SYBASE®

Upgrade Guide

PATRIOTcompliance Solution

Version 2.2

Contents

About This Book

This book describes how to upgrade and configure products in the PATRIOTcompliance Solution.

Audience

Sybase Professional Services is the principal audience for this book.

How to use this book

This book contains the following chapters:

- Chapter 1, "Introduction," briefly describes the PATRIOTcompliance Starter Kit and its components.

- Chapter 2, "Upgrading to version 2.2," provides detailed upgrade instructions.

Related documents

New Era of Networks Process Server 3.9.1 Installation Guide

New Era of Networks Process Server 3.9.1 Release Bulletin

TightLink Solution Server UpgradeNotes.htm

Sybase certifications on the Web

Technical documentation at the Sybase Web site is updated frequently.

❖ **Finding the latest information on product certifications**

1   Point your Web browser to Technical Documents at http://www.sybase.com/support/techdocs/.

2   Select Products from the navigation bar on the left.

3   Select a product name from the product list and click Go.

4   Select the Certification Report filter, specify a time frame, and click Go.

5   Click a Certification Report title to display the report.

❖ **Creating a personalized view of the Sybase Web site (including support pages)**

Set up a MySybase profile. MySybase is a free service that allows you to create a personalized view of Sybase Web pages.

1   Point your Web browser to Technical Documents at http://www.sybase.com/support/techdocs/.

2 Click MySybase and create a MySybase profile.

Sybase EBFs and software maintenance

❖ **Finding the latest information on EBFs and software maintenance**

1 Point your Web browser to the Sybase Support Page at http://www.sybase.com/support.

2 Select EBFs/Maintenance. Enter user name and password information, if prompted (for existing Web accounts) or create a new account (a free service).

3 Select a product.

4 Specify a time frame and click Go.

5 Click the Info icon to display the EBF/Maintenance report, or click the product description to download the software.

Conventions

The following style conventions are used in this manual:

• The names of files and directories are shown in *this font*.

• Command names, command option names, utility names, and other keywords are shown in this font.

• Variables, or words that stand for values that you fill in, are shown in *this font*.

• Database objects are shown in this font.

If you need help

Each Sybase installation that has purchased a support contract has one or more designated people who are authorized to contact Sybase Technical Support. If you cannot resolve a problem using the manuals or online help, please have the designated person contact Sybase Technical Support or the Sybase subsidiary in your area.

CHAPTER 1   Introduction

This chapter introduces Sybase PATRIOTcompliance Solution to financial institutions.

PATRIOTcompliance Solution overview

The Sybase PATRIOTcompliance Solution allows financial institutions to automate name filtering, intra-day and historical transaction filtering, and enterprise wide customer activity monitoring to meet the requirements of the USA PATRIOT (Uniting and Strengthening America by Providing Appropriate Tools Required to Intercept and Obstruct Terrorism) legislation.

The PATRIOTcompliance Starter Kit provides the infrastructure components needed for the Sybase PATRIOTcompliance Solution, including:

• New Era of Networks Business Process Integration (BPI) Suite

• New Era of Networks Adapter for Flat Files

• Sybase Enterprise Portal

• TightLink CIS

The PATRIOTcompliance Solution templates allow the installation and configuration of the separate products into a single solution. These templates include metadata to assemble the products, application server components, and database stored procedures to perform complex, highly-specialized functions.

CHAPTER 2 **Upgrading to version 2.2**

This chapter tells you how to upgrade your system to version 2.2 of the PATRIOTcompliance Solution.

Overview

This upgrade to the PATRIOTcompliance Solution includes an updated ROLLUP version of the PATRIOT Compliance Starter Kit. Sybase recommends that you install this updated Software Release as soon as possible.

This upgrade is distributed as a zip file and is available for download from the EBFs/Maintenance page at http://www.sybase.com/downloads.

Warning! Sybase strongly recommends that a backup of all components be done before you begin this upgrade. You must re-create any customization of the PATRIOT solution templates.

Issues addressed in this release

CR#	Description
CR#332858	Previous versions of PATRIOT Starter Kit sometimes allowed users to log in more than once with the same login name. Updates to the portalinterface.properties allow you to restrict users to a single login at a time.
	This step is optional and not required for successful deployment.
CR# 332855	Changes to *security.properties* allow you to set the *number* of days, months or years that a password remains valid; the default is 0, which means passwords are valid indefinitely.
	Duration parameters are expressed in the *<number>* of days, months, or years the password remains valid. Count begins from the day you create or modify the password. Changing the password via the Account Management portlet before the expiration date resets the count.
	EP Security locks users who fail to change their passwords within set duration parameters out of the system.
CR# 327011	Pat LoggedIn Users is a new portlet that identifies all users currently logged into the system.

CR#	Description
CR# 333653	PATRIOTcompliance Starter Kit 2.2 includes a script which creates a mechanism for customers who want to make their EP instance use non-sa database logins. These logins include sufficient permissions to let EP applications(s) connect to the patriot database, portal interface, and search cache
	Adding a non-sa user connection involves running a script, `ep_login.sql`, that creates three new login names **PATRIOTdbConnection**, **PortalInterfaceCache**, and **epSearchCache**. You then open Jaguar Manage in EAserver to add the actual connections.
	This step is optional and not required for successful deployment.
CR# 334386, CR# 336723	Customers, employees, or external accounts may be placed on a cleared list to allow their transactions to pass through the PATRIOT Solution without being flagged as a hit. Use the Pat Cleared List Adm portlet to administer the cleared list. In this portlet, you can search entries, make entries, or flag entries as inactive.
	Changes to the Pat Cleared List Admin portlet now allow you to clear customers, employees, or external accounts from multiple lists at the same time. A new column in the search list identifies users who make changes to the cleared list.
CR# 334776	Stop words are words that occur frequently in transactions and are irrelevant to the suspect search. The Stop Words Candidate portlet is a new portlet which identifies how frequently certain words appear in various lists. Use this portlet to identify potential candidates for the stop words list.
CR# 328827, CR# 323431	Use the Pat Search List portlet to look up a suspect, employee, customer, country, or address with the search engine. Pat Search List returns a score that indicates the percent certainty for each match.
	Previous versions of the Pat Search List portlet limited suspect searches to name. Customers can now search for suspects by country and address. Country and address check boxes now appear just above the Search for Suspect button. Country is the default search criteria; to search by street address you must click the Address button.

Contents of the 2.2 release

Refer to the descriptions of the files below for individual installation instructions. Directory paths below are in UNIX notation. For Windows, change the forward slashes to back slashes.

Target directory	Filename
\..	*patnfg22.pdf*
	pat_upgrade.pdf
	pat_cop.pdf
	patsag.pdf
	EBF1208x_README.HTML
	EBF1208x_Buglist.txt
	EBF1208x_Filelist.txt
\database	*ep_login.sql*
	PatriotDB2.2_Upgrade.sql
\edl	*pPostFilter.edl*
	lPatriot.edl
\formats	*custcomp.exp*
	stdcustrecformats.exp
	stdcustrecformatscomp.exp
	stdmoneytransformats.exp
	stdmoneytransformatscomp.exp
\jaguar	*Filter.properties*
	dispatcher.jar
\portlets	*onelogin.zip*
	PatAcctManagementPortlet.pz
	PatriotPortlets22.pz
\tightlink	*clientNew.xml*
	clientupdate212.xml
	Tightlink212Upgrade.doc

❖ **Loading Release 2.2**

You must have 2.1.2 installed or upgrade from 2.1.1 prior to adding the EBF.

1 Backup the current PATRIOT related directories to a safe place.

- *%PATRIOT%*

- *%JAGUAR%\java\classes\com\sybase\patriotact\filter*

- *%JAGUAR%\html\classes\com\sybase\ep\portalinterface\tasks*

- *%JAGUAR%\Repository\IDL\com\sybase\patriotact\filter*

2   Extract the PATRIOT EBF files into a temporary location.

   The target directory of unzipping the EBF archive will be the installation directory of PATRIOT (*%PATRIOT%* for Windows; *$PATRIOT* for Solaris)

3   Make sure you have ASE and EAServer up and running.

Verifying system environment variables

Follow these steps to verify or set the environment variables required for configuration.

1   Verify that the SYBASE environment variable is set. The SYBASE environment variable is the root directory of Sybase applications. For example, *SYBASE=/software/sybase* (Solaris) or *SYBASE=c:\Sybase* (Windows).

2   Verify that the SYBASE_ASE environment variable is set. This is the directory under *$SYBASE* (Solaris) or *%SYBASE%* (Windows) where Adaptive Server Enterprise has been installed. For example, *SYBASE_ASE=ASE-12_5*.

3   Verify that the SYBASE_OCS environment variable is set. This is the directory under *$SYBASE* (Solaris) or *%SYBASE%* (Windows) where Open Client/Server has been installed. For example, *SYBASE_OCS=OCS-12_5*.

4   Set the JAGUAR environment variable. This is the directory under *$SYBASE* (Solaris) or *%JAGUAR%* (Windows 2000) where EAServer has been installed.

   Solaris example: *JAGUAR=/software/sybase/EAServer*

   Windows 2000 example: *JAGUAR=c:\Sybase\EAServer*

5   Set the *$JAVA_HOME* (Solaris) or *%JAVA_HOME%* (Windows) environment variable. This environment variable points to a directory where a Java JDK is installed.

   Solaris example: *JAVA_HOME=$JAGUAR/jdk/jdk1.3*

Windows example: *JAVA_HOME=$JAGUAR\shared\sun\jdk\jdk.3*

6   Set the PATRIOT environment variable. This is the directory where you initially copied the contents of the PATRIOTcompliance Starter Kit Solution Template CD.

Solaris example: *PATRIOT=$PATRIOT*

Windows example: *PATRIOT=%PATRIOT%*

Upgrading the PATRIOT database

Release 2.2 includes scripts that allow you to upgrade the PATRIOT database (Patriotdb) and New Era of Networks database (NNSYdb). There are separate instructions for Solaris and Windows-based installations.

Solaris

Use these instructions to upgrade your database on Solaris.

1   Open a command window. Navigate to the *$PATRIOT/release2.2/database* directory.

2   Execute the *PatriotDB2.2_Upgrade.sql* script, with the following syntax:

```
isql -S <ASE server name> -U <ASE_username> -P
<ASE_password> -i PatriotDB2.2_Upgrade.sql -o
```

3   Review and correct any errors in the output file.

Windows

Use these instruction to upgrade your database on Windows.

1   Open a command window. Navigate to the *%PATRIOT%\database* directory.

2   Execute the *PatriotDB2.2_Upgrade.sql* script, with the following syntax:

```
isql -S <ASE server name> -U <ASE_username> -P
<ASE_password> -i PatriotDB2.2_Upgrade.sql -o
```

3   Review and correct any errors in the output file.

Modifying PATRIOT connection caches

PATRIOTcompliance Starter Kit 2.2 includes a script which creates a mechanism for customers who want to make their EP instance use non-sa database logins. These logins include sufficient permissions to let EP applications(s) connect to the patriot database, portal interface, and search cache.

Adding a non-sa user connection involves running a script, `ep_login.sql`, that creates three new login names **PATRIOTdbConnection**, **PortalInterfaceCache**, and **epSearchCache**. You then open Jaguar Manager in EAserver to add the actual connections.

This step resolves CR# 333653 is optional and not required for successful deployment.

Executing the upgrade script

This section tells you how to execute the upgrade script. There are separate instructions for Solaris and Windows-based installations.

Solaris

Use these instructions if you are upgrading a Solaris-based installation.

1   Open a command window, and navigate to the *$PATRIOT/release2.2/database* directory.

2   Execute the *ep_login.sql* script, with the following syntax:

```
isql -S <ASE server name> -U sa -P <ASE_password> -
i ep_login.sql -o <outputfile>
```

3   Review and correct any errors in the output file.

Windows

Use these instructions if you are upgrading a Windows-based installation.

1   Open a command window, and navigate to the *%PATRIOT%\release2.2\database* directory.

2   Execute the *ep_login.sql* script, with the following syntax:

```
isql -S <ASE server name> -U sa -P <ASE_password> -
i ep_login.sql -o <outputfile>
```

3   Review and correct any errors in the output file.

Adding the connection caches

The next series of steps adds the connection properties for the new login names.

❖ **Adding the PATRIOTdbConnection**

1 Connect to Jaguar Manager as `jagadmin`.

2 Expand **Jaguar Manager** | **Connection Caches**.

3 Right-click **PATRIOTdbConnection**, choose **Connection Cache Properties**.

  When the Connection Cache Properties sheet appears, the General tab is in focus.

4 In the **User Name** box, change the **sa** user name to **patriotlogin**.

5 In the **Password** box, type **password**.

6 Click **Refresh**, then click **Ping** to test the connection.

7 Click **OK** to return to Jaguar Manager.

❖ **Adding the PortalInterfaceCache connection**

1 Right-click **PortalInterfaceCache**, choose **Connection Cache Properties**.

  The Connection Cache Properties panel appears.

2 In the **User Name** box, change the **sa** user name to **portaliflogin**.

3 In the **Password** box, type **password**.

4 Click **Refresh**, then click **Ping** to test the connection.

5 Click **OK** to return to Jaguar Manager.

❖ **Adding the epSearchCache connection**

1 Right-click **epSearchCache** and select **Connection Cache Properties**.

2 In the **User Name** box, change the **sa** user name to **epsearchlogin**.

3 In the **Password** box, type **password**.

4 Click **Refresh**, then click **Ping** to test the connection.

5 Click **OK** to return to Jaguar Manager.

6 Shut down and restart Jaguar Server.

Known issue

Non-sa user connection caches to the PATRIOT database lack the appropriate authority to retrieve data from ASE sybsecurity database. Granting system security officer role (sso_role) to the user of patriot database connection resolves this issue. You must run the following procedure for the Pat Audit Trail portlet to work properly.

Although there is a work around, this issue has been logged in QTS as CR# 361596 and will be addressed in a future release.

❖ **Granting an sso_role to a patriot db connection user**

1   Open a command window, and run the following statements:

```
isql -S <ASE server name> -U sa -P <ASE_password>
```

2   Run the following scripts:

```
use master

go

grant role sso_role to patriotlogin

go
```

3   Shut down and restart Jaguar Server.

Upgrading Process Server process definitions

This procedure overwrites all process definitions and plug-ins. There are separate procedures for Windows and Solaris based installations.

Windows   Use these instructions if you are upgrading a Windows-based installation.

1   Copy the contents of the *%PATRIOT%\Release2.2\edl* directory to *%SYBASE%\ProcessServer-3_9\bin\edl*. This overwrites the set of existing files.

2   Open a command window, and change to the *%SYBASE%\ProcessServer-3_9\bin\edl* directory.

3   Run the following commands:

```
call EDLUtil put ..\edl\lPatriot.edl
call EDLUtil put ..\edl\pPostFilter.edl
```

Solaris   Use these instructions if you are upgrading a Solaris-based installation.

1   Copy the contents of the *$PATRIOT/Release2.2/edl* directory to *$SYBASE/ProcessServer-3_9/bin/edl*.

2   Open a command window, and change to the *$SYBASE/ProcessServer-3_9/edl* directory.

3   Run the following commands:

```
EDLUtil put ..\edl\lPatriot.edl
EDLUtil put ..\edl\pPostFilter.edl
```

Upgrading formats

The standard money transaction and customer record formats have changed for this release.

The following files have been updated.

- *custcomp.exp*

- *stdcustrecformats.exp*

- *stdcustrecformatscomp.exp*

- *stdmoneytransformats.exp*

- *stdmoneytransformatscomp.exp*

Importing the new formats

You will need to import the new formats. Make sure you set *NNSY_ROOT* to the *%SYBASE%\nnsy* (Windows) or *$SYBASE/nnsy* (Solaris) directory.

Windows

Use these instructions if you are importing the formats to a Windows-based installation. Perform this step if you have **not** updated your formats.

1 Create the directory *%SYBASE%\nnsy\formats* if it does not already exist.

2 Copy the format files from the *%PATRIOT%\Release2.2\formats** directory to the *%SYBASE%\nnsy\formats* directory.

3 Open a command window, and change to the *%SYBASE%\nnsy* directory.

4 Run the following commands:

```
NNFie -i formats\custscomp.exp -s new_format_demo -o

NNFie -i formats\stdcustrecformatscomp.exp -s
new_format_demo -o

NNFie -i formats\stdmoneytransformatscomp.exp -s
new_format_demo -o
```

Solaris   Use these instructions if you are importing the formats to a Solaris-based installation. Perform this step if you have **not** updated your formats

1   Create the directory *$SYBASE/nnsy/formats* if it does not already exist.

2   Copy the format files from the *$PATRIOT/Release2.2/formats/** directory to the *$SYBASE/nnsy/formats* directory.

3   Open a command window, and change to the *$SYBASE/nnsy* directory.

4   Run the following commands:

```
NNFie -i formats\custscomp.exp -s new_format_demo -o

NNFie -i formats/stdcustrecformatscomp.exp -s
new_format_demo -o

NNFie -i formats/stdmoneytransformatscomp.exp -s
new_format_demo -o
```

Note
Running the NNFie commands overwrites formats in your database and generates conflict warnings. Because field names do not change and old maps are not affected, you can ignore these warnings.

Upgrading EAServer components

A new version of the PATRIOT Act EJB and an update to the jConnect files are included with this upgrade.

❖   **Deleting the existing PATRIOTAct package**

Before you can upgrade to 2.2, you must remove the current package.

1   Connect to Jaguar Manager as 'jagadmin'

2   Expand **Jaguar Manager** | **Packages**.

3   Right-click **PatriotAct**, choose **Delete Package**, then click **Yes** to delete the package.

4   Expand **Jaguar Manager** | **Servers** | **Jaguar** | **Installed Services**.

5   Right-click **Loader**, choose **Remove Service**, then click **OK** to remove the loader.

6   Right click **Scheduler**, choose **Remove Service**, then click **OK** to remove the scheduler.

7   Expand **Jaguar Manager** | **Servers** | Jaguar and select **Shutdown**.

8   Right-click **Jaguar**, choose **Shutdown**.

Make sure the *%JAGUAR%\Repository\Component\PatriotAct* directory (Windows) or *$JAGUAR/Repository/Component/PatriotAct* (Solaris) directory does not exist. If it does, start Jaguar again and redo steps 1 - 7.

9   Start Jaguar Server.

❖   **Deploying the new dispatcher.jar to Jaguar**

Importing an EJB into the Jaguar Service allows the component to register with the application server.

1   Expand **Jaguar Manager**, right click **Packages**, point to **Deploy**, choose **EJB Jar**.

2   When the Deploy Wizard appears, click **Browse**, navigate to one of the following directories:

•   *%PATRIOT%\Release2.2\jaguar* (Windows)

•   *$PATRIOT/Release2.2/jaguar* (Solaris)

Choose *dispatcher.jar*, click **Select**.

3   Verify the following deployment options.

Option Group	Options
Deployment Strategy	Full Deployment
Deployment Options	• Prompt before overwriting objects
	• Automatically generate EJB stubs and skeletons
	• Use Interoperable Naming

4   Click **Next** to deploy the file, then click **Close** to return to Jaguar Manager.

5   Expand **Jaguar Manager** | **Servers** | **Jaguar**.

6   Right-click **Installed Packages**, choose **Install an Existing Package**, select **PatriotAct**, then click **OK**.

❖   **Creating the Scheduler component**

Follow the steps in this section to create a Scheduler component.

1   Expand **Jaguar Manager** | **Servers** | **Jaguar** | **Installed Packages**.

2   Right-click **PatriotAct**, choose **New Component**.

3   When the **Component Wizard** appears, choose **Define New Component**, click **Next**, and **Next** again.

4   In the **Component name** box, type **Scheduler**, click **Finish**.

5   When the **Component Properties** sheet appears, the **General** tab is in focus. Modify the **Java Class** name to read *com.sybase.patriotact.filter.SchedulerImpl*, then click **OK** to return to Jaguar Manager.

6   Expand the **Scheduler** component, right-click **Interfaces**, choose **Add Interfaces**.

    The Install Interface dialog appears.

7   From the **Available IDL Interfaces** drop down box, choose **CtsServices**.

    Three CtsServices appear in the right pane.

8   Select **CtsServices::Generic Service**, click **Add**, then click **Install**.

    The Scheduler component is now available as part of the PatriotAct package.

9   Expand **Servers** | **Jaguar**.

10 Right-click **Installed Services**, choose **Install Service**, select **PatriotAct/Scheduler** from the list, then click **OK** to return to Jaguar Manager.

❖   **Creating the Loader component**

1   Expand **Jaguar Manager** | **Servers** | **Jaguar** | **Installed Packages**.

2   Right click **PatriotAct**, choose **New Component.**

3   When the Component Wizard appears, choose **Define New Component**, click **Next**, then click **Next** again.

4   In the **Component Name** box, type **Loader**, then click **Finish**.

5   When the **Component Properties** sheet appears, the **General** tab is in focus. Modify the **Java Class** name to read *com.sybase.patriotact.filter.LoaderImpl*, then click **OK** to return to Jaguar Manager.

6   Expand the new Loader component, right-click **Interfaces**, select Add Interfaces.

7   From the **Available IDL Interfaces** drop down box, choose **CtsServices**.

Three CtsServices appear in the right pane

8   Select **CtsServices::Generic Service**, click **Add**, then click **Install**.

The Loader component is now available.

9   Expand **Servers** | **Jaguar**.

10 Right-click **Installed Services**, choose **Install Service**, select **PatriotAct/Loader** from the list, then click **OK** to return to Jaguar Manager.

❖   **Generating Scheduler stubs and skeletons**

Generating Java stubs and skeletons ensures that the Jaguar Server has the information necessary to interact with the components.

1   Expand **Servers** | **Jaguar** | **Installed Packages** | **PatriotAct**.

2   Right-click on the **Scheduler** component, choose **Generate Stub/Skeleton**.

3   When the Generate Stubs and Skeletons dialog appears, choose the following options:

   •   **Generate Stubs**

   •   **Generate Java Stubs** and choose **CORBA** from the drop down box

   •   **Generate Java Files** and use the default directory

   •   **Compile Java Stubs**

   •   **Generate Skeletons** and use the default directory

   •   **Compile Java Skeletons** and use the default directory

   •   Leave everything else as default

4   Click **Generate**.

5   After the code generates successfully, click **OK** to return to Jaguar Manager.

❖   **Generating Loader stubs and skeletons**

1   Right-click on the **Loader** component, choose **Generate Stub/Skeleton**.

2   When the Generate Stubs and Skeletons dialog appears, choose the following options:

   •   **Generate Stubs**

   •   **Generate Java Stubs** and choose **CORBA** from the drop down box

- **Generate Java Files** and use the default directory

- **Compile Java Stubs**

- **Generate Skeletons** and use the default directory

- **Compile Java Skeletons** and use the default directory

- Leave everything else as default

3   Click **Generate**.

4   After the code generates successfully, click **OK** to return to Jaguar Manager.

❖ **Generating PatriotAct stubs and skeletons**

1   Right-click on the **PatriotAct** component, choose **Generate Stub/Skeleton**.

2   When the Generate Stubs and Skeletons dialog appears, choose the following options:

- **Generate Stubs**

- **Generate Java Stubs** and choose **EJB** from the drop down box

- **Generate Java Files** and use the default directory

- **Compile Java Stubs**

- **Generate Skeletons** and use the default directory

- **Compile Java Skeletons** and use the default directory

- Leave everything else as default

3   Click **Generate**.

4   After the code generates successfully, click **OK** to return to Jaguar Manager.

Updating the filter properties file

Add the following settings into the existing *Filter.properties* file in *%JAGUAR%\bin* (Windows) or *$JAGUAR/bin* (Solaris):

```
#PatStopWords

select_preMatchStopWords =  select word from
PatStopWords where is_active = 1
```

```
select_scoreMatchStopWords =  select word from
PatStopWords where priority = 1 and is_active = 1

QuickWordsThreshhold=30
```

Setting the PATRIOTAct component properties

Follow the instructions in this section to set the PATRIOTAct component properties.

❖ **Setting Controller component properties**

1 Expand **Servers** | **Jaguar** | **Installed Packages** | **PatriotAct**.

2 Right-click **Controller**, choose **Component Properties**.

3 When the Controller properties sheet appears, click the **Transactions** tab, choose **Not Supported**.

4 Click the **Run As Identity** tab, do this:

  • Set the **Run As Identity** property to **system**.

  • Set the **Mapped to Jaguar Identity** property to **system**.

5 Click the **Resource Refs** tab, do this:

  • In the **Resource factories referenced in code** group, set the **Sharing Scope** of the *jms/JMSQCFactory* to **shareable**, then choose **javax.jms.QueueConnectionFactory** as the **Resource Link**.

  • In the **Resource factories referenced in code** group, set the **Sharing Scope** of the *jdbc/DBConnection* to **shareable**, then choose **PATRIOTdbConnection** as the **Resource Link**.

6 Click the **Resource Env Refs** tab, do this:

  • In the **Resource environmental references** group, click *jms/ErrorQueue*, then set the **Link Value** to **error**.

  • In the **Resource environmental references** group, click **jms/ResultQueue** then set the **Link Value** to **from_filters**.

7 Click the **MDB Type** tab, set the **Name** property to **to_filters**.

8 Click **OK** to return to Jaguar Manager.

❖ **Setting the FTPLoad component properties**

1 Right-click **FTPLoad**, choose **Component Properties**.

2   When the Connection Properties sheet appears, click the **Transactions** tab, choose **Not Supported**

3   Click the **EJB Refs** tab, do this:

In the **EJBs referenced in code** group, click *ejb/NightlyFilter*, then set the **Link Value** to **PatriotAct/NightlyFilter**.

4   Click the **Resource Refs** tab, do this:

In the **Resource factories referenced in code** group, set the **Sharing Scope** of the *jdbc/CacheName* to **shareable**, then set the **Resource Link** to **PATRIOTdbConnection**.

5   Click **OK** to return to Jaguar Manager.

❖   **Setting the Loader component properties**

1   Right-click **Loader**, choose **Component Properties**.

2   When the Connection Properties sheet appears, click the **Transactions** tab, choose **Not Supported**.

3   Click **OK** to return to Jaguar Manager.

❖   **Setting the NightlyFilter component properties**

1   Right-click **NightlyFilter**, choose **Component Properties**.

2   When the Connection Properties sheet appears, click the **Transactions** tab, choose **Requires New**.

3   Click the **Resource Refs** tab, do this:

- In the **Resource factories referenced in code** group, set the **Sharing Scope** of the *jdbc/CacheName* to **sharable**, then set the **Resource Link** to **PATRIOTdbConnection**.

- In the **Resource factories referenced in code** group, set the **Sharing Scope** of the *jdbc/DBConnection* to **shareable**, then set the **Resource Link** to **PATRIOTdbConnection**.

4   Click **OK** to return to Jaguar Manager.

❖   **Setting the Scheduler component properties**

1   Right-click **Scheduler**, choose **Component Properties**.

2   When the Connection Properties sheet appears, click the **Transactions** tab, choose **Not Supported**.

3   Click **OK** to return to Jaguar Manager.

❖ **Setting the TableClean component properties**

1   Right-click **TableClean**, choose **Component Properties**.

2   When the **Connection Properties** sheet appears, click the **Transactions** tab, choose **Requires New**.

3   Click the **Resource Refs** tab, do this:

In the **Resource factories referenced in code** group, set the **Sharing Scope** of the *jdbc/CacheName* to **shareable**, then set the **Resource Link** to **PATRIOTdbConnection**.

4   Click **OK** to return to Jaguar Manager.

5   Shutdown and restart EAServer.

Configuring Portlets

This section tells you how to install and configure the 2.2 portlets.

❖ **Setting single login properties**

Previous versions of PATRIOT Starter Kit sometimes allowed users to login more than once with the same login name. Updates to the *portalinterface.properties* allow you to restrict users to a single login at a time.

1   Back up the following files.

> **Note**
> Directory paths below are in UNIX notation. For DOS, change forward slashes to back slashes; change *$JAGUAR* to *%JAGUAR%*.

Subdirectory	Filename
$JAGUAR/html/classes	*PI_Errors.properties*
$JAGUAR/html/classes/com/ sybase/ep/portalinterface	*Errors.class.*
$JAGUAR/html/classes/com/sybase/ep/ portalinterface/services	*SecurityServiceImpl.class*
$JAGUAR/META-INF	*MANIFEST.MF*

2   Extract *onelogin.zip* into *$JAGUAR*.

If WinZip notifies you that you are about to overwrite existing files, click Yes to confirm the file overwrite.

3   Back up *$JAGUAR/html/classes/portalinterface.properties*.

4   Use a text editor to open *portalinterface.properties*.

5   Add the following properties to the end of the file:

```
security.cache.name=SecDboCache
enforce.single.login=true
```

6   Save the *portalinterface.properties* file.

7   Shut down and restart Jaguar Server.

Installing updated portlets

This section tells you how to install updates to the portlets. There are separate instructions for Windows and Solaris-based installations.

Windows

Use these instructions to install the 2.2 portlets on Windows.

1   Copy the **.pz* files from *%PATRIOT%\portlets* to *%SYBASE%\PortalInterface-2_5\bin*.

2   With ASE and Jaguar Server running, open a command window and navigate to *%SYBASE%\PortalInterface-2_5\bin*.

3   Run *pz.bat* with the following syntax:

```
pz.bat -H <ASE_hostname> -N <ASE_Port> -U
<ASE_username> -P <ASE_password> -F
PatriotPortlets22.pz.
```

4   Select **Import Portlet from Archive** and press ENTER.

5   Select **Import Archived Portlets** and then press ENTER.

This step imports the portlets. Choose **ALL** to any overwrite question; choose **No** to any create duplicate question. An **Import Done** message notifies you when this process is complete.

6   Select **X** and **X** to exit the PortalZipper tool.

7   Shut down and restart Jaguar Server.

Solaris

Use these instructions in install the 2.2 portlets on Solaris.

1   Copy the **.pz* files from *$PATRIOT/portlets* to *$SYBASE/PortalInterface-2_5/bin*.

2   With ASE and Jaguar Server running, open a command window, and
      change to the *$SYBASE/PortalInterface-2_5/bin* directory.

3   Run *pz.sh* with the following syntax:

```
pz.sh -H <ASE_hostname> -N <ASE_Port> -U
<ASE_username> -P <ASE_password> -F
PatriotPortlets22.pz.
```

4   Select **Import Portlet from Archive** and press ENTER.

5   Select **Import Archived Portlets** and then press ENTER.

      This step imports the portlets. Choose **ALL** to any overwrite question;
      choose **No** to any create duplicate question. An **Import Done** message
      notifies you when this process is complete.

6   Select **X** and **X** to exit the PortalZipper tool.

7   Shut down and restart Jaguar Server.

Creating directories for the class files

If the following directories do not exist, create these directories for the new
class files.

Note
Directory paths below are in UNIX notation. For Windows, change forward
slashes to back slashes; change *$JAGUAR* to *%JAGUAR%*.

•   *$JAGUAR/html/classes/com/sybase/ilab*

•   *$JAGUAR/html/classes/com/sybase/ilab/utils*

•   *$JAGUAR/html/classes/com/sybase/ilab/pi*

•   *$JAGUAR/html/classes/com/sybase/ilab/pi/pim*

•   *$JAGUAR/html/classes/com/sybase/ilab/pi/pim/tasks*

•   *$JAGUAR/html/classes/com/sybase/ilab/pi/security*

•   *$JAGUAR/html/classes/com/sybase/ilab/pi/security/beans*

•   *$JAGUAR/html/classes/com/sybase/ilab/pi/security/services*

Installing the Account Management portlet

This section tells you how to install the Account Management portlet. There are separate instructions for Windows and Solaris-based installations.

Windows

Use these instructions to install the Account Management portlet on Windows.

1   With ASE and Jaguar Server running, open a command window, and copy *%PATRIOT%\Portlets\PatAcctManagementPortlet.pz* to *%SYBASE%\PortalInterface-2_5\bin*.

2   Change to the *%SYBASE%\PortalInterface-2_5\bin* directory.

3   Run *pz.bat* with the following syntax:

```
pz.bat -H <ASE_hostname> -N <ASE_port_number> -F
PatAcctManagementPortlet.pz
```

4   Select **Import Portlet from Archive** and press ENTER.

5   Select **Import Archived Portlets** and then press ENTER.

This step imports the portlets. Choose **ALL** to any overwrite question; choose **No** to any create duplicate question. An **Import Done** message notifies you when this process is complete.

6   Select **X** and **X** to exit the PortalZipper tool.

7   Change to *%JAGUAR%\html\portal\html\v4* directory, and use an editor to change the properties of the *ilab_changeInfo.html* and *ilab_changePWD.html* files. In both files, change the line that reads:

```
<jtf:setProperty name="IIOP_URL"
value="iiop://yongming-pc:9000"/>
```

to

```
<jtf:setProperty name="IIOP_URL"
value="iiop://<yourhost>:<yourport>"/>
```

8   Change to the *%JAGUAR%\html\classes\com\sybase\ilab\pi\pim\tasks* directory, and rename *PIMControl.class* to *PIMControl.class.old*

9   Shut down and restart Jaguar Server.

Solaris

Use these instructions to install the Account Management portlet on Solaris.

1   With ASE and Jaguar Server running, open a command window, and copy *$PATRIOT/Portlets/PatAcctManagementPortlet.pz* to *$SYBASE/PortalInterface-2_5/bin*.

2   Change to the *$SYBASE/PortalInterface-2_5/bin* directory.

3   Run *pz.sh* with the following syntax:

```
pz.sh -H <ASE_hostname> -N <ASE_port_number> -F
PatAcctManagementPortlet.pz
```

4   Select **Import Portlet from Archive** and press ENTER.

5   Select **Import Archived Portlets** and then press ENTER.

This step imports the portlets. Choose **ALL** to any overwrite question. An **Import Done** message notifies you when this process is complete.

6   Select **X** and **X** to exit the PortalZipper tool.

7   Change to the *$JAGUAR/html/portal/html/v4* directory, and use an editor to change the properties of the *ilab_changeInfo.html* and *ilab_changePWD.html* files. In both files, change the line that reads:

```
<jtf:setProperty name="IIOP_URL"
value="iiop://yongming-pc:9000"/>
```

to

```
<jtf:setProperty name="IIOP_URL"
value="iiop://<yourhost>:<yourport>"/>
```

8   Change to the *$JAGUAR/html/classes/com/sybase/ilab/pi/pim/tasks* directory, and rename *PIMControl.class* to *PIMControl.class.old*

9   Shut down and restart Jaguar Server.

Verifying the Account Management portlet deployment

This step tells you how to test the Account Manager portlet.

1   Start Internet Explorer and enter the URL:
`http://<jaguar_hostname>:8080/`.

2   Log into Portal Interface using the user ID, **pso**, with the password **123qwe**.

3   Click the **Admin** link at the top of the page.

4   On the **Admin Entry Page**, click **Choose Portlets** from the **Admin Portal Control**.

5   On the **Choose Portlets** panel, move the **Account Management portlet** from the **Available Portlets** box to the **Selected Portlets** box, click **Done**.

6   From the **Customize** drop down box, choose the **PATRIOT Test** page.

The PATRIOT Test page should display with the new portlet accessible.

Setting up Account Management for the pacuser

To enable access to each of the PATRIOT portlets for pacuser, you need to modify the properties for each portlet and include the PIUser Role as detailed below. These instruction assume that you are logged in as 'pso'.

1   Select the **Admin** link on the Welcome bar at the top of the browser to enter Administrative mode.

2   From the **Select a Page** drop down box in the upper right-hand corner of the page, select the **PATRIOT Test** page.

The **PATRIOT Test** page appears with the new **Account Management** portlet accessible.

3   For the **Account Management** portlet, do this:

• Click the **Edit** link in the title bar and modify the URL property from

```
iiop://yongming-pc:9000
```

to

```
iiop://<yourhost>:<yourport>
```

then click **Done**.

• From the **Select a Page** drop down box, select the **PATRIOT Test** page to return to the Admin Entry Page.

• Select the **PATRIOT Test** link in the snail trail to navigate back to the **PATRIOT Test** page

• Select the icon located next to the **Edit** hyperlink in each of the portlet title bars on the page.

• On the **Window Properties** panel, select the **Edit Portlet Properties** link to display the **Edit Portlet** panel containing the portlet properties.

• In the **Portlet Rights** section, select the **PIUser** role from the **Role List** and click the right arrow to move it to the **Roles with Rights to this Portlet** list on the right.

• Click **Done**.

4   Log out of Portal Interface.

5 Change to the *%JAGUAR%\html\classes\com\sybase\ilab\pi\pim\tasks* directory (Windows) or *$JAGUAR/html/classes/com/sybase/ilab/pi/pim/tasks* (Solaris) and rename *PIMControl.class.old* to *PIMControl.class*.

6 Shut down and restart Jaguar Server.

Creating the Account Management portlet for pacuser

Multiple portlet pages will be created for the PATRIOTcompliance Solution, and each page includes a number of the portlets imported into the Portal Interface.

1 Start Internet Explorer and enter the URL:

```
http://<jaguar_hostname>:8080/
```

2 Log into Portal Interface using the user ID **pacuser** with the password **pacuser**.

3 Click Add Page in the Portal Control. Name this page **Account Managment** and click **Done**.

4 When the **Choose Portlets** panel appears, select **Account Management** from the **Available Portlets** box on the left and click the right arrow to move each portlet to the **Selected Portlets** box on the right.

5 Click **Done** to save the portlet page with the selected portlets.

6 Log out of Portal Interface and close the browser.

Verifying deployment of the new and updated portlets

Test the newly deployed portlets.

1 If you are not logged in as **pso**, start Internet Explorer and enter the URL: *http://<jaguar_hostname>:8080/*, and log into Portal Interface with the user ID **pso** and password **123qwe**.

2 Select the **Admin** link on the **Hello, New Portal User** bar at the top of the page to enter the **Admin Entry Page**.

3 From the **Customize** drop down box, choose the page you want to use to test the portlets, **PATRIOT Test**, for example. Or you can create a new page to test the portlets. Click **Done**.

4   On the **Choose Portlets panel**, choose the new and updated portlets from the **Available Portlets** box and move them into the **Selected Portlets** box. These include:

- Pat Logged In Users

- Pd Exp Notification

- Stop Words Candidate

5   Click **Done**.

6   From the **Customize** drop down box, choose the page where you added the portlets, **PATRIOT Test** for example.

The test page appears with the portlets you selected.

Setting up the new portlets for pacuser

This series of steps tell you how to grant pacuser access rights to the new and updated portlets. This section assumes you are logged in as pso.

Note

The Pat Logged In Users portlet is intended for **pso** users only. Do not grant access rights to this portlet to pacuser.

1   On the **Admin Entry Page**, choose the test page, **PATRIOT Test** for example, where you added the new portlets from the **Customize** drop down box.

2   When the test page appears, do this for each new portlet on the page.

- Click the icon next to the **Edit** link on the title bar, and when the the Window Properties panel appears, click **Edit Portlet Properties**.

- On the **Edit Portlet** panel, in the **Portlet Rights** group, move **PIUser**from the **Role List** into the **Roles with Rights to this Portlet** box.

- Click **Done**.

- Choose the test page, **PATRIOT Test** for example, where you added the new portlets from the **Customize** drop down box.

3   Log out of Portal Interface.

Creating portlet pages for pacuser

1   If you are not logged in as **pacuser**, start Internet Explorer, enter the URL: *http://<jaguar_hostname>:8080/,* and log into Portal Interface with the user ID **pacuser** and password **pacuser**.

2   On the **Home Page**, click **Add Page** from the **Portal Control**, name the page, click **Done**.

3   On the **Choose Portlets** panel, move the appropriate portlets from the **Available Portlets** box into the **Selected Portlets** box on the right. Click **Done**.

Each Patriot portlet page should now be accessible from the **Personalize** drop down box in the upper right-hand corner. Select each of these pages to verify that the portlets have been installed and configured properly.

4   Repeat steps 2-3 to add the appropriate portlets for each new portlet page

5   Log out of Portal Interface and close the browser.

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