpreted by the translator.

When creating your business process models, you associate translation services with the appropriate translation objects you have created for that step in the process.

Use the Map Editor to create any translation objects you need to include in your processes and check them in to Sterling B2B Integrator.

### **Checking Maps In and Out of Sterling B2B Integrator**

Sterling B2B Integrator treats process models, maps, and Web templates (created using Web Extensions) as business documents for which it has a version control system. To use these documents, you must check them into and out of the system. When a document is checked out, the system locks it so that other users can not modify it at the same time. When you check in a document, Sterling B2B Integrator stamps it with a version identifier. You may use a previous version for editing, activating, or replacing more recent versions at any time.

### **Map Migration**

The Sterling B2B Integrator Map Conversion utilities enable you to quickly and easily convert maps created using other IBM products to Sterling B2B Integrator maps. The map conversion functionality enables you to import maps into the Map Editor from the original Sterling Gentran:Server<sup>®</sup> map files.

For Sterling Gentran:Server for iSeries and Sterling Gentran:Structure for z/OS maps, the map links, standard rules, extended rules, conditional relationships, and user exits are not converted by the functionality. You must add these items in to the converted map.

For Sterling Gentran:Server for UNIX maps, the simple links (unless you specify that they should be converted), standard rules, extended rules, conditional relationships, and user exits are not converted by the functionality. You must add these items in to the converted map.

### **Business Process Models**

Your architectural design plan includes details describing the business process models you must create to instruct Sterling B2B Integrator regarding the specifics of your processes. The business process models configure the processing required to complete business activities facilitated by Sterling B2B Integrator. To create your business process models, use the Graphical Process Modeler (GPM). After creating the business process models, check them in to Sterling B2B Integrator through the interface.

You can modify predefined business process models (including any sample business process models) instead of creating your models completely independently.

For detailed instructions on creating and managing business process models, see *Manage Business Processes*.

### **Business Process Model Schedules**

You must create schedules for any business process models that you want Sterling B2B Integrator to initiate at specific intervals, dates, or times. Using the scheduling tools in the Sterling B2B Integrator, you can configure periodic intervals or a regular time of the day or week for a business process to run, as well as schedule a business process to run at system startup.

The wizard technology enables you to select the business process model you want to schedule and leads you through the steps.

## **Communications Adapters and Business Processes**

After your business process models are created and checked in, you must associate any communications adapters that will accept unsolicited communication (these are known as bootstrap adapters) with the business process models they will invoke. These adapters have a field in their configuration parameters to select the business process.

## **Trading Partner Profiles**

Trading profiles are collections of records that describe the technology and business capabilities of your business partners to engage in e-business with each other. Sterling B2B Integrator uses the trading profile data to link your trading partners with the business process models you create to handle that partner's documents.

While you can create trading partner profiles at any time, they are commonly created after you have defined a business process or translation map. Trading profiles referenced in EDI transactions require envelope information, which you will know after creating the map.

Within the Sterling B2B Integrator interface, you can access Basic and Advanced options for creating your trading profiles. The process involves multiple steps as you enter information related to identification, document transport and exchange, delivery channel, packaging, and so on. Security information unique to the partner is also stored here, such as digital certificate identification.

For detailed information and instructions, see *Managing Trading Partners*.

## **Business Process Test**

As a test, run the business processes you have created. You can start them manually or schedule a run time and test that the scheduled start works in conjunction with the rest of a process.

Monitor the processes to ensure that they run properly, and make any modifications as needed. For instructions, see *Monitoring and Troubleshooting*.

## **Database Archive and Purge Schedule**

In the same manner that you schedule business processes you have created, you can schedule the intervals at which you want Sterling B2B Integrator to archive and purge the contents of the database. Predefined Sterling B2B Integrator business processes manage these activities.

For details and instructions about configuring the archive and purge activities for your implementation of Sterling B2B Integrator, see *Archiving and Purging Activities*.

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