



Infor SmartStream® Installation Guide

Release 8.0
September 2012/Revised June 2026

Copyright © 1992 - 2026 Infor

Important Notices

The material contained in this publication (including any supplementary information) constitutes and contains confidential and proprietary information of Infor.

By gaining access to the attached, you acknowledge and agree that the material (including any modification, translation or adaptation of the material) and all copyright, trade secrets and all other right, title and interest therein, are the sole property of Infor and that you shall not gain right, title or interest in the material (including any modification, translation or adaptation of the material) by virtue of your review thereof other than the non-exclusive right to use the material solely in connection with and the furtherance of your license and use of software made available to your company from Infor pursuant to a separate agreement, the terms of which separate agreement shall govern your use of this material and all supplemental related materials ("Purpose").

In addition, by accessing the enclosed material, you acknowledge and agree that you are required to maintain such material in strict confidence and that your use of such material is limited to the Purpose described above. Although Infor has taken due care to ensure that the material included in this publication is accurate and complete, Infor cannot warrant that the information contained in this publication is complete, does not contain typographical or other errors, or will meet your specific requirements. As such, Infor does not assume and hereby disclaims all liability, consequential or otherwise, for any loss or damage to any person or entity which is caused by or relates to errors or omissions in this publication (including any supplementary information), whether such errors or omissions result from negligence, accident or any other cause.

Without limitation, U.S. export control laws and other applicable export and import laws govern your use of this material and you will neither export or re-export, directly or indirectly, this material nor any related materials or supplemental information in violation of such laws, or use such materials for any purpose prohibited by such laws.

Trademark Acknowledgements

The word and design marks set forth herein are trademarks and/or registered trademarks of Infor and/or related affiliates and subsidiaries. All rights reserved. All other company, product, trade or service names referenced may be registered trademarks or trademarks of their respective owners.

SmartStream is a registered trademark of Infor.

Publication Information

Release: Infor SmartStream 8.0

Publication date: September 2012/Revised June 2026

Contents

About This Guide

ix Introduction

Chapter 1 Overview of Installing SmartStream

1-1 The SmartStream Environment
1-3 The Installation Process
1-4 Planning Your Installation

Chapter 2 Preparing the Environment

2-1 Accessing the Latest Installation Information
2-3 Client Configuration for Installing International Version
2-4 Preparing the Installation Workstation
2-5 Establishing Connectivity in the SmartStream Environment
2-6 Installing Sybase PC Client and ODBC Drivers
2-9 Installing Microsoft SQL Server Client and ODBC Drivers

Chapter 3 Preparing and Installing the File Server

3-1 Before You Begin
3-2 About the File Server Setup Program
3-3 Considerations for SmartStream Language Kits
3-4 Prerequisite Tasks
3-6 Running the File Server Setup Program
3-10 Troubleshooting
3-13 Post-Installation Task for SmartStream
3-14 Post-Installation Task for Language Kits

Chapter 4 Preparing the Sybase Database Server

4-1 Before You Begin
4-2 About Preparing the Database Server

(continued)

Chapter 4

(continued)

- 4-3 Considerations for Installing Sybase Adaptive Server Enterprise
- 4-5 Using the dbsprep Program

Chapter 5 Preparing the Microsoft Database Server

- 5-1 Before You Begin
- 5-2 About Preparing the Database Server
- 5-3 Considerations for Installing Microsoft SQL Server

Chapter 6 Installing SmartStream Products on the Database Server

- 6-1 Before You Begin
- 6-2 About the Database Server Setup Program
- 6-3 Setting Up Environments
- 6-4 Running the Setup Program
- 6-8 Loading SmartStream Language Kits
- 6-9 Troubleshooting
- 6-11 Installing SmartStream Builder on the Database Server
- 6-13 Adding SmartStream Products Between Releases

Chapter 7 Preparing the SmartStream Client Workstations

- 7-1 Before You Begin
- 7-2 Considerations for Windows
- 7-3 Installing Sybase PC Client and ODBC Drivers
- 7-6 Installing Microsoft SQL Server Client and ODBC Drivers
- 7-8 Installing Microsoft Access
- 7-9 Considerations for SmartStream Budget
- 7-10 Installing Software for Pivot Table Functionality
- 7-11 Considerations for SmartStream Funds Control
- 7-12 Installing Cognos PowerPlay and Impromptu

Chapter 8 Installing SmartStream Products on the Client Workstations

- 8-1 Before You Begin
- 8-2 About the SmartStream Client Workstation Setup Program
- 8-4 Setting Up Profiles
- 8-5 How the Setup Program Uses Profiles
- 8-6 Running the Setup Program
- 8-8 Running SmartStream Client Workstation Setup Remotely
- 8-9 Post-Installation Tasks for SmartStream Budget
- 8-12 Post-Installation Task for the SmartStream Reference Tool
- 8-13 Post-Installation Task for SmartStream Projects
- 8-14 Uninstalling SmartStream Software from a Client Workstation
- 8-15 Considerations for Upgrading SmartStream Client Workstations

(continued)

Chapter 8*(continued)*

- 8-20 Installing SmartStream Builder on the Client Workstation
- 8-22 Considerations for Using Microsoft Terminal Services (MTS)

Chapter 9 Installing the SmartStream Mail Gateway

- 9-1 Before You Begin
- 9-2 About the SmartStream Mail Gateway Setup Program
- 9-3 Prerequisite Tasks
- 9-5 Installing the SmartStream Mail Gateway
- 9-6 Logging On to the SmartStream Mail Gateway
- 9-7 Uninstalling the Mail Gateway

Chapter 10 Installing Job Server

- 10-1 Before You Begin
- 10-2 Establishing a Connection in the SmartStream Environment
- 10-3 About the Job Server Setup Program
- 10-4 Setup Options for All Job Server Setup Programs
- 10-6 Installing Job Server in a UNIX Environment
- 10-8 Installing Job Server in a Windows Environment
- 10-9 Running Job Server Programs as Windows Services
- 10-10 Running Scheduled Payroll Processing Reports Using a SmartStream Poll Service
- 10-11 Post-Installation Tasks
- 10-12 Adding Job Server Programs Between Releases

Chapter 11 Installing SmartStream Connect

- 11-1 Before You Begin
- 11-2 Establishing a Connection
- 11-3 About the SmartStream Connect Setup Program
- 11-4 Installing SmartStream Connect in a Windows Environment
- 11-5 Troubleshooting

Chapter 12 Accessing SmartStream Product Documentation

- 12-1 About the SmartStream Product Documentation
- 12-2 Accessing the SmartStream Library through the Help Menu
- 12-5 Accessing Installation-Migration Documentation Through the Web

Chapter 13 After Completing the Setup Process

- 13-1 Verifying the Installation of SmartStream
- 13-3 SmartStream
- 13-6 SmartStream Shared Components
- 13-7 Allocations
- 13-8 Asset Management
- 13-9 Billing

(continued)

Chapter 13

(continued)

- 13-10 Budget
- 13-12 Consolidations
- 13-13 Funds Control
- 13-14 Human Capital Management
- 13-15 Ledger
- 13-16 Payables
- 13-18 Projects
- 13-19 Purchasing
- 13-20 Receivables
- 13-21 Receiving
- 13-22 Supplies Management
- 13-23 Before Going into Production
- 13-28 Implementing SmartStream
- 13-29 Updating Environment Information on the Infor Concierge

Chapter 14 Installation-Migration Checklists with Illustrated Procedures

- 14-1 About the Installation-Migration Checklists
- 14-3 Installation Checklist
- 14-9 Migration Checklist
- 14-16 Upgrade in Place Checklist
- 14-22 Setting Up the File Server
- 14-27 Preparing the Sybase Database Server
- 14-29 Creating and Loading Databases for SmartStream Products
- 14-38 Loading SmartStream Language Kits
- 14-42 Initializing Tables
- 14-46 Installing SmartStream Clients
- 14-49 Configuring Your User-Defined Accounting Key (UDAK)
- 14-56 Running the Migration Program
- 14-63 Running the Upgrade in Place Program
- 14-66 Loading Databases for Newly Licensed Products
- 14-70 Reloading SmartStream Language Kits
- 14-74 Processing the Architecture Tables in Special Mode
- 14-77 Regenerating the Runtime Library
- 14-83 Installing the Job Server
- 14-93 Installing SmartStream Connect
- 14-95 Installing the Mail Gateway
- 14-102 Setting Up ALLTAX and Payroll Regulatory Reporting
- 14-103 Configuring Master Scheduler, Poll, and ARPC
- 14-108 Performing Post-Installation Tasks

(continued)

Appendix A Utilities

- A-1 About the wjamit Utility
- A-2 Installation
- A-3 Calling Parameters
- A-4 Running the wjamit Utility

Appendix B Installation Worksheets

- B-1 File Server Installation Worksheet
- B-4 Database Server Installation Worksheets
- B-9 SmartStream Builder Database Server Installation Worksheet
- B-10 SmartStream Client Workstation Installation Worksheet
- B-12 SmartStream Mail Gateway Workstation Installation Worksheet
- B-13 SmartStream Job Server Installation Worksheet
- B-15 SmartStream Connect Installation Worksheet

Appendix C Minimum Sizing Requirements

- C-1 About Minimum Sizing Requirements
- C-2 Database Server
- C-5 Client Workstations

Introduction

The SmartStream® *Installation Guide* from Infor describes

- The installation process
- Information about installing SmartStream products.

Audience

Those who install SmartStream products are the intended audience for this guide.

Prerequisites

You must be familiar with the Infor Concierge where you can

- Review product documentation
- Search for Knowledge Base articles
- Submit incidents
- Network with other SmartStream customers.

You must also be familiar with the supported version of following products to install SmartStream products:

- Microsoft SQL Server or Sybase Adaptive Server Enterprise
- Microsoft SQL Server Client or Sybase PC Client
- Windows Workstation
- SmartStream products
- UNIX or Windows Server
- Your mail software product

Conventions

A check box () next to text identifies a task you need to complete during the installation process.

1 Overview of Installing SmartStream

Chapter Contents

| | |
|-----|-----------------------------|
| 1-1 | The SmartStream Environment |
| 1-3 | The Installation Process |
| 1-4 | Planning Your Installation |

The SmartStream Environment

This section describes the components required in the SmartStream environment.

Installation Workstation

The installation workstation is set up to install SmartStream and other required third-party products. It must have a network connection to the other components that make up the SmartStream environment. If you are installing from compact discs delivered by Infor, the installation workstation must also have a CD-ROM player.

File Server

The file server is installed with all the SmartStream products and third-party products packaged on the compact discs delivered by Infor or in installation .zip files available for downloading from the Infor Concierge.

Database Server

The database server is installed with Sybase Adaptive Server Enterprise or Microsoft SQL Server and SmartStream

- Product databases
- Tables
- Views
- Initial data
- Stored procedures
- Triggers.

SmartStream Client Workstation

The SmartStream client workstations are installed with the necessary third-party products and SmartStream.

SmartStream Mail Gateway Workstation

The SmartStream Mail Gateway workstation, a connection for electronic mail, sends mail messages containing job run results or workflow related activities, or both.

Job Server

Job Server provides the capability of running remote unattended processes. Job Server is made up of these programs:

- Master Scheduler
- Poll
- ARPC

Additional SmartStream Products

If an enterprise licenses SmartStream Connect or SmartStream Builder, the SmartStream environment contains the following additional components.

SmartStream Connect Your enterprise can use SmartStream Connect to support a mix of host and client/server products. SmartStream Connect downloads, uploads, or downloads and uploads data from the host to the SmartStream client/server environment.

SmartStream Builder Your enterprise can use SmartStream Builder development software to enhance SmartStream and adapt SmartStream products to your needs.

SmartStream Builder is installed on the

- File server
- Database server
- SmartStream client workstations (usually a developer's workstation).

Additional SmartStream Functions

Your enterprise can implement the following SmartStream functions. The use of these functions affects the way SmartStream is installed at your enterprise.

Language Kits SmartStream client workstations are monolingual; that is, they are installed with SmartStream in one of the languages installed on the file server and database server. However, SmartStream supports installations of multiple languages on the file server and database server.

The Installation Process

The SmartStream installation process involves several tasks and varies depending on the products and functionality you are installing.

Installation Medium

SmartStream can be installed from a physical compact disc or a compact disc image downloaded from the Infor Concierge. Throughout this guide, *SmartStream CD* will refer to either medium.

Installing SmartStream the First Time

If you are installing SmartStream for the first time, the standard installation process includes these tasks:

| Task | Description | Documentation |
|------|---|--|
| 1 | Prepare the environment by installing the required third-party software | This guide, Chapter 2, Preparing the Environment |
| 2 | Copy the files from the SmartStream CD to your file server | This guide, Chapter 3, Preparing and Installing the File Server |
| 3 | Create your databases and load databases without data | This guide, Chapter 6, Installing SmartStream Products on the Database Server |
| 4 | Install client workstations | This guide, Chapter 8, Installing SmartStream Products on the Client Workstation |
| 5 | Install the Mail Gateway | This guide, Chapter 9, Installing the SmartStream Mail Gateway |
| 6 | Install the Job Server | This guide, Chapter 10, Installing Job Server |
| 7 | Complete post installation tasks. | This guide, Chapter 13, After Completing the Setup Process |

Installing a New Release of SmartStream

Checklists of the tasks required to install a new release are included in this guide in Chapter 14, Installation-Migration Checklists with Illustrated Procedures.

This chapter also contains detailed procedures with pictures of the corresponding installation and migration windows that you can use to supplement the information in the other chapters of this guide.

Planning Your Installation

Because the installation process involves several steps and varies depending on the products and functionality you are installing, take the time to plan your installation tasks.

SmartStream Installation Worksheets

The SmartStream Installation worksheets are provided to help you plan your SmartStream installation and record information about your environment.

A worksheet is provided for each SmartStream setup program. Complete the appropriate worksheets before you begin the installation process to help make it run smoothly.

The SmartStream Installation worksheets are in Appendix B of this guide.

2 Preparing the Environment

Chapter Contents

| | |
|-----|---|
| 2-1 | Accessing the Latest Installation Information |
| 2-3 | Client Configuration for Installing International Version |
| 2-4 | Preparing the Installation Workstation |
| 2-5 | Establishing Connectivity in the SmartStream Environment |
| 2-6 | Installing Sybase PC Client and ODBC Drivers |
| 2-9 | Installing Microsoft SQL Server Client and ODBC Drivers |

Accessing the Latest Installation Information

The Infor Concierge contains the latest SmartStream installation information. Before starting the installation process, visit the Infor Knowledge Base. Carefully review the following topics:

- *Release number* **Critical Issues** for the latest installation information for the version of SmartStream that you are installing.
- *Release number* **Supported Technical Environments** for the latest SmartStream hardware and software requirements for
 - Database servers
 - Job server and Connect server
 - File server
 - Installation workstation
 - Client workstations
 - Electronic mail interoperability
 - Third-party software
 - Host.

For information about accessing the Infor Concierge, see the *SmartStream Release Introduction* document included in your SmartStream package.

Infor Concierge User ID and Password

If you are accessing the Infor Concierge for the first time, verify that you have a user ID and password. If not, contact SmartStream Customer Support.

Client Configuration for Installing International Version

If you are installing an international version of SmartStream, you must set up the following options on the server and the workstation on which you plan to install language kits **before** installing the SmartStream language kit.

- Automatic ANSI to OEM, turn Off
- Use International Settings, turn On

If you do not set up these options before the installation, you have to reinstall the language kit.

These options must also be set up on each SmartStream client.

Default Locale

English (United States) is the required default locale for a database server using Microsoft SQL Server and the installation workstation. To change the default locale, follow instructions in the Windows Help for default locale.

Using any other setting results in multiple date-time conversions when you run the SmartStream migration process on a database server using Microsoft SQL Server.

Preparing the Installation Workstation

Perform the following tasks to prepare the installation workstation for the installation process.

CD-ROM player

SmartStream can be installed from a physical compact disc or a compact disc image downloaded from the Infor Concierge.

If you plan to install SmartStream from a compact disc, for optimal performance, attach a CD-ROM player to the installation workstation instead of using a remote connection.

Date Format

The four-digit year format is the required date format. To change the year format on the installation workstation, follow instructions in the Windows Help for regional settings.

Service Packs

Because you will also use the installation workstation to apply SmartStream service packs, be sure that the installation workstation maps to the same drives as those used during the original installation. The original drive mapping information is recorded in the `dbinst.ini` file. This file resides on the file server in the directory where SmartStream is installed and is used to apply service packs.

Establishing Connectivity in the SmartStream Environment

SmartStream uses both the Client software and ODBC drivers appropriate for your database management system to connect from database client workstations to the server. Database connectivity is required for workstations that are used to

- Install SmartStream onto database servers
- Run as Job Servers
- Run the SmartStream application.

Install the following software in the SmartStream environment to provide database connectivity:

- Sybase Software Developer's Kit (SDK) or Microsoft SQL Server Client
- Sybase ODBC Drivers or Microsoft ODBC Drivers

| For this environment... | Install... | On the... |
|-----------------------------------|-----------------------------|---|
| Sybase Adaptive Server Enterprise | PC Client | <ul style="list-style-type: none"> ▪ Installation workstation ▪ Client workstation ▪ Job Server workstation. |
| | Sybase ODBC Drivers | <ul style="list-style-type: none"> ▪ Client workstation ▪ Job Server workstation. |
| Microsoft SQL Server | Microsoft SQL Server Client | <ul style="list-style-type: none"> ▪ Installation workstation ▪ Client workstation ▪ Job Server workstation. |
| | Microsoft ODBC Drivers | <ul style="list-style-type: none"> ▪ Installation workstation ▪ Client workstation ▪ Job Server workstation ▪ Mail Gateway workstation. |

See the following sections for detailed information about installing these products in the SmartStream environment.

Installing Sybase PC Client and ODBC Drivers

Sybase PC Client software must be installed in SmartStream environments using Sybase Adaptive Server Enterprise. See the **Supported Technical Environments** for your release for the correct version of third party tools. Install this program on the

- Installation workstation
- SmartStream client workstations
- Windows Job Server workstation.

SmartStream Recommendations

Consider these recommendations when you make decisions during the installation process:

Components

The following components are required:

- Connectivity
- Sybase ASE ODBC
- Net-Library Drivers

Net-Library Drivers

The following net-library drivers are supported:

- Windows Sockets
- Named Pipes

Optionally, you can install the following components:

- Sybase Central
- Language Modules
- Sybase ASE OLE DB

Long File Names

The SmartStream environment does not support long file names.

Warning: For the destination directory and its subdirectories, **do not**

- Use long names
- Embed spaces or periods in the names.

Installation Instructions

- Review the Sybase documentation **carefully** before starting the PC Client installation.

Running the Setup Program

Run the autorun.exe program on the Sybase PC Client CD if you are installing the

- SmartStream client workstation
- Windows Job server.

For information about running the autorun.exe, see the appropriate Sybase documentation.

Configure and Test Sybase PC Client

Perform these tasks after installing Sybase PC Client software.

For Non-English Versions of Microsoft Windows

- If you install the PC Client software on a workstation installed with a non-English version of Microsoft Windows, define the following Environment Variable to your system using the System utility on the Control Panel:

LANG=en

Testing PC Client Connection to the Database Server

- Complete the following steps to test the PC Client connection between the Windows workstation and the database server:

| Step | Action |
|------|---|
| 1 | From the Sybase Program group, run the dsedit utility. |
| 2 | Click OK on the Select Directory Service window. |
| 3 | On the Server Object menu, click Add , enter the server name, and click OK. |
| 4 | Select the server name you just added. Then on the Server Object menu, click Modify Attributes . |
| 5 | Click Add , enter the connection information for the server, and click OK. Note: Ensure that TCP is selected as the protocol. |
| 6 | Select the server name you just added. Then on the Server Object menu, click Ping Server . Result: If a message appears stating that your server is alive, the workstation is connected to the database server. |

Sybase ODBC Drivers

SmartStream requires that you select the Sybase System ODBC driver to connect to SmartStream 8.0 Sybase data sources.

Configure and Test Sybase ODBC Drivers

Complete the following steps to configure the Sybase ODBC drivers and test the ODBC connection between the Windows workstation and the database server:

| Step | Action |
|------|---|
| 1 | Open the 32-bit Data Sources (ODBC) utility. Note: This is the name and path of the 32-bit utility: %WINDIR%\SysWOW64\odbcadm32.exe |
| 2 | Add a System DSN for your server and select the Adaptive Server Enterprise driver. |
| 3 | On the General tab, enter the following information: <ul style="list-style-type: none"> ▪ Data source name ▪ Description ▪ Server name (ASE Host Name) ▪ Server port |
| 4 | Click Apply to apply the settings. |
| 5 | Click Test Connection , enter a valid ID and password, and click OK. Result: If a message appears stating that the connection is established, the workstation is connected to the database server. |

Troubleshooting

This table lists some possible causes and solutions if your workstation fails to connect after you install PC Client software.

| Problem | Possible Resolutions |
|---|---|
| The client workstation did not connect, or errors occurred while using FTP PC/TCP 32 software. | Run dsedit to ensure you are using the nlwnsck.dll, not the nlfptc.dll, in the configuration of your server entry. |
| The database server did not connect. If the database server cannot connect, the settings in the sql.ini file might be wrong. | Check the entries in the sql.ini file to ensure they are appropriate. Either run dsedit to check this, or edit this file manually. This file is in the x:\sybase\in\sql.ini directory, where x:\sybase is the directory where you installed PC Client software. |
| You cannot log on to SmartStream using a Windows workstation, but you can connect to the server. | Ensure that you have the 32-bit version of PC Client software installed on your client workstation. |

Installing Microsoft SQL Server Client and ODBC Drivers

Microsoft SQL Server Client software must be installed in SmartStream environments using Microsoft SQL Server. It should be installed on the

- Installation workstation
- SmartStream client workstations
- Job Server workstation
- Mail Gateway workstation.

SmartStream Recommendations

- Accept all defaults when you install Microsoft SQL Server Client software.

Installation Instructions

For information about installing Microsoft SQL Server Client software, see the appropriate Microsoft documentation.

Configure and Test the Microsoft SQL Server Client

After installing Microsoft SQL Server Client software, complete the following steps to configure it and test the connection between the client workstation and the database server.

| Step | Action |
|------|--|
| 1 | From the Microsoft SQL Server program group, run SQL Server Configuration Manager. |
| 2 | Ensure that TCP/IP is an enabled protocol. |
| 3 | Create a 32-bit alias. |
| 4 | Select the TCP/IP network library, enter the server alias and connection parameters, and click OK. |
| 5 | Test connectivity to the server by going to the Microsoft SQL Server program group, running SQL Server Management Studio, and connecting to the server using the alias you just added. |

Microsoft Windows ODBC Drivers

Microsoft Windows ODBC Drivers software must be installed in SmartStream environments using Microsoft SQL Server. It should be installed on the

- Installation workstation
- SmartStream client workstations
- Job Server workstation

Installation Instructions

For information about installing Microsoft Windows ODBC Drivers software, see the Microsoft SQL Server *Setup* guide.

Configuring and Testing the ODBC Drivers

Perform these tasks after installing Microsoft ODBC drivers software:

- You must add an ODBC data source for your database server on the workstation where ODBC is installed.
- Verify that you added the data source correctly using the Data Sources (ODBC) utility.

| Step | Action |
|------|---|
| 1 | Open the 32-bit Data Sources (ODBC) utility. Note: This is the name and path of the 32-bit utility: %WINDIR%\SysWOW64\odbcadm32.exe |
| 2 | Add a System DSN for your server and select the appropriate SQL Server driver. See the Supported Technical Environments for your release for the correct version of third party tools. Result: The Create New Data Source wizard is displayed. |
| 3 | Enter the following information and click Next : <ul style="list-style-type: none"> ▪ Data source name ▪ Description ▪ Server name |
| 4 | Enter authentication information and click Next . |
| 5 | Click Apply to apply the settings. |
| 6 | Click Test Data Source , enter a valid ID and password, and click OK. Result: If a message appears stating that the test completed successfully, the workstation is connected to the database server. |

3 Preparing and Installing the File Server

Chapter Contents

- 3-1 Before You Begin
 - 3-2 About the File Server Setup Program
 - 3-3 Considerations for SmartStream Language Kits
 - 3-4 Prerequisite Tasks
 - 3-6 Running the File Server Setup Program
 - 3-10 Troubleshooting
 - 3-13 Post-Installation Task for SmartStream
 - 3-14 Post-Installation Task for Language Kits
-

Before You Begin

Before preparing and installing the file server, complete the tasks in Chapter 2, *Preparing the Environment*.

Worksheets

Installation worksheets are provided to help you plan your SmartStream installation. See the *File Server Installation Worksheet* in Appendix B.

About the File Server Setup Program

The File Server Setup program installs the

- SmartStream products your enterprise licensed in a directory on the file server
- SmartStream products required to run the products you licensed
- English language components in the same directory as the SmartStream products for all the SmartStream products selected
- SmartStream language kits, if selected
- Utilities
- SmartStream Builder, if selected
- SmartStream Builder language kits, if selected.

Location of the File Server Setup Program

The File Server Setup program can be found on any SmartStream compact disc or compact disc image downloaded from the Infor Concierge. Throughout this guide, *SmartStream CD* will refer to either medium.

Number of SmartStream Environments

You can install one copy of SmartStream on the file server and set up multiple database environments from it. Each environment set up from the same file server source must use the same accounting key.

If you create only one SmartStream environment from the SmartStream copy on the file server, the remaining installation, configuration, and migration programs do not prompt for the name of the environment you are working in. If you create multiple environments, however, these programs prompt for the name of the environment you are working in before they begin processing.

When you create multiple environments, configuration information for the first environment is stored in `\instenv\env0\env.ini` on the SmartStream file server. Information for the second environment is stored in `\instenv\env1\env.ini`, and so on. Output files from the various installation, configuration, and migration programs are stored under `\instenv\envx\installationstep\`.

If an environment is no longer used, deleting the associated `instenv\envx` directory with all its subdirectories effectively erases the environment.

Considerations for SmartStream Language Kits

Each SmartStream language kit is delivered on a separate compact disc or compact disc image downloaded from the Infor Concierge that contains a copy of the File Server Setup program.

Directory Structure

The SmartStream File Server Setup program installs the language components into a separate directory from the SmartStream file server directory. Each language kit must be installed in a separate directory.

Process

Run the File Server Setup program once to install SmartStream products, and again for each language kit.

| Run File Server Setup from this compact disc... | To install this component on the file server... | In this directory... |
|--|--|--|
| SmartStream | SmartStream products | A directory you specify. |
| Language kit | Language components | A different directory from where you installed SmartStream and any other language kit. |

Prerequisite Tasks

Complete these tasks before installing SmartStream products on the file server.

- ❑ Your user ID must have administrative privileges for the installation workstation. These privileges allow you to use the File Server Setup program to register and unregister .dll and .ocx files.
- ❑ Ensure that you have enough space on the file server to copy the products that your enterprise licensed. The File Server Setup program calculates space requirements for you based on the products selected.

License Disk

With the addition of License Management software, both the license disk and the installation .zip file downloaded from the Infor Concierge contain two license files. One license file has an extension of **.lic**, and the other has an extension of **.luk**.

The **.lic** file contains a list of the products your company has licensed and controls the products that are available for selection during file server setup. When your company licenses more products, you will need a new .lic license file to install these products.

The **.luk** file is used after SmartStream Client Workstation Setup to load your product license usage key (PLUK) information. For more information, see the License Management Software chapter of the *SmartStream Administration* guide.

If you cannot find the license disk or files, open an incident to request a new one using the Infor Xtrem portal.

SmartStream Installation from CDs

If you are installing SmartStream from compact discs, complete these steps:

- ❑ For optimal performance, attach a CD-ROM player to the installation workstation instead of using a remote connection.
- ❑ Insert the SmartStream compact disc in the CD-ROM player.
- ❑ Find the license file on the network share.

Note: Use the license file with the **.lic** extension during file server setup.

SmartStream Installation from Installation .zip Files

If you are installing SmartStream from installation .zip files downloaded from the Infor Xtrem portal, complete these steps:

- Download the installation .zip files from the Infor Concierge.
- Extract the files in the installation .zip file onto a network share.
- Find the license file on the network share.

Note: Use the license file with the **.lic** extension during file server setup.

Running the File Server Setup Program

Complete this procedure for each of the following products, if licensed, to install them on the file server:

- SmartStream products
- SmartStream Builder
- Language kits

| Step | Action |
|------|---|
| 1 | Insert the compact disc in the CD drive and the license disk in a disk drive or find where SmartStream CD image was downloaded from the Infor Concierge. |
| 2 | Run the setup.exe program in this directory: <ul style="list-style-type: none">▪ For SmartStream and language kits, <i>CD-ROM drive:\dbs\instmgr\install</i>▪ For SmartStream Builder, <i>CD-ROM drive:\strmbldr\instmgr\install</i> where <i>CD-ROM drive:\</i> is the location where either <ul style="list-style-type: none">▪ The SmartStream compact disc is inserted▪ The SmartStream CD image was downloaded from the Infor Concierge. |

Note: If UAC is turned on, you must right-click setup.exe and select Run as administrator.

Illustrated Procedure

To see a procedure for this task with pictures of the appropriate installation windows, go to [Setting Up the File Server](#) in Chapter 14, Installation-Migration Checklists with Illustrated Procedures.

Results of Running the Setup Program

The Setup program performs the following tasks:

- Copies SmartStream products to the file server and establishes the SmartStream directory structure.
- Generates a file called *dbsinst.ini*, which contains a record of how you responded during the setup process. The *dbsinst.ini* file is located in the *drive:\directory* where SmartStream is installed on the file server.

The settings in the *dbsinst.ini* file allow subsequent installations to be performed.

- Generates a file called *copy.log*, which contains a record of all files copied or unzipped.

Products Copied to the File Server

The following products are copied to the file server from the SmartStream CD when you run the Setup program. They are listed in the dbsinst.ini file along with your setup responses.

| Short Name in dbsinst.ini | Name Displayed in SmartStream |
|---------------------------|-------------------------------|
| PLATFORM | SmartStream |
| COMMON | Shared Components |
| LEDGER | Ledger |
| ASSETS | Asset Management |
| CONSOLID | Consolidations |
| ALLOCATE | Allocations |
| BILLING | Billing |
| BUDGET | Budget |
| PAYABLES | Payables |
| RECEIVBL | Receivables |
| UOMM | Unit of Measure |
| PROJECTS | Projects |
| PCOMMON | Procurement Common |
| ITEMS | Items |
| RECEIVING | Receiving |
| BACKLOAD | Background Load |
| COST | Supplies Management Cost |
| INVENTORY | Supplies Management |
| PURCHASE | Purchasing |
| PERSONEL | Personnel |
| BENEFITS | Benefits |
| PAYROLL | Payroll |
| CONNECT | Connect |
| EURO | Euro |
| FUNDS | Funds |
| STRMBLDR | SmartStream Builder |
| OPNAZER | Open Analyzer |

Setup Options for SmartStream Products and SmartStream Builder

Installation Type The type of installation you want the File Server Setup process to perform.

| If you select... | The File Server Setup process installs... |
|------------------|---|
| Quick | All the products your enterprise licensed. |
| Custom | Only those products you select from the list of products that your enterprise licensed. |

Location of the License File The drive and path on the network share where you downloaded the license file. Include the name of the license file in this field.

The SmartStream license file is used to install SmartStream products from the SmartStream CD.

You will receive a new license file from Distribution Services for SmartStream 8.0. Previous license files are rejected.

Source Directory The drive and path where you inserted the SmartStream CD, or downloaded the SmartStream CD image from the Infor Concierge, containing the SmartStream products and components that you want to install.

Operating System Choose the operating system of the server where SmartStream Job Server will be installed.

Destination Directory The drive and path where the file server image will be created.

Warning: For the destination directory and its subdirectories, **do not**

- Use long names
- Embed spaces or periods in the names.

If you are installing language kits, see the following section for more information about the destination directory.

Setup Options for Installing Language Kits

The following setup options are specific to installing language kits on your file server.

Destination Directory

The drive and path where the base file server image is created for the language kit that you are installing.

For example, c:\dbs_fr for installing a French language kit.

English Install Directory

The drive and path where the English installation process looks for the SmartStream products and components that you want to install.

Troubleshooting

Several files that the File Server Setup program uses can be helpful for resolving problems:

| File | Description |
|-------------|---|
| Copy.log | This file is created by the File Server Setup program in the root directory of your SmartStream file server image. It contains a log of all the files copied during the program's execution. It also contains a log entry when .zip files are extracted. File copy errors that occur during program execution are also logged here. |
| Dbsinst.err | This file is also created by the File Server Setup program in the root directory of your SmartStream file server image. It contains a summary of all the file copy errors that occurred during the program's execution. (The same information is also located in the copy.log file.) |
| Manifest | This file contains a record of all files placed on the CD when it was created. The manifest file is in the manifest directory on the CD and has a pseudo-random name, like 85000000.nx1. Each line in the manifest file contains the following entries: the filespec on the SmartStream development server, the filespec on the CD, the filespec on an installed file server, the name of the .zip archive on the CD, if any, the original size of the file, and the date and time stamp of the file. |
| .pkg files | These files control the File Server Setup program file delivery process. They reside in the dbs\instmgr\package directory on the CD. Each file contains a number of sections, similar to an .ini file. These sections describe the source directory of the files on the SmartStream development server, the destination of the files on an installed file server, and the .zip archive to use, if any. |
| Dbsinst.ini | This file is created by the File Server Setup program in the root directory of your SmartStream file server image. The [COPY] section of this file contains a record of the components already loaded on the file server. If a component has previously been loaded, the File Server Setup program does not load it again. |

This table shows possible problems and the suggested solutions:

| Problem | Possible Solutions |
|---|--|
| The dbsinst.err file contains a message indicating that there is not enough space to install software on the file server. | <ul style="list-style-type: none"> ▪ Increase space by deleting unnecessary files, directories, or programs. ▪ Correct the problem, and start the File Server Setup program again. |
| The dbsinst.err file contains this message: Unable to copy file. | Verify that you have network operating system write permission for the file server drive. |
| The File Server Setup program encounters a copy error. | A message is written to the dbsinst.err file that contains error information. Review the error file, correct the problem, and restart the installation process. |
| During the installation process, the installation workstation locks. | <ul style="list-style-type: none"> ▪ Reboot the installation workstation, and try running the File Server Setup program again. ▪ Verify that the installation workstation is prepared correctly. |
| The client workstation you use to install software runs out of memory during the installation process. | Close any unneeded Microsoft Windows programs you are running, such as screen savers and mail products. Reboot and start the File Server Setup program again. |
| A message is displayed indicating an illegal action was attempted. | Check all source and destination connections to ensure they are still available. |
| A message is displayed indicating that <ul style="list-style-type: none"> ▪ The File Server Setup program is unable to find a file. ▪ Files being registered or unregistered are not available. | Determine if the file is registered, and ensure that the location of the registered file is valid. If it is not valid, delete the registry entry. |
| This message is displayed: Unable to register file. | Take the following actions: <ul style="list-style-type: none"> ▪ Determine if the file is already registered. If it is registered, unregister it and manually register the required version using the regsvr32.exe program. The SmartStream version of the file resides in the \dbs\instmgr\install directory. ▪ Ensure the logon ID has administrator's privileges to the install workstation. ▪ Determine if the registration software is in the search path or in the \system directory. |
| One of these messages is displayed: Could not register all necessary files. Check files specified in cdshell.ini against the registry. Exiting setup program. | Determine if any of the files in the cdshell.ini file are already registered in the installation workstation. |

| Problem | Possible Solutions |
|---|--|
| <p>This message is displayed: Could not find location of filename when checking for version.</p> | <p>The filename is found in the registry, but the File Server Setup program is unable to find it on the installation workstation. Unregister the program or make the registry entry valid.</p> |
| <p>This message is displayed: Could not find location of filename when trying to register file.</p> | <p>The File Server Setup program is verifying that a file is found before registering it. Check that the file named is in the specified directory. The default directory is the location of the File Server Setup program.</p> |
| <p>This message is displayed: Unable to load <i>location of filename</i> or Attempt to register <i>location of filename</i> failed.</p> | <p>The File Server Setup program cannot register the file specified. Ensure that you have administrator privileges to the installation workstation. Manually register this file on the installation workstation.</p> |
| <p>One of these messages is displayed: Unable to load <i>location of filename</i> when attempting to unregister file. Attempt to unregister <i>location of filename</i> failed.</p> | <p>The File Server Setup program cannot unregister the file specified. Manually unregister this file on the installation workstation.</p> |
| <p>This message is displayed: User <i>userid</i> is not an administrator on this local machine.</p> | <p>Log on to the installation workstation with a user ID that has administrator privileges.</p> |
| <p>This message is displayed: Couldn't lock file.</p> | <p>Exit the File Server Setup program. Remove the License disk and unlock it. Reinsert the License disk and start the File Server Setup program.</p> |

Post-Installation Task for SmartStream

SmartStream provides the ability to maintain an audit of users attempting to log on to SmartStream.

Whether you choose to audit logon attempts for your organization or not, the audit user ID and password **must be correctly configured** to access the database to determine the logon auditing option.

Configuring the Audit User ID and Password

The pltaudt.exe program automatically configures the audit user ID and password in the [Security Audit] section of the dbserver.ini file.

To configure the dbserver.ini file using pltaudt.exe, complete this procedure:

| Step | Action |
|------|--|
| 1 | Double-click the pltaudt.exe file in the \ss directory on the SmartStream file server. Result: The Update DBSERVER.INI for Audit Logon ID and Password dialog box appears. |
| 2 | Select the dbserver.ini file you want to update using the Browse button. Note: The default is the dbserver.ini file in the \ss directory on the SmartStream file server. |
| 3 | Enter the audit user ID and password. |
| 4 | Click Update . Result: The audit user ID and password are encrypted and inserted into the dbserver.ini file. |
| 5 | Click Exit to exit the program. |

Security Requirements At a minimum, the audit user ID must be added to the database server syslogins table. No additional security privileges are required. Adding the audit user ID as a SmartStream user ID is optional.

More Information For more information about logon audits, see Security Auditing in the Users and Security chapter of the *SmartStream Administration* guide.

Post-Installation Task for Language Kits

If you installed language kits on the file server, perform the following tasks.

SmartStream Builder Language Kits

Complete this procedure for the SmartStream Builder language kits.

| Step | Action |
|------|--|
| 1 | Copy the contents of the CD to <i>drive:\language directory\STRMBLDR</i> |
| 2 | Turn read-only attributes Off. |

Applying Service Packs

If a service pack was applied before the installation of a language kit, the service pack needs to be reapplied using the FSO (file server only) option.

4 Preparing the Sybase Database Server

Chapter Contents

| | |
|-----|---|
| 4-1 | Before You Begin |
| 4-2 | About Preparing the Database Server |
| 4-3 | Considerations for Installing Sybase Adaptive Server Enterprise |
| 4-5 | Using the dbsprep Program |

Before You Begin

Before preparing the database server, you must complete the tasks in these chapters:

- Chapter 2, Preparing the Environment
- Chapter 3, Preparing and Installing the File Server

About Preparing the Database Server

Before installing SmartStream on a database server, you must prepare the database server by performing these tasks:

- Install Sybase Adaptive Server Enterprise
- Run the dbsprep program

Considerations for Installing Sybase Adaptive Server Enterprise

Consider the following recommendations when you make decisions during and after the installation of Sybase Adaptive Server Enterprise:

For more information about installing Sybase Adaptive Server Enterprise, see the appropriate Sybase documentation.

Specifying Defaults for Installation

- Specify the following character set as the default:

| If your operating system is... | Then use the default... |
|---------------------------------------|----------------------------------|
| HP-UX (English only) | HP Proprietary (roman 8) - UNIX. |
| HP-UX (Multilingual) | iso_1. |
| Windows (English only) | CP 850. |
| Windows (Multilingual) | iso_1. |
| Any other | iso_1. |

- Specify the following character set conversion as the default:

| If your operating system is... | Then use the default... |
|---------------------------------------|--------------------------------|
| All (English only) | 0. |
| All (Multilingual) | 1. |

SmartStream products test for this specification.

- Select Binary as the default sort order. Your database server entries become case sensitive.

SmartStream requires that the Sybase server be installed with Two-Phase Commit to prevent errors with stored procedures.

- Install Sybase with Two-Phase Commit.

Sizing the Master Database

- Change the size of the master database to a minimum of 120 megabytes (MB).

Sizing the tempdb Database

- Initially set the size of the tempdb database at 100 MB. This database is a work area available to all database server transactions for temporary storage. The size of tempdb depends on many factors such as the size of scheduled jobs (batch). After testing, you might need to increase the size.

When you extend the size of tempdb database, extend it to a device other than the master device.

See the appropriate *Sybase System Administration Guide* for information about creating and using devices.

Allocating Disk Devices

- Use the disk init command to allocate disk devices to store the databases for each product. This task reserves disk space on the database server for the databases.

To simplify the installation process for non-production systems, you can create one device for databases and one device for database logs. Depending on the needs of your enterprise, you can allocate more space for any of these databases, up to the amount available on the devices after installation is complete. For better performance, production systems should use as many devices as possible that are distributed across physical devices.

For the minimum space requirements for each SmartStream component that creates and sizes a database, see Appendix C, Minimum Sizing Requirements.

Product Family

A product family is a group of SmartStream products and components required to run the SmartStream products.

When calculating space requirements, be sure to include the entire product family you are installing.

Example

If you license Asset Management, you must also plan space for SmartStream, Shared Components, and Ledger databases and logs.

Using the dbsprep Program

The dbsprep program adjusts the following parameters if they are less than the minimum setting listed. These minimum settings are required to install SmartStream and SmartStream products only. If you want to adjust these parameters for your production environment, see the appropriate Sybase Adaptive Server Enterprise documentation.

| Parameter | Minimum Setting |
|-----------------------------------|------------------------|
| Max memory | 204800 |
| Open databases | 120 |
| Open objects | 10000 |
| Procedure cache size | 10000 |
| Remote access | 1 |
| Stack size | 55296 |
| User connections | 100 |
| Recovery interval | 1 |
| TCP no delay | 1 |
| Open indexes | 5000 |
| Open partitions | 5000 |
| Identity burning set factor | 1 |
| Number of locks | 50000 |
| Disable character set conversions | 1 |
| Allow procedure grouping | 1 |

Depending on the amount of server memory allocated, the amount of procedure cache might need to be higher than the default required by Sybase Adaptive Server Enterprise.

Running the dbsprep Program

| Step | Action |
|------|--|
| 1 | Run the setup.exe program in this directory: <i>drive:\directory\utility\dbsprep\</i> where <i>drive:\directory</i> is the location where SmartStream is installed on the file server. |
| 2 | Enter your logon information for the server. |
| 3 | Run dbsprep for the database server in each of your SmartStream environments (for example, testing, training, production). |

Illustrated Procedure

To see a procedure for this task with pictures of the appropriate installation windows, go to [Preparing the Sybase Database Server](#) in Chapter 14, Installation-Migration Checklists with Illustrated Procedures.

Troubleshooting

The Database Preparation program uses a .dll version of WJAMIT called wjam.dll to perform database work. This file resides in the SmartStream file server image in the **\bin32\syb** directory. A subdirectory under the **\utility\dbsprep** directory is created for output files.

During the first phase of its execution, the Database Preparation program sets several configuration parameters in the database. It does this by using WJAMIT to process one of the following sections in the dbsprep.prf file:

- Sybase Windows: [CONFIGURE_FOR_SYBASE_NT]
- Sybase UNIX: [CONFIGURE_FOR_SYBASE_UNIX]

Two-Phase Commit

Although two-phase commit is an optional part of the Sybase installation, for SmartStream to run properly, you **must** install two-phase commit on the Sybase database server.

Installation

Use the installcommit script provided by Sybase to install two-phase commit.

Reinstallation

After applying a Sybase ESD or EBF, you must reinstall two-phase commit using the installcommit script delivered with the ESD or EBF.

5 Preparing the Microsoft Database Server

Chapter Contents

| | |
|-----|--|
| 5-1 | Before You Begin |
| 5-2 | About Preparing the Database Server |
| 5-3 | Considerations for Installing Microsoft SQL Server |

Before You Begin

Before preparing the database server, complete the tasks in these chapters:

- Chapter 2, Preparing the Environment
- Chapter 3, Preparing and Installing the File Server

About Preparing the Database Server

Before installing SmartStream on a database server, you must prepare the server by installing Microsoft SQL Server.

Special Consideration

Name The name you assign to the database server cannot contain dashes (-).

Configuration for Installing International Version

Default Locale English (United States) is the required default locale for a database server using Microsoft SQL Server and the installation workstation. To can change the default locale, follow instructions in the Windows Help for default locale.

Using any other setting results in multiple date-time conversions when you run the SmartStream migration process on a database server using Microsoft SQL Server.

Considerations for Installing Microsoft SQL Server

Consider the following recommendations as you make decisions during and after the installation of Microsoft SQL Server.

For information about installing Microsoft SQL Server, see the appropriate Microsoft SQL Server documentation and Help.

General Considerations

This information applies to the supported version of Microsoft SQL Server.

Specifying Defaults During Installation

- Select latin_1_general as the character set.
- Select Binary as the default sort order. Your database server entries become case sensitive.
- Select Mixed Mode.

Sizing the tempdb Database and Allocating Disk Devices

For the minimum space required for each SmartStream component that creates and sizes a database, see Appendix C, Minimum Sizing Requirements.

Product Family

A product family is a group of SmartStream products and components required to run the SmartStream products.

When you calculate space requirements, ensure that you include the entire product family that you are installing on the database server.

For example, if you license Asset Management, you must also plan space for SmartStream, Shared Components, and Ledger databases and logs.

6 Installing SmartStream Products on the Database Server

Chapter Contents

| | |
|------|---|
| 6-1 | Before You Begin |
| 6-2 | About the Database Server Setup Program |
| 6-3 | Setting Up Environments |
| 6-4 | Running the Setup Program |
| 6-8 | Loading SmartStream Language Kits |
| 6-9 | Troubleshooting |
| 6-11 | Installing SmartStream Builder on the Database Server |
| 6-13 | Adding SmartStream Products Between Releases |

Before You Begin

Before installing SmartStream products on the database server, you must complete the tasks in these chapters:

- Chapter 2, Preparing the Environment
- Chapter 3, Preparing and Installing the File Server
- Chapter 4, Preparing the Sybase Database Server, or Chapter 5, Preparing the Microsoft Database Server

Worksheets

Installation worksheets are provided to help you plan your SmartStream installation. See the Database Server Installation Worksheet in Appendix B. If you plan to install SmartStream Builder, see the SmartStream Builder Database Server Installation Worksheet as well.

About the Database Server Setup Program

The Database Server Setup program performs the following installations:

- Creates the SmartStream databases on a database server
- Creates or adds to an environment.
- Loads the databases with required initial data and optional education data
- Loads language components in the SmartStream databases

Setting Up Environments

For the database server setup process, an environment is a server that represents

- A logical business function for the customer, such as testing, training, or production
- A single installation of SmartStream.

Examples

New Environment

You set up a test environment on a database server. Now you are installing the database server for the production environment. This is a new environment.

Number of Environments

You can set up multiple environments using one SmartStream file server source.

Accounting Key

All of the environments created from the same file server source must use the same accounting key.

SmartStream and Other Database Products

Installing other applications on the database server with SmartStream is generally **not** recommended.

Because SmartStream requires a sort order of Binary, you cannot install an application that requires a sort order of Dictionary/Case-Insensitive (which is the default for Microsoft SQL Server) on the database server with SmartStream.

You can, however, install additional databases on the same server to be used for reporting purposes.

Running the Setup Program

Run the SmartStream Database Server Setup program on the installation workstation from the **\createld** directory on the SmartStream file server.

Creating Databases

| Step | Action |
|------|--|
| 1 | Run setup.exe from the \createld directory at the root of the file server image. Result: The Welcome to the SmartStream Database Create and Load Program window appears. |
| 2 | Click Next. Result: The SmartStream Environment window appears. |
| 3 | Select the environment to install products in and click Next: <ul style="list-style-type: none">▪ New environment, enter the description of the environment.▪ Existing environment, select the environment where you want to install additional products. Note: Database server names are case sensitive, and they must not contain dashes (-). Result: The Database Server window appears. |
| 4 | Enter information about the server where you want the databases created and click Next. Result: The Product Selection window appears. |
| 5 | Use the buttons to choose the products that you want to install and click Next. Result: The Database Location window appears. |
| 6 | Define the data location settings for the databases. <ul style="list-style-type: none">▪ For Sybase, enter the data device name for the Sybase database server.▪ For Microsoft SQL Server, enter the path on the server running Microsoft SQL Server to the directory where you want databases and log files created. Click Next. Result: The Database Details window appears. |
| 7 | Change the default database and log sizes and click Next, or click Next to accept the defaults. Note: The default for the database and log sizes is 0. Result: The Database Create Summary window appears. |

| Step | Action |
|------|--|
| 8 | <p>Review the selections you made.</p> <ul style="list-style-type: none"> ▪ To make changes, click Back. ▪ To finish the setup process, click Next. <p>Result: The setup program begins creating databases, and loading data if requested.</p> <p>If errors occur during processing, the Database Error Review window appears where you can</p> <ul style="list-style-type: none"> ▪ Correct errors using the list of files and the Edit button. Then click Retry. ▪ Click Cancel to end the process without making the requested changes. <p>If no errors occur, the Database Operations window appears.</p> |
| 9 | Click Exit and go to the Loading Databases procedures. |

Named Instance Considerations

If you are installing a named instance, restart the SQL Server service before loading the databases so that the server name references are updated correctly (the results of the `sp_dropserver` and `sp_addserver` commands are reflected in the contents of the `@servername` variable).

Loading Databases

Use this process for loading databases.

Prerequisite for Microsoft SQL Server

Before you can load data into the databases you created earlier, you must run the DBtool configurations utility using this procedure:

| Step | Action |
|------|--|
| 1 | <p>Run <code>dbtool.exe</code> from the <code>\DBMS</code> directory at the root of the file server image.</p> <p>Result: The SmartStream DB Tool 1.0 window appears.</p> |
| 2 | In the Environment area, choose your SmartStream environment from the drop-down list. |
| 3 | In the Database Server area, enter the sa ID and password. |
| 4 | <p>From the drop-down list in the Operation area, choose the option appropriate for your database installation, where <i>version</i> is your version of Microsoft SQL Server:</p> <ul style="list-style-type: none"> ▪ Microsoft SQL Server <i>version</i> - Install Default Instance ▪ Microsoft SQL Server <i>version</i> - Install Named Instance |
| 5 | <p>Click Process.</p> <p>Result: The settings needed for SmartStream are set up on the Microsoft SQL Server database server.</p> |

| Step | Action |
|------|--|
| 6 | Click OK on the DB Tool Success Report window. |
| 7 | Click Exit. |

Loading Databases Procedure

To load data into the databases, complete this procedure:

| Step | Action |
|------|---|
| 1 | Run setup.exe from the \createld directory at the root of the file server image. Result: The Database Create/Load Step window appears. |
| 2 | Select Load databases with data and click Next. Result: The Database Server window appears. |
| 3 | Enter login information for the server where the databases were created and click Next. Result: The Product Selection window appears. |
| 4 | Use the buttons to choose the products whose data you want to load and click Next. Result: The Education Data window appears. |
| 5 | Determine whether you want to load both required and sample data or required data only and click Next. Note: You can load sample data only if you did not tailor your accounting key. If you chose to load sample data on the Education Data window, before you can tailor your accounting key and load production data, you must run the table initialization program to remove the sample data. Result: The Database Load Summary window appears. |
| 6 | Review the selections you made. If you need to make changes, click Back. If you want to continue, click Next then Finish. Result: The setup program begins loading data. If errors occur during processing , the Database Error Review window appears where you can <ul style="list-style-type: none">▪ Correct errors using the list of files and the Edit button. Then click Retry.▪ Click Cancel to end the process without making the requested changes. If no errors occur , the Database Operations window appears. |
| 7 | Click Exit when processing completes successfully. |

Illustrated Procedures

To see procedures for these tasks with pictures of the appropriate installation windows, go to [Creating and Loading Databases](#) in Chapter 14, Installation-Migration Checklists with Illustrated Procedures.

Results of Running the Setup Program

The Setup program performs the following tasks:

- For each new environment, creates a new subdirectory one level below the **\instenv** directory. It is named **\envx**, where *x* is the sequential number assigned by the Database Server Setup program.
- Updates the **createld.ini** file, which contains a record of your responses during the setup process. The **createld.ini** file is located in the **\instenv\envx\createld** directory on the file server.
- During Database Create processing, generates the SQL code that creates the SmartStream databases. These files are stored in the **\dbms** directory on the file server.
- During Database Load processing, loads the databases with the tables, views, stored procedures, triggers, and data for the SmartStream products.
- Generates these files in the **\instenv\envx\createld\create** and **\instenv\envx\createld\load** directories:

| File type | Extension | Purpose |
|-----------|-----------|--|
| Output | .out | Describes each process the Setup program performed. |
| Restart | .rst | Identifies the process running when the Setup program is interrupted and where the program begins when you restart it. |
| Error | .err | Describes problems that caused the Setup program to fail or install unsuccessfully. |

Loading SmartStream Language Kits

If you have licensed language kits, complete this procedure for each one:

| Step | Action |
|------|--|
| 1 | Run setup.exe from the <code>\createld</code> directory at the root of the language kit file server image. Result: The Welcome to the SmartStream database create/load program window appears. |
| 2 | Click Next. Result: The Database Server window appears. |
| 3 | Enter information about the server where you want to load the language kit data and click Next. Result: The Product Selection window appears. |
| 4 | Use the buttons to choose the products that you want to install and click Next. Result: The Database Load Summary window appears. |
| 5 | Review the selections you made. If you need to make changes, click Back. If you want to continue, click Next then Finish. Result: The setup program begins loading data. |
| 6 | If errors occur during processing, the Database Error Review window appears. Take one of the following actions: <ul style="list-style-type: none">▪ Correct errors using the list of files and the Edit button. Then click Retry.▪ Click Cancel to end the process. |

Illustrated Procedure

To see a procedure for this task with pictures of the appropriate installation windows, go to [Loading SmartStream Language Kits](#) in Chapter 14, Installation-Migration Checklists with Illustrated Procedures.

Troubleshooting

The list of products displayed by the Setup program is determined by the settings in the [COPY] section of the dbsinst.ini file.

The Setup program uses a set of configuration files to drive its processing. These configuration files reside in the **\products** directory on the SmartStream file server. The product.ini file contains a list of all the products, along with the name displayed for users and the various database families associated with each. Here is a portion of the product.ini file:

```
[LEDGER]
BranchesPossible=No
UdakableFamilies=Yes
TableInitPossible=Yes
DisplayName=Ledger
DbsinstiniKey=LEDGER
Family1=glep
Family2=jepc
```

For each of the database families listed, a separate .ini file resides in the **\products** directory. These files contain the default database size information, along with the entry points to the family's database.prf file. The family's database.prf file resides in the **\DBMS\family** directory on the SmartStream file server. It defines the SQL statements that are run to install, configure, and migrate that database family.

The Setup program uses a .dll version of the WJAMIT utility (wjam.dll) to perform database work. This .dll requires the 32-bit version of Sybase PC Client or the Microsoft SQL Server Client. If you get a message that wjam.dll cannot be loaded, that usually means that the 32-bit drivers wjam.dll depends on have not been loaded.

This table shows possible problems and the suggested solutions:

| Problem | Possible Solutions |
|---|---|
| The Setup program displays a message indicating that it stopped and cannot complete the process. | Diagnose and correct the problem. Note the product that the Setup program was creating databases for when it stopped. |
| The Setup program stops for such reasons as power failure, network failure, and lack of space on the database server. | Start the Setup program, and select Restart as the type of installation. Be sure to select the product you were creating databases for when you exited. |
| The Setup program displays a message indicating that you selected a database to load that does is not found. | Take one of the following actions: <ul style="list-style-type: none"> ▪ Press Alt-Tab to go to another window and create the database that is missing using another tool. Start the Setup program, and choose Restart. ▪ Choose Exit. Create the database using the Setup program, and continue with the database load portion of the Setup program. |
| Error information is displayed after the Setup program loads a database. | Correct the error, and restart this process. |

| Problem | Possible Solutions |
|---|--|
| <p>For Database Create processing, error files are written to the instenv\env\%createld\create directory on the file server.</p> <p>For Database Load processing, error files are written to the instenv\env\%createld\load directory on the file server.</p> | |
| <p>The Setup program displays a message indicating that the database log ran out of space.</p> | <p>Use the following procedure to expand the transaction log:</p> <ol style="list-style-type: none"> 1. Press Alt-Tab to go to another window. 2. Expand the transaction log using another tool. 3. Press Alt-Tab to return to Setup. 4. Choose Restart. |

Installing SmartStream Builder on the Database Server

Complete the following tasks and enter the appropriate setup options before installing SmartStream Builder on the database server only:

Prerequisite Tasks

- Install SmartStream Builder on the file server.
- Get a system administrator password.
- If the other products supported by this file server have had their accounting key tailored, you must also tailor the accounting key for the new product.

Setup Options

Select these setup options for the database server:

| Option | Select or Choose |
|------------------------------|---|
| Environment to Install | The environment where you want to install SmartStream Builder. |
| Database Server Name | The database server where you are installing SmartStream Builder. |
| System Administrator Role ID | The system administrator role ID. |
| Password | The password for the system administrator role ID. |

Running the Setup Program

The database load for SmartStream Builder is performed using the regular SmartStream Database Server Setup program. After you install SmartStream Builder on your SmartStream file server, SmartStream Builder is displayed as one of the products on the Product Selection window during Database Load processing.

Run setup.exe from the **\createld** directory at the root of the file server image twice: once to create the databases and once to load them.

Results of Running the Setup Program

The setup program for SmartStream Builder changes some SmartStream databases on the database server by loading

- SmartStream Builder stored procedures
- SQL code
- Triggers.

Adding SmartStream Products Between Releases

If you want to add SmartStream products and language kits to your environment between releases, use the following guidelines.

Prerequisite Tasks

- Run the File Server Setup program to install the additional SmartStream products on the file server.
- Run the File Server Setup program for each language kit to install the additional language kits on the file server.

UDAK Requirements Before Running the Database Server Setup Program

You need to complete the following steps only if you are loading new products into an environment where the accounting key has been tailored.

| Step | Action | | | | | | |
|----------------|--|-----------|--------------------------|--------------|--------------------------------------|----------------|-----------------|
| 1 | Run <code>udak.exe</code> from the <code>dbms\udak</code> directory on your file server. Result: The User-Defined Accounting Key Log On window appears. | | | | | | |
| 2 | Select Not Available - Only CD to file server completed as the database server status. | | | | | | |
| 3 | Select the Processing Level option. <table border="1" data-bbox="565 1119 1442 1262"> <thead> <tr> <th>Select...</th> <th>If the new product is...</th> </tr> </thead> <tbody> <tr> <td>All products</td> <td>A product other than Consolidations.</td> </tr> <tr> <td>Consolidations</td> <td>Consolidations.</td> </tr> </tbody> </table> | Select... | If the new product is... | All products | A product other than Consolidations. | Consolidations | Consolidations. |
| Select... | If the new product is... | | | | | | |
| All products | A product other than Consolidations. | | | | | | |
| Consolidations | Consolidations. | | | | | | |
| 4 | Select Full - Process all UDAK objects for a given product as the run mode. | | | | | | |
| 5 | Choose OK. Result: A message appears to inform you that the process will run in Full mode for all languages and products previously configured. | | | | | | |
| 6 | Choose OK. Result: The Product Selection window appears. | | | | | | |
| 7 | Select the new product you want to install and choose OK. Result: The User-Defined Accounting Key Logon Recap window appears. | | | | | | |
| 8 | Choose Continue Recap . Result: The User-Defined Accounting Key Language/Product Recap window appears. | | | | | | |

| Step | Action |
|------|---|
| 9 | Choose Configure System . Result: The Configuration Status window appears. |
| 10 | Choose OK when the prompt informs you that the configuration is complete. |

Setup Options

Use the following guidelines as you make your selections when you run the Database Server Setup program:

Environment

Select your existing environment in the SmartStream Environment field on the SmartStream Environment window.

Education Data

| If you... | Then you... |
|------------------------------------|---|
| Did not tailor your accounting key | Can load the education data. |
| Tailored your accounting key | Cannot load the education data for the products that you are adding to the database server. |

Running the Database Server Setup Program

Run the Database Server Setup program to create and load databases for the additional products on the database server.

If you are also adding additional language kits, you run the Database Server Setup program from the language directory to load the language components.

Reinstalling Job Server and Client

You must also run the Job Server Setup program to reinstall Job Server and the SmartStream Client Workstation Setup program to install the additional products on the client workstation.

UDAK Requirements After Installing Products and Language Kits

You need to complete the following steps only if you are loading new products into an environment where the accounting key has been tailored.

| Step | Action | | | | | | |
|----------------|---|-----------|--------------------------|--------------|--------------------------------------|----------------|-----------------|
| 1 | Run <code>udak.exe</code> from the <code>\dbms\udak</code> directory. Result: The User-Defined Accounting Key Log On window appears. | | | | | | |
| 2 | Select Available - Full install completed as the database server status. | | | | | | |
| 3 | Enter sa as the logon ID. | | | | | | |
| 4 | Enter the sa password as the password. | | | | | | |
| 5 | Select the Processing Level option. <table border="1"> <thead> <tr> <th>Select...</th> <th>If the new product is...</th> </tr> </thead> <tbody> <tr> <td>All products</td> <td>A product other than Consolidations.</td> </tr> <tr> <td>Consolidations</td> <td>Consolidations.</td> </tr> </tbody> </table> | Select... | If the new product is... | All products | A product other than Consolidations. | Consolidations | Consolidations. |
| Select... | If the new product is... | | | | | | |
| All products | A product other than Consolidations. | | | | | | |
| Consolidations | Consolidations. | | | | | | |
| 6 | Select Special - Process the following class(es) of objects as the run mode. Then select Architecture Tables . | | | | | | |
| 7 | Choose OK. Result: The User-Defined Accounting Key Log On Recap window appears. | | | | | | |
| 8 | Choose Configure System . Result: The Configuration Status window appears. | | | | | | |
| 9 | Choose OK when the prompt informs you that the configuration is complete. | | | | | | |

7 Preparing the SmartStream Client Workstations

Chapter Contents

| | |
|------|---|
| 7-1 | Before You Begin |
| 7-2 | Considerations for Windows |
| 7-3 | Installing Sybase PC Client and ODBC Drivers |
| 7-6 | Installing Microsoft SQL Server Client and ODBC Drivers |
| 7-8 | Installing Microsoft Access |
| 7-9 | Considerations for SmartStream Budget |
| 7-10 | Installing Software for Pivot Table Functionality |
| 7-11 | Considerations for SmartStream Funds Control |
| 7-12 | Installing Cognos PowerPlay and Impromptu |

Before You Begin

Before preparing the client workstations, you must complete the tasks in these chapters:

- Chapter 2, Preparing the Environment
- Chapter 3, Preparing and Installing the File Server

If you want the SmartStream client workstation to connect to the database servers, you must also perform the tasks in

- Chapter 4, Preparing the Sybase Database Server or Chapter 5, Preparing the Microsoft Database Server
- Chapter 6, Installing SmartStream Products on the Database Server.

Disk Sizing Requirements

For the disk sizing requirements for SmartStream client workstations, see Appendix C, Minimum Sizing Requirements.

Considerations for Windows

This section provides information to consider when you configure your supported Microsoft Windows operating system.

Required Date Format

The four-digit year format is the required date format for client workstations. To configure the date format for your Windows operating system, follow instructions in the Windows Help for regional settings.

Automatic thumbs.db File Creation

On the Windows operating system, thumbs.db files are created automatically.

The thumbs.db file is a cached version of the thumbnails for a movie or a picture file. It was designed to speed up loading thumbnails when you load movies and picture files; however, thumbs.db files can cause issues with Windows Explorer operations such as installing, deleting, and copying.

Turning Off This Function

To turn off automatic creation of thumbs.db files and prevent associated issues, complete this procedure:

| Step | Action |
|------|--|
| 1 | Click the Start menu and click Run . |
| 2 | Type gpedit.msc in the Open field and click OK . Result: The Group Policy utility opens. |
| 3 | Click User Configuration in the left panel. Then, in the right panel, double-click Administrative Templates , then Window Components , and then Windows Explorer . |
| 4 | Double-click the Turn off the caching of thumbnails in hidden thumbs.db files option. Result: The corresponding properties dialog box opens. |
| 5 | Click the Enabled option. |
| 6 | Click OK . |
| 7 | Close the Group Policy utility. |

Installing Sybase PC Client and ODBC Drivers

Sybase PC Client software must be installed on SmartStream client workstations in SmartStream environments using Sybase Adaptive Server Enterprise.

SmartStream Recommendations

Consider the following recommendations when you make decisions during the installation process:

Components

The following components are required:

- Connectivity
- Adaptive Server Enterprise ODBC
- Net-Library Drivers

Net-Library Drivers

The following net-library drivers are supported:

- Windows Sockets
- Named Pipes

Optionally, you can install the following components:

- Sybase Central
- Language Modules
- Sybase ASE OLE DB

Long File Names

The SmartStream environment does not support long file names.

- Warning:** For the destination directory and its subdirectories, **do not**
- Use long names
 - Embed spaces or periods in the names.

Installation Instructions

- Review the Sybase documentation **carefully** before starting the PC Client installation.

Running the Setup Program

Run the setup.exe program on the Sybase PC Client CD.

For information about where to find and how to run the setup.exe, see the appropriate Sybase documentation.

Configure and Test Sybase PC Client

Perform these tasks after installing Sybase PC Client software.

For Non-English Versions of Windows

- If you install the PC Client software on a workstation installed with a non-English version of Microsoft Windows, define the following Environment Variable to your system using the System utility on the Control Panel:

LANG=en

Testing PC Client Connection to the Database Server

- Complete the following steps to test the PC Client connection between the Windows workstation and the database server:

| Step | Action |
|------|---|
| 1 | From the Sybase Program group, run the dsedit utility. |
| 2 | Click OK on the Select Directory Service window. |
| 3 | On the Server Object menu, click Add , enter the server name, and click OK. |
| 4 | Select the server name you just added. Then on the Server Object menu, click Modify Attributes . |
| 5 | Click Add , enter the connection information for the server, and click OK. Note: Ensure that TCP is selected as the protocol. |
| 6 | Select the server name you just added. Then on the Server Object menu, click Ping Server . Result: If a message appears stating that your server is alive, the workstation is connected to the database server. |

Sybase ODBC Drivers

SmartStream requires that you select the Sybase System ODBC driver to connect to Sybase data sources for the current release of SmartStream.

Configure and Test Sybase ODBC Drivers

Complete this procedure to configure the ODBC drivers and test the ODBC connection between the Windows workstation and the database server:

| Step | Action |
|------|--|
| 1 | Open the 32-bit Data Sources (ODBC) utility. Note: This is the name and path of the 32-bit utility: %WINDIR%\SysWOW64\odbcadm32.exe |
| 2 | Add a System DSN for your server and select the Adaptive Server Enterprise driver. |
| 3 | On the General tab, enter the following information: <ul style="list-style-type: none"> ▪ Data source name ▪ Description ▪ Server name (ASE Host Name) ▪ Server port |
| 4 | Click Apply to apply the settings. |
| 5 | Click Test Connection , enter a valid ID and password, and click OK. Result: If the following message appears, the workstation is connected to the database server: Login Succeeded |
| 6 | Click OK. Result: The data source is saved. |

Troubleshooting

This table lists some possible causes and solutions if your workstation fails to connect after you install PC Client software.

| Problem | Possible Resolutions |
|---|--|
| The client workstation did not connect, or errors occurred while using FTP PC/TCP 32 software. | Run dsedit to ensure you are using the nlwnsck.dll, not the nlfptc.dll, in the configuration of your server entry. |
| The database server did not connect. If the database server cannot connect, the settings in the sql.ini file might be wrong. | Check the entries in the sql.ini file to ensure they are appropriate. Either run dsedit to check this, or edit this file directly. This file is in the x:\sybase\ini\sql.ini directory, where x:\sybase is the directory where you installed PC Client software. |
| You cannot log on to SmartStream using a Windows workstation, but you can connect to the server. | Ensure that you have the 32-bit version of PC Client software installed on your client workstation. |

Installing Microsoft SQL Server Client and ODBC Drivers

Microsoft SQL Server Client software must be installed on SmartStream client workstations in SmartStream environments using Microsoft SQL Server. See the **Supported Technical Environments** for your release for the correct version of third party tools.

SmartStream Recommendations

Accept all defaults when you install Microsoft SQL Server Client software.

Installation Instructions

For information about installing Microsoft SQL Server Client software, see the Microsoft SQL Server Setup guide.

Configure and Test the Microsoft SQL Server Client

After installing Microsoft SQL Server Client software, complete the following tasks to configure it and test the connection between the client workstation and the database server.

- Ensure that TCP/IP is an enabled protocol.
- Add a server alias with the TCP/IP network library as the protocol.
- Test connectivity to the server by running a query tool and connecting to the server using the alias you just added.

Microsoft Windows ODBC Drivers

Microsoft Windows ODBC Drivers software must be installed on SmartStream client workstations in SmartStream environments using Microsoft SQL Server.

Installation Instructions For information about installing Microsoft Windows ODBC Drivers software, see the Microsoft SQL Server Setup guide.

Configuring and Testing the ODBC Drivers

Perform these tasks after installing Microsoft ODBC drivers software:

- You must add an ODBC data source for your database server on the workstation where ODBC is installed.
- Verify that you added the data source correctly using the Data Sources (ODBC) utility.

| Step | Action |
|------|---|
| 1 | Open the 32-bit Data Sources (ODBC) utility. Note: This is the name and path of the 32-bit utility: %WINDIR%\SysWOW64\odbcadm32.exe |
| 2 | Add a System DSN for your server and select the appropriate SQL Server driver. . See the Supported Technical Environments for your release for the correct version of third party tools. Result: The Create New Data Source wizard is displayed. |
| 3 | Enter the following information and click Next: <ul style="list-style-type: none"> ▪ Data source name ▪ Description ▪ Server name |
| 4 | Enter authentication information and click Next . |
| 5 | Click Apply to apply the settings. |
| 6 | Click Test Data Source , enter a valid ID and password, and click OK. Result: If a message appears stating that the test completed successfully, the workstation is connected to the database server. |

Installing Microsoft Access

Microsoft Access must be available to all SmartStream client workstations used to run delivered SmartStream reports.

For more information about installing Microsoft Access, see the Microsoft Access documentation.

Configuring and Testing the ODBC Drivers

Microsoft Access 64-bit requires an 64 bit ODBC connection. Perform these tasks after installing Microsoft ODBC drivers software:

- You must add an 64-bit ODBC data source for your database server on the workstation where ODBC is installed.
- Verify that you added the data source correctly using the Data Sources (ODBC) utility.

| Step | Action |
|------|--|
| 1 | Open the 64-bit Data Sources (ODBC) utility. Note: This is the name and path of the 64-bit utility: <code>%WINDIR%\System32\odbcadm32.exe</code> |
| 2 | Add a System DSN for your server and select the appropriate driver. . See the Supported Technical Environments for your release for the correct version of third party tools. Result: The Create New Data Source wizard is displayed. |
| 3 | Enter the following information and click Next: <ul style="list-style-type: none"> ▪ Data source name ▪ Description ▪ Server name (For Sybase this is the ASE Host Name) ▪ Server port (Only necessary for Sybase) |
| 4 | Enter authentication information and click Next . |
| 5 | Click Apply to apply the settings. |
| 6 | Click Test Data Source , enter a valid ID and password, and click OK. Result: If a message appears stating that the test completed successfully, the workstation is connected to the database server. |

Considerations for SmartStream Budget

This section applies to SmartStream client workstations in SmartStream environments using Sybase Adaptive Server Enterprise or Microsoft SQL Server.

- If you are going into production and have finished setting up Enterprise Policy, you run the budent32.exe program.

The system administrator should run the budent32.exe program at the following time:

- After SmartStream Budget is installed on the database server
- After Enterprise Policy is established
- Before users install the Workbench on their client workstation

For more information about the budent32.exe program, see Chapter 13, After Completing the Setup Process.

Installing Software for Pivot Table Functionality

The following software must be available to all SmartStream client workstations with SmartStream Budget installed if the users are going to use the Pivot table functionality.

- Microsoft Excel

Microsoft Excel

For more information about installing Microsoft Excel, see the Microsoft Excel documentation.

Considerations for SmartStream Funds Control

Installation of a SmartStream Funds Control client is not required on all workstations. The Funds Control available funds checking program (ffcc1000.dll) is installed with the SmartStream Shared Components.

This is sufficient for users who enter and maintain procurement, ledger, and receivable documents that require available funds checking.

Administrators and Budget Managers

A full SmartStream Funds Control client installation is required for administrators and budget managers who have to

- Set up Funds Control policies
- Consult Fund Control balances
- Maintain Funds Control budgets
- Manage Funds Control exceptions.

Installing Cognos PowerPlay and Impromptu

Cognos PowerPlay and Impromptu must be available to all SmartStream client workstations used to run SmartStream Open Analyzer.

We recommend that you install them on the file server so that PowerPlay and Impromptu can be installed easily on the client workstation.

More Information

For information about installing PowerPlay and Impromptu, see the Cognos PowerPlay and Impromptu documentation.

8 Installing SmartStream Products on the Client Workstations

Chapter Contents

| | |
|------|--|
| 8-1 | Before You Begin |
| 8-2 | About the SmartStream Client Workstation Setup Program |
| 8-4 | Setting Up Profiles |
| 8-5 | How the Setup Program Uses Profiles |
| 8-6 | Running the Setup Program |
| 8-8 | Running SmartStream Client Workstation Setup Remotely |
| 8-9 | Post-Installation Tasks for SmartStream Budget |
| 8-12 | Post-Installation Task for the SmartStream Reference Tool |
| 8-13 | Post-Installation Task for SmartStream Projects |
| 8-14 | Uninstalling SmartStream Software from a Client Workstation |
| 8-15 | Considerations for Upgrading SmartStream Client Workstations |
| 8-21 | Installing SmartStream Builder on the Client Workstation |
| 8-23 | Considerations for Using Microsoft Terminal Services (MTS) |

Before You Begin

Before installing SmartStream products on client workstations, complete the tasks in the following chapters:

- Chapter 2, Preparing the Environment
- Chapter 3, Preparing and Installing the File Server
- Chapter 7, Preparing the SmartStream Client Workstations

Worksheets

Installation worksheets are provided to help you plan your installation of SmartStream. See the SmartStream Client Workstation Worksheet in Appendix B.

About the SmartStream Client Workstation Setup Program

System administrators have different approaches to installing software on the SmartStream client workstations. Some let users install their own software. Others prefer a more centralized approach in which they either perform or direct the installation process. You can use the setup program to install software using both approaches.

How the Setup Program Works

The two methods of running the setup program are available:

- Simple
- Custom

The method you use depends on the information you enter in the command line when you start the setup program. For more information about command line entries, see *Running the Setup Program* in this chapter.

Simple

The setup program installs software according to the system administrator's specifications with minimal user interaction.

The simple method is useful in a centralized enterprise. The system administrator determines what SmartStream products the user installs and where they are installed. The SmartStream user does not need to know how to install SmartStream.

Profiles

When the setup program is run using the simple method, it uses a profile. A *profile* is a file that contains information the setup program requires for installing software. For example, a profile contains the destination directory and the products to install.

The system administrator can add a profile for each user or for each group of users that share the same installation requirements.

Example

All members of a department in your enterprise have the same installation requirements, and the workstations for the members of this department have the same configuration. The system administrator adds a profile that specifies how SmartStream is installed for all users in this group. The users start the setup program and install the software without further intervention.

The manager can have different installation requirements from the group. The system administrator can add a profile used only by the manager or let the manager run the setup program using the Custom method.

Custom

Users can run the setup program if they are allowed to install software according to their personal specifications.

The Custom method is useful in an enterprise that is decentralized because the individual user decides what products to install and where to install them.

Setting Up Profiles

To set up profiles, use the setup program. Be sure to start the setup program using the Custom method.

Starting the Setup Program Using the Custom Method

To start the setup program using the custom method, add `/a` to the command that starts the setup program.

Creating a Profile

You can add new profiles or change the ones you have already added.

To add a profile, use one of the following methods:

- Enter all the information needed to install SmartStream to your specifications and save the information as a new profile.
- Select a profile, change it, and then save it with a new file name. The setup program does not change the original profile.

Location

Store the profiles in the same directory as the setup program.

How the Setup Program Uses Profiles

To install SmartStream using the Simple method, you must first add a profile. For more information about setting up profiles, see the Setting Up Profiles section in this chapter.

When you use the Simple method for installation, the setup program uses profiles as follows:

| Stage | Description |
|--------------|---|
| 1 | The user starts the setup program on the file server. |
| 2 | The setup program searches the directory containing the setup program for profiles. |
| 3 | The setup program displays the Profile Selection window and the profiles that are set up. |
| 4 | The user selects a profile. |
| 5 | The setup program starts the installation process. |

Running the Setup Program

You can run the setup program using the Simple and Custom methods.

Simple

| Language | Use this command line... |
|-----------------|---|
| English | <i>drive:\directory\ss\setup.exe</i> |
| Other Languages | <i>drive:\directory\language directory\ss\setup.exe</i> |

Custom

Note: The */a* is required to start the setup program for the Custom method.

| Language... | Use this command line... |
|-----------------|--|
| English | <i>drive:\directory\ss\setup.exe /a</i> |
| Other Languages | <i>drive:\directory\language directory\ss\setup.exe /a</i> |

Target Directory

The **c:\program files** directory and subdirectories are considered system file areas, and they have special properties. We do not support installing SmartStream programs in the **c:\program files** directory because doing so causes issues with SmartStream. The default installation directory name is **sstrmxx**, where **xx** is the SmartStream release number. The **sstrmxx** directory is the supported installation directory.

Illustrated Procedure

To see a procedure for this task with pictures of the appropriate installation windows, go to [Installing SmartStream Clients](#) in Chapter 14, Installation-Migration Checklists with Illustrated Procedures.

Reboot the Workstation

Be sure to reboot the workstation after you successfully run the setup program.

Product Selection

Some products require other products to function properly. Therefore, when you select one product, another product might also appear in the list of products to install.

Network Installation Solution

If your enterprise needs a network installation solution, using Microsoft Terminal Services to implement the client installation is recommended.

For information about installing and configuring SmartStream on a Microsoft Terminal Services and Citrix XenApp platform, see the *Thin Client Installation Guide*.

Results of Running the Setup Program

The setup program performs the following tasks during the installation process:

- Generates the dbfiles.log file in the destination directory. This file contains a list of all the files copied to the client workstation.
- Generates a dbs.ini file in the destination directory
- Adds the following entries to your win.ini file (in the directory where SmartStream is installed on the client workstation):

```
[DBS]
CurrentRelease=SS80
SS80=drive\directory\dbs.ini
```

- Compares files copied from the file server with the files on the client workstation.

| If the setup program finds files with the same name and... | Then the files are... |
|--|-----------------------|
| The date and version number match | Copied. |
| The version number or date of the files copied are more recent than that of the files in the destination directory | Copied. |

The names of SmartStream files that are not copied to the client workstation are listed in the setup.err file.

Troubleshooting

Problem

The setup program

- Displays messages indicating that it did not install all the SmartStream files to the client workstation
- Does not run when you start SmartStream.

Possible Solution: Copy Files

If the message lists the specific files that are not installed, complete this procedure:

| Step | Action |
|------|--|
| 1 | Move the files listed in the setup.err file from the local directories to another directory. |
| 2 | Copy the files listed in the setup.err file from the file server to your client workstation. |

Running SmartStream Client Workstation Setup Remotely

SmartStream also provides a method your system administration personnel can use to install software on many SmartStream client workstations for the first time remotely.

The *profilename.pro* method is a batch version of the simple method of running the client workstation setup program described earlier in this chapter.

When you use this method, the *ishield.exe* program installs the SmartStream client according to the system administrator's specifications with little or no user intervention.

Prerequisite

The system administration personnel must add the required profiles and store them in the `\\ss` directory of the file server.

Starting the Process

You can start this program by running a `.bat` file containing this command:

```
drive:\directory\ss\ishield.exe sms ; profilename.pro
```

For More Information

The *profilename.pro* method is a variation of the Automated Client Reinstallation process. The command line you enter in the `.bat` file determines whether this program installs new clients or upgrades or refreshes previously installed clients.

For more information, see the *Automated Client Reinstallation Guide*.

Post-Installation Tasks for SmartStream Budget

Perform the following tasks after installing SmartStream Budget.

Customizing the budget.ini File

Run the budent32.exe program that resides in the **ss/enterprz** directory where SmartStream is installed on the file server. This customizes the budget.ini file that provides Workbench with the basic information that it needs for processing.

For more information about tailoring your budget.ini file, see Before Installing Budget Workbench on the Client Workstations in the *Budget* guide.

Setting Up Budget Security

You need to complete the following task to set security up properly for Budget:

For Working with Job Scheduler

Set up a SmartStream user with the following identifier: DBSBATCH.

Then log on as that user and add a security profile for DBSBATCH for the database you are using.

For Working with the Budget Database

For the Budget database, grant each Budget user the permission to create tables using the following command:

```
use DBSbdgt
go
grant create table to user_id
go
```

For Budget users with environments running SQL Server 2005, or later, you must also create a schema using the following command, where *user_id* is the user ID of the user to which you granted the table create permission:

```
use DBSbdgt
go
create schema user_id authorization user_id
go
```

For All Users

Add a security profile for each Budget user ID.

Setting Up a Template for Workbench Import Requests

Before you import data to the Workbench, you must set up a template using Job Scheduler and the following information:

| Field | Value |
|------------------|----------------------------|
| Job Name | BUD_IMP |
| Job Qualifier | BUD_IMP |
| Public check box | Checked |
| Security Profile | Do not enter a value |
| Program Name | bbdc0100 |
| Parameters | Do not enter values |
| Poll | The poll you intend to use |

Defining an ODBC Data Source

To use Pivot Table functionality, you need to define an ODBC data source on your client workstation.

Add a data source named DBS. This data source uses the Access database driver to read data from the database used with the WorkBench.

You also need a 32-bit ODBC entry for the database server with which you are working.

Required Information

Use this information when you set up the data source:

- Choose Microsoft Access as the ODBC driver.
- Enter DBS as the data source name.
- Select dbs.accdb as the database. The dbs.accdb file resides in the directory where you installed SmartStream Budget.

Microsoft Excel

You must set up the appropriate trust centers.

Setting Up Attached Notes

If your client workstation had an earlier version of SmartStream Budget installed, you must reset the .wri extension association.

Use one of these methods to associate the .wri extension with wordpad.exe:

- Use the Windows Explorer
- Attempt to access an Attached Note, and select Yes when you are prompted to reassociate the .wri extension with wordpad.exe.

SmartStream Budget Workbench

If you install the SmartStream Budget Workbench only, run the `psrc2032.exe` program to register it as an OLE server program. The `psrc2032.exe` program resides in the `\platform` subdirectory of the destination directory.

Installing Budget on a Remote Workstation

A *remote workstation* is a unit that is not connected to the network.

Example of Using a Remote Workstation

Your job requires a significant amount of travel, so you frequently

- Load Budget files and data from the WorkBench onto a laptop computer
- Update the data during a business trip
- Pass the updated data back to the WorkBench and then to the file server.

For information about setting up a remote workstation for Budget, see the *Budget* guide.

Post-Installation Task for the SmartStream Reference Tool

You need to define an ODBC data source on your client workstation for the database server to which the SmartStream Reference Tool needs access.

Considerations

As you set up the data source for the database server and make your selections, consider this information:

- Choose one of these drivers.

| For this DBMS... | Choose this driver... |
|-----------------------------------|------------------------------|
| Sybase Adaptive Server Enterprise | Sybase System. |
| Microsoft SQL Server | SQL Server. |

- The data source name is usually a database server name.

Post-Installation Task for SmartStream Projects

If you install SmartStream Projects, run the following programs in the order listed:

- psrc2032.exe to register SmartStream Projects as an OLE server program
- psrc1032.exe

These programs reside in the **\platform** subdirectory of the destination directory on the SmartStream client workstation.

Uninstalling SmartStream Software from a Client Workstation

This section discusses uninstalling the following SmartStream software from the client workstation:

- SmartStream client
- SmartStream products

SmartStream Client

To uninstall the SmartStream client, complete this procedure:

| Step | Action |
|-------------|--|
| 1 | Open Control Panel. |
| 2 | Double-click Programs and Features. |
| 3 | Select SmartStream Client 8.0 from the list of programs and click Uninstall. |
| 4 | Click OK. |

The uninstall program removes all the software installed on the workstation during the SmartStream client installation. It leaves any files and directories created after the client was installed and the dbsfiles.log and setup.err files.

Also, the uninstall program leaves any files with a reference count greater than one on the workstation. If you do not uninstall the client before reinstalling it on a workstation, most of the files, including shared files, will have a reference count greater than one; therefore, the uninstall program will not remove them.

SmartStream Products

When you uninstall SmartStream products, the uninstall program removes all the files for those products that are installed on the client workstation. It leaves files created after the SmartStream products were installed.

Use the same Add/Remove Programs utility you use in uninstalling the client to uninstall SmartStream products. SmartStream directories that were added to the path are not uninstalled.

Considerations for Upgrading SmartStream Client Workstations

Consider the following information when planning a strategy for upgrading your SmartStream client workstations.

Uninstalling Previous Release

Unless you are using the Automated Client Installation process, you must uninstall the previous release of SmartStream on your client workstations before you can install the latest release on them.

Cleaning Up SmartStream Products You No Longer Use

As you install new releases of SmartStream, your needs can change. If you previously installed SmartStream products and do not want to install the latest version of all these SmartStream products, perform the following tasks to keep your client workstation free of software you do not use:

- If you customized .acddb files on your local client workstation, move them from the SmartStream directory to another directory.
- Uninstall SmartStream products you no longer want and install the SmartStream products you want on your client workstation.

Upgrade Options

SmartStream provides several options for upgrading your client workstations. These options are grouped by whether they upgrade

- A single workstation at a time or
- Many workstations remotely.

Single-Workstation Upgrade Option

When users select this option, they upgrade their workstations using the standard SmartStream client workstation setup program described in this chapter.

Each user performs these tasks:

| Task | Description |
|------|--|
| 1 | Uninstalls the previous release of SmartStream using the Add/Remove Programs utility from the workstation's Control Panel. |
| 2 | Evaluates the files remaining in the SmartStream directory for the previous release. |

| Task | Description |
|------|--|
| 3 | <p>Installs the new release of SmartStream by running <code>drive:\directory\ssl\setup.exe</code> on the SmartStream file server, where</p> <ul style="list-style-type: none"> ▪ <code>drive</code> is the drive where SmartStream 8.0 is installed ▪ <code>directory</code> is the directory where SmartStream 8.0 files reside. <p>Note: The user can use either the simple method (the setup program installs software according to the system administrator's specifications with minimal user interaction) or the custom method (the setup program installs software according to the user's personal specifications).</p> |

Considerations

- This process provides the most effective method for ensuring that all SmartStream products are upgraded on the client workstation.
- When you need to install a new product on the client workstation, this is the best option to select.
- The user or system administration personnel must perform the client installation at the user's workstation.
- Not all files are removed from the client directory for the previous SmartStream release when SmartStream is uninstalled. Any files added when service packs were applied (usually .acddb extracts) or created by the client remain in the client directory. If the client directory contains files, it is not automatically deleted.

Multiple-Workstation Upgrade Options

Using these options, your system administration personnel can upgrade many client workstations remotely. These processes minimize user involvement to varying degrees from little user intervention to none at all.

These are the multiple-workstation upgrade options SmartStream offers:

- Automated client reinstallation
- Client installation in batch mode with a command line parameter of **update**
- Client installation in batch mode with a command line parameter of **refresh**

Automated Client Reinstallation

The *Automated Client Reinstallation Guide* is available on the Documentation tab of the Infor Concierge under SmartStream *release number*, Installation, Automated Client Reinstallation Guide.

Running Automated Client Reinstallation

You can start this process by running a .bat file containing the following command:

```
drive:\directory\ssl\shield.exe update
```

Considerations

- Using this process, system administration personnel can upgrade workstations remotely with little or no user intervention. It is an automated process designed to run at times users are generally not at their workstations.
- This process is **not** recommended when you need to install a new product on the client workstation.

Update Method

The Update method provides another way of upgrading multiple client workstations to the new release with little user intervention. After you install the new release on your file server, you can apply the updated files to your client workstations running the **previous** release by running the client installation part of the Automated Client Reinstallation process in batch mode with a command parameter of **update**. This method is especially efficient if you are installing the new release of the same SmartStream products in the same directory.

To verify the SmartStream products that will be installed using the Update method, review the `dbfiles.log` file in the root of the SmartStream client directory.

Starting the Update Process

To start this process, type this command on the command line:

```
drive:\directory\ss\lshield.exe update
```

Results of Running the Update Process

The Update process performs the following tasks:

- Verifies that Update processing is allowed by comparing the version in the `version.ini` file on the file server with the version in the `version.ini` file on the client workstation. If the values match, Update processing is not allowed and the process stops.
- Reads the `dbfiles.log` file and deletes all files installed in the SmartStream directory for the previous release.
- Deletes the shortcuts for the previous release.
- Deletes the icons for the previous release.
- Deletes the directory for the previous release if the option to delete that directory (`del70dir`) is specified.
- Reads the `dbfiles.log` file to determine which SmartStream products to install.
- Adds this entry to the `db.ini` file:
[SETUP]
RefreshFrom=SmartStream version number from the `version.ini` file in the `\ss` directory on the file server
- Leaves the default setting in the `dbspath.ini` file that does **not** allow the program to rebuild the PBL Path (client installation program automatically changes this setting to allow rebuilding).
- Copies **all** files listed in the product `.prf` files regardless of their date-time stamps.
- Recreates the log file and adds a **replaced successfully** entry

- Updates the .ini files according to the product .prf files.
- Registers .ocx and.dll files according to the product .prf files.

Considerations

- The previous release of SmartStream placed many third-party software files in the Windows\system directory. You cannot safely delete these files. They must remain on the workstation.
- Files for obsolete products are deleted.

Refresh Method

The Refresh method provides a way of upgrading multiple client workstations to an updated version of the current release with little user intervention. After you install the updated version of the current release on your file server, you can apply the updated files to your client workstations running the **current** release by running the client installation part of the Automated Client Reinstallation process in batch mode with a command parameter of **refresh**. This method is especially efficient if you are refreshing the same SmartStream products to the same directory.

To verify the SmartStream products the Refresh method will install, review the dbfiles.log file in the root of the SmartStream client directory.

Running the Refresh Process

To start this process, type this command on the command line:

```
drive:\directory\ss\lshield.exe refresh
```

Results of Running the Refresh Process

The Refresh process performs the following tasks:

- Reads the dbfiles.log file to determine which SmartStream products to install.
- Adds this entry to the db.ini file:
[SETUP]
RefreshFrom=SmartStream version number from the version.ini file in the \ss directory on the file server
- Leaves the default setting in the dbspath.ini file to **prevent** rebuilding the PBL Path (client installation program automatically changes setting to allow rebuilding).
- Copies **all** files listed in the product .prf files regardless of time and date stamps.
- Recreates the log file and adds a **replaced successfully** entry
- Updates the .ini files according to the product .prf files.
- Registers .ocx and.dll files according to the product .prf files.

Considerations

- Obsolete files from the previous release remain in the client directory after refresh processing is completed.
- All files are copied from the file server to the client workstation even though most of them did not change.
- Any new files found on the file server are copied to the client workstation and placed in the correct subdirectory structure.
- You **cannot** use this process when you need to install a new product on the client workstation.

Difference Between the Refresh Method and the SmartStream Refresh Program

The Refresh method and the SmartStream Refresh program (refrsh32.exe) have the same purpose (refreshing the client), but the SmartStream Refresh program performs the task more quickly and efficiently.

The SmartStream Refresh program automatically refreshes the SmartStream directory on the client workstation when the user logs on to SmartStream.

The prerequisites for running refrsh32.exe successfully are as follows:

- Successfully applying an update or service pack to the SmartStream file server.
- The application process updates the files in the \ss directory and places a matching set of files in the \patch directory.
- The application process changes the following setting from 0 to 1:
[DBSUpdateApps]
Patch_Enabled=1

When a user logs on to SmartStream, the Refresh program copies any file in the \patch directory to the client workstation if its date-time stamp is later than that of the corresponding file on the client workstation.

Other Command Parameters

Two other command parameters are available:

- backupmdbs
- del70dir

backupmdbs

The backupmdbs parameter is designed to copy the current Microsoft Access .mdb files on the client workstation to a backup directory before updating begins. You can use this parameter with both the Update and the Refresh methods.

del70dir

The del70dir parameter is designed to delete the SmartStream directory for the previous release automatically, regardless of whether it still contains files. You can use this parameter only with the Update method.

Command String Syntax

Because the client installation program can now use UNC drive paths, these drive paths can contain embedded spaces. To accommodate embedded spaces, the command string must use a semicolon to separate command parameters.

Examples

*drive:\directory***ss\ishield.exe update; del70dir; backupmdbs**

*drive:\directory***ss\ishield.exe refresh; backupmdbs**

Installing SmartStream Builder on the Client Workstation

This section describes the installation of SmartStream Builder on the SmartStream client workstation.

Running the Setup Program

Note: If you previously installed SmartStream Builder and are installing it again on the same drive and directory, the setup program overwrites the previous version.

To run the setup program, complete this procedure:

| Step | Action |
|------|---|
| 1 | Run <code>\strmbldr\setup.exe</code> located on your SmartStream file server. Result: The Welcome to SmartStream Builder Client dialog box appears. |
| 2 | Click Next. Result: The Destination Directory dialog box appears. |
| 3 | Select the directory where you plan to install the SmartStream Builder Client and click Next. Warning: Do not install SmartStream Builder in your SmartStream directory. Result: The SmartStream Client Directory dialog box appears. |
| 4 | Enter the directory where the SmartStream client software has been installed and click Next. Result: The SmartStream Builder Client Summary dialog box appears. |
| 5 | Review your selections and click Next to finish the installation. |

Post-Installation Task

Use this procedure to copy the SmartStream bitmaps you need to the client workstation:

| Step | Action |
|------|---|
| 1 | Access the <code>\strmbldr</code> directory on the file server. |
| 2 | Copy the following bitmaps for the products you are customizing to your client workstation: <ul style="list-style-type: none"> ▪ .bmp. See the following table to determine which .bmp files you need. ▪ .ico ▪ shr*.bmp |

Bitmap Naming Conventions

| This SmartStream product... | Uses this naming convention... |
|------------------------------------|---|
| Allocations | fal*.bmp |
| Asset Management | ffa*.bmp |
| Budget | bbd*.bmp, fgl*.bmp |
| Consolidations | fco*.bmp |
| Financials - Other Products | fb*.bmp, fbd*.bmp, fbe*.bmp, fbi*.bmp, fbl*.bmp, fbm*.bmp, fbo*.bmp, fbr*.bmp, fbs*.bmp, fbv*.bmp, fbw*.bmp, fsa*.bmp |
| Funds Control | ffc*.bmp |
| Human Resources | hhr*.bmp |
| Ledger | fgl*.bmp, fje*.bmp, bbd*.bmp |
| Payables | fap*.bmp |
| Procurement Common | mcd*.bmp |
| Projects | fpj*.bmp |
| Projects Allocations | fpa*.bmp |
| Projects Common | fpc*.bmp |
| Purchasing | mpc*.bmp |
| Purchasing - Order | mpo*.bmp |
| Purchasing - Requisition | mrq*.bmp |
| Receivables | far*.bmp |
| Receiving | mds*.bmp |
| Shared Components | ccf*.bmp |
| Shared Components - Bank | fbk*.bmp |
| Shared Components - Calendar | ccl*.bmp, cos*.bmp |
| Shared Components - Currency | fcm*.bmp |
| Shared Components - Vendor | cvn*.bmp, dsg*.bmp |
| Supplies Management | mbm*.bmp, mim*.bmp, mcd*.bmp, mcm*.bmp, msc*.bmp, mds*.bmp, mbl*.bmp |

Considerations for Using Microsoft Terminal Services (MTS)

Microsoft recommends using user-global installation for Windows applications. Using this method, an application is installed once by an administrator, and then it can be run by anyone who logs into that Terminal Services.

For more information about installing and configuring SmartStream on a Microsoft Terminal Services and Citrix XenApp platform, see the *Thin Client Installation Guide*.

9 Installing the SmartStream Mail Gateway

Chapter Contents

| | |
|-----|--|
| 9-1 | Before You Begin |
| 9-2 | About the SmartStream Mail Gateway Setup Program |
| 9-3 | Prerequisite Tasks |
| 9-5 | Installing the SmartStream Mail Gateway |
| 9-6 | Logging On to the SmartStream Mail Gateway |
| 9-7 | Uninstalling the Mail Gateway |

Before You Begin

Before installing the SmartStream Mail Gateway, complete the tasks in these chapters:

- Chapter 2, Preparing the Environment
- Chapter 3, Preparing and Installing the File Server
- Chapter 4, Preparing the Sybase Database Server, or Chapter 5, Preparing the Microsoft Database Server
- Chapter 6, Installing SmartStream Products on the Database Server

Worksheets

Installation worksheets are provided to help you plan your installation of SmartStream. See the SmartStream Mail Gateway Workstation Installation Worksheet in Appendix B.

About the SmartStream Mail Gateway Setup Program

The Mail Gateway provides a connection between the

- Job Scheduler and your e-mail system
- Workflow and your e-mail system if you use SmartStream Mail-enabled To Do tasks.

The SmartStream Mail Gateway Setup program installs the Mail Gateway on a workstation.

Mail Server Considerations

SmartStream Mail Gateway is designed to work with a mail server using the Simple Mail Transport Protocol (SMTP) as the primary outgoing mail protocol. If your mail server does not meet all requirements listed in the Supported Technical Environments Knowledge Base article on the Infor Concierge, you must enter e-mail addresses manually using the SMTP, or Internet, format (*anyone@anycompany.anydomain*) on your SmartStream client.

Prerequisite Tasks

Complete the following tasks before installing the SmartStream Mail Gateway.

General Requirement

- If you previously had Mail Gateway installed, make sure that all mail is processed and the mail directory is empty. Then uninstall and delete the Mail Gateway components before installing SmartStream 8.0 Mail Gateway.

Sybase Adaptive Server Enterprise Requirement

- If you install in an environment with Sybase Adaptive Server Enterprise software, you must install PC Client. For information about installing PC Client software, see Chapter 2, Preparing the Environment.
- Create a SmartStream Mail Gateway mail directory. Use this directory **only** for mail. Mail Gateway polls for new mail messages in this directory:

| If SmartStream is installed in ... | The mail directory must be installed in... |
|------------------------------------|---|
| A supported Windows environment | A drive and directory shared by the Windows server and the Windows workstation serving as the SmartStream Mail Gateway. |
| The UNIX environment | Either a <ul style="list-style-type: none"> ▪ Drive and directory on the LAN ▪ Directory on the hard drive of the client workstation serving as the SmartStream Mail Gateway. |

- If the SmartStream Mail Gateway mail directory is installed on the LAN, ensure that UNIX can write to it.
- If you are in a UNIX environment, run the File Transfer Program (FTP) program on the SmartStream Mail Gateway client workstation.

| If your communications system is... | Use the... |
|-------------------------------------|----------------------|
| Windows | FTP Server Services. |

If the FTP process is not running, the Master Scheduler program cannot transfer electronic mail to the SmartStream Mail Gateway.

Note: FTP service is **not** used if the **DBSNOFTP** option is used in the UNIX pscsched.beg script.

Microsoft SQL Server Requirement

- If you install in an environment with Microsoft SQL Server software, install Microsoft SQL Server Client software. For information about installing Microsoft SQL Server Client software, see Chapter 2, Preparing the Environment.
- Create a SmartStream Mail Gateway mail directory. The directory must be used only for mail. SmartStream Mail Gateway polls for new mail messages in the mail directory.

The mail directory must be installed in a drive and directory that is shared by the Windows server and Windows workstation that serves as the SmartStream Mail Gateway.

- Ensure that the LAN ID used to log on to the SmartStream Mail Gateway workstation has read and write access to the SmartStream Mail Gateway mail directory. The SmartStream Mail Gateway uses this directory as a staging area for passing mail messages to the mail post office.
- Ensure that the LAN ID used to log on to the SmartStream Mail Gateway workstation has connectivity to the enterprise mail server.

For more information about setting up the SmartStream Mail Gateway, see the SmartStream Library.

Considerations for Installing the SmartStream Mail Gateway in a Windows Environment

Because Mail Gateway runs as a service, you must be a member of the local administrator's group to start and stop it.

If you run Master Scheduler as a service, the same thing is true of it.

Installing the SmartStream Mail Gateway

Complete the following information before running the setup program for the SmartStream Mail Gateway.

Setup Options

Set up the following options for the Mail Gateway:

| Option | Enter... |
|-------------------------|--|
| Destination Directory | The default is <i>drive:\mailgate</i> . Note: Do not install the Mail Gateway under a SmartStream client directory. |
| Service Name | The name of the Windows service for the Mail Gateway. Note: The service name must be unique for each instance of the Mail Gateway that is installed on a single workstation. |
| Mail Directory | The directory that SmartStream Mail Gateway checks for new mail. This was created during the prerequisite tasks. The default is <i>drive:\maildir</i> . |
| Mail Host Information | The server name and port number for your enterprise mail server. |
| Mail Sender Information | The name and e-mail address for your Mail Gateway. This address is displayed in the From field of mail sent by the Mail Gateway. |
| Mail Admin Information | The name and e-mail address of your Mail Gateway administrator. This is the reply-to address of mail sent by the Mail Gateway. |
| Mail Check Interval | The frequency, in minutes, that the mail directory is checked for new mail. Enter a value up to 59. |
| Mail Gateway Log File | A log file that stores processing and error information during the operation of the SmartStream Mail Gateway. The default is <i>drive:\mailgate\mailgate.log</i> . |

Running the Setup Program

Run the setup.exe program located in the following directory:

drive:\directory\mailsmtp

where *drive:\directory* is the location where SmartStream is installed on the file server.

Illustrated Procedure

To see a procedure for this task with pictures of the appropriate installation windows, go to [Installing the Mail Gateway](#) in Chapter 14, Installation-Migration Checklists with Illustrated Procedures.

Logging On to the SmartStream Mail Gateway

Before starting SmartStream Mail Gateway as a Windows service, you must first configure the mailgate.ini file.

Right-click the SmartStream Mail Gateway icon on the desktop and click **Run as administrator** to access the Mail Gateway Logon dialog box. Change the mail server information as needed, enter your SmartStream user ID and password, select the Update MAILGATE.INI option, and click OK.

Mail Gateway updates the mailgate.ini file with any changes you make to the mail server information and an encrypted version of the SmartStream password you enter on this dialog box. After you save the necessary configuration information, future logons do not require user intervention, and Mail Gateway runs as a service.

Note: You cannot run Mail Gateway using this icon. Mail Gateway runs only as a Windows service.

Troubleshooting

If you cannot log on to the Mail Gateway, complete the following tasks:

- Ensure that the logon ID has access to your SmartStream database server.
- Verify that the Mail Gateway workstation was rebooted after installation.
- If a SmartStream client is on the Mail Gateway workstation, verify that the Mail Gateway directory is not installed under the SmartStream client directory.
- Verify that the Local System account is used when running the Mail Gateway as a service.

Uninstalling the Mail Gateway

To uninstall the SmartStream Mail Gateway, use the Windows Control Panel.

10 Installing Job Server

Chapter Contents

| | |
|-------|---|
| 10-1 | Before You Begin |
| 10-2 | Establishing a Connection in the SmartStream Environment |
| 10-3 | About the Job Server Setup Program |
| 10-4 | Setup Options for All Job Server Setup Programs |
| 10-6 | Installing Job Server in a UNIX Environment |
| 10-8 | Installing Job Server in a Windows Environment |
| 10-9 | Running Job Server Programs as Windows Services |
| 10-10 | Running Scheduled Payroll Processing Reports Using a SmartStream Poll Service |
| 10-11 | Post-Installation Tasks |
| 10-12 | Adding Job Server Programs Between Releases |

Before You Begin

Before installing Job Server, complete the tasks in the following chapters:

- Chapter 2, Preparing the Environment
- Chapter 3, Preparing and Installing the File Server
- Chapter 4, Preparing the Sybase Database Server, or Chapter 5, Preparing the Microsoft Database Server
- Chapter 6, Installing SmartStream Products on the Database Server

Worksheets

Installation worksheets are provided to help you plan your installation of SmartStream. See the SmartStream Job Server Installation Worksheet in Appendix B.

Establishing a Connection in the SmartStream Environment

DBMS/ODBC Software

Sybase PC Client and Sybase ODBC drivers or Microsoft SQL Server Client software and Microsoft ODBC drivers must be installed on the job servers to provide a connection to the database servers.

For more information, see Chapter 2, Preparing the Environment.

UNIX Connectivity

The Job Server Setup program uses the rexec protocol to execute commands and transfer files.

About the Job Server Setup Program

The SmartStream Job Server Setup program copies the following programs from the file server to the Windows server or UNIX server:

- Master Scheduler program (pscc0010)
- Poll program (pscc0020)
- Asynchronous Remote Procedure Call (ARPC) programs (pscc0050 and pscc0051)
- Other Job Server programs

To install the Master Scheduler program and one instance of the Poll program, run setup.exe in the following directory:

drive:\directory\batch

Where *drive:\directory* is the location where SmartStream was installed on the file server.

Installing More Than One Windows or UNIX Job Server

If you install more than one job server on the Windows server or UNIX server, run the Job Server Setup program once for each Poll program.

Installing a Microsoft Windows Client Job Server

If you want to run scheduled jobs in the Windows environment, run the Job Server Setup program to install the Poll program (pscc0020.exe) on a Windows client workstation.

Setup Options for All Job Server Setup Programs

Environment to Install

Choose the environment where you want to install Job Server.

Destination Directory

Windows installations only.

The directory where you want to install all the Job Server programs.

UNIX Server Information

UNIX installations only.

UNIX Host Name The name of the UNIX server where you are installing Job Server.

Logon User ID Up to 30 alphanumeric characters.

The logon ID for the server where you are installing Job Server.

Password Up to 30 alphanumeric characters.

The password for the user ID. This field is encrypted. The password is case sensitive.

Location of Job Server Files The directory where you are installing Job Server. Do not enter slashes—forward (/) or backward (\)—in the directory name.

Database Server Information

Database Server Name The name of the server where the Table Server Database Cross-Reference table (TSDX table) resides.

Note: This name is case sensitive.

System Administrator Role ID Up to 30 alphanumeric characters.

The server and database login ID for the server and database that contain the TSDX table. The combination of user ID and password must also be valid for the server and databases to which the Master Scheduler must log on.

Password Up to 30 alphanumeric characters.

The password for the database server user ID. This field is encrypted. The password is case sensitive.

Poll Information

- Poll Name** Up to eight alphanumeric characters in all uppercase letters.
- The name of the poll. The value in this field must match the name of the poll as defined on the Poll Configuration table. This name is displayed in the Poll Name field of the Poll Configuration window.
- Path** The path to the Job Server table.

ARPC Server Information

- ARPC Server** The name of your Asynchronous Remote Procedure Call (ARPC) server. Enter the name of the database server that runs the Master Scheduler program.

Job Server Information

- Service Name** The suffix to add to the end of each service name to ensure that each installation of the Job Server service on a workstation is unique. The default is blank.

Installing Job Server in a UNIX Environment

This section describes how to install Job Server in a UNIX environment.

Prerequisite Tasks

- Ensure you have a valid UNIX user ID for the location where you are installing SmartStream Job Server.
- Ensure that your UNIX .profile contains appropriate paths for the following environment variables that are required by the Sybase database server:

HP-UX

```
SHLIB_PATH =  
SYBASE_OCS =  
SYBASE=
```

Sun

```
LD_LIBRARY_PATH =  
SYBASE_OCS =  
SYBASE=
```

AIX

```
LIBPATH =  
SYBASE_OCS =  
SYBASE=
```

- Ensure that your rexec session settings are correct.

The installation and migration scripts use the TCP/IP exec service (rexec) to copy files to the UNIX servers. To support a rexec session, your .profile must not contain **tty** commands. Remove or comment out all **tty** commands, or you will receive this error message:

```
Not a Terminal  
stty: Unknown Error
```

Running the Setup Program

Run the setup.exe program located in the directory that corresponds with your environment:

```
drive:\directory\batch\hp\
```

```
drive:\directory\batch\sun\
```

```
drive:\directory\batch\aix\where drive:\directory is the location where SmartStream is installed on the file server.
```

Illustrated Procedure

To see a procedure for this task with pictures of the appropriate installation windows, go to the [UNIX](#) section of Installing the Job Scheduler in Chapter 14, Installation-Migration Checklists with Illustrated Procedures.

Results of Running the Setup Program

The Setup program

- Copies the Job Server programs to the directory you specify
- Records the information you entered during the setup process in this environment's env.ini file.

Troubleshooting

The most common source of trouble is connectivity with the UNIX host where you are installing Job Server. The Job Server Installation program uses the rexec protocol to execute commands and transfer files to the UNIX host. The protocol is implemented using the \bin32\rexec32.dll and \bin32\prog32.dll files. Usually, if rexec runs from the command line, the installation runs without any problems.

If the Job Server installation program exits prematurely without issuing warning or error messages, the problem probably involves running a command on the UNIX host (out of disk space, no permissions to create directory, and so on). It has not been determined why diagnostic information is not always transferred back to the Windows client.

Post-Installation Task

- If you install SmartStream in a Sybase Adaptive Server Enterprise environment, use the following procedure to ensure that the user ID for the job server connects to the database server:

| Step | Action |
|------|---|
| 1 | Change the path in the profile of the home directory with the location of the database server programs. Example: path=/users/sybase/ocs-15-0/bin |
| 2 | Type these environment variables in the profile: SYBASE=/users/sybase MAIL=/users/mail |
| 3 | Type this command: isql -UDBS -Ppassword -Sservername Result: If you connect to the database server, this prompt is displayed: 1> |
| 4 | Type exit . |

Installing Job Server in a Windows Environment

This section describes the stages for installing Job Server on a Windows server.

Prerequisite

- Log on to the Windows server as a system administrator.

Running the Setup Program

Run the setup.exe program located in the following directory:

drive:\directory\batch\ntintel

Where *drive:\directory* is the directory where SmartStream was installed on the file server.

Illustrated Procedure

To see a procedure for this task with pictures of the appropriate installation windows, go to the [Windows](#) section of Installing the Job Server in Chapter 14, Installation-Migration Checklists with Illustrated Procedures.

Establishing the Connection to the Database Server

Use the following information to establish the connection to your database server.

If you are installing a Windows Job Server for SmartStream to connect to a Microsoft SQL Server database server, you need to establish a Microsoft ODBC connection to the database server. Consider the following information when you add the SmartStream data source using the **32-bit** ODBC Data Source Administrator utility:

- You must enter the same name for the data source and the server.
- The server name you enter for the data source must be the same as the server name you entered in the Table Family Server Database Cross-Reference (tsdx) table.
- The verification of the authenticity of the login ID must be set to SQL Server Authentication.
- The network address defaults if you defined the server during your client installation.

Running Job Server Programs as Windows Services

The Windows version of the Job Server Setup program automatically installs Master Scheduler, Poll, and ARPC as Windows services.

Service Names

Names with a user-defined suffix are automatically assigned to these services by the installation program.

Multiple Copies of Job Server

If you want to install more than one copy of Job Server on the same workstation, you must specify a unique directory and suffix to add to the names of the associated services for each copy of Job Server during the installation.

Uninstalling Job Server Programs as Windows Services

To uninstall Job Server programs as Windows services, complete these tasks:

- Use the Add or Remove Programs utility from the Windows Control Panel to remove the Job Server.
- Delete the directory where the Job Server files reside.

Running Scheduled Payroll Processing Reports Using a SmartStream Poll Service

For SmartStream Human Capital Management (HCM) clients, you must either

- Have a local printer attached to the workstation where Job Server is installed
- Use a network printer.

If you plan to use a network printer, ensure that the SmartStream poll service is configured as follows:

- The **Log on as** property is set to **This account**

Note: A service with the **Log on as** property set to **Local System account** will **not** have access to the network printers and drives.

- The account you specify has a profile on the workstation where the poll resides
- The network printer is defined to that account on that workstation.

Post-Installation Tasks

SmartStream Payroll

If you licensed SmartStream Payroll, you need to

- Implement ALLTAX
- Apply new control records for Payroll regulatory reporting.

ALLTAX

To implement ALLTAX, set up the ALLTAX data files on the Job Server where you installed the Payroll Job Server components. Use this table to determine when to perform this task:

| If you have... | Then perform this task... |
|--|--|
| Not installed SmartStream Payroll before | After completing the installation process described in this guide. |
| Installed SmartStream Payroll before | After completing the migration process. See the <i>SmartStream Migration Guide</i> . |

For more information about implementing ALLTAX, see *Setting Up ALLTAX* in the Payroll Technical Implementation chapter of the *Payroll Technical Reference*.

Payroll Regulatory Reporting

After setting up ALLTAX, you must also apply new control records for Payroll regulatory reporting. For more information about this process, see *Applying New Format Control Records* in the Regulatory Reporting chapter of the *Payroll Technical Reference*.

Illustrated Procedures

To see procedures for these tasks with pictures of the appropriate setup windows, go to [Setting Up ALLTAX and Payroll Regulatory Reporting](#) in Chapter 14, Installation-Migration Checklists with Illustrated Procedures.

Adding Job Server Programs Between Releases

If you add SmartStream products to your environment between releases, you must reinstall Job Server programs.

Use this procedure to reinstall Job Server:

| Step | Action |
|-------------|---|
| 1 | Run the File Server Setup program to install additional SmartStream products, SmartStream language kits, or both, on the file server. |
| 2 | Run the Database Server Setup program to install additional SmartStream products, SmartStream language kits, or both. |
| 3 | Stop the Master Scheduler, polls, and ARPC Master Server. |
| 4 | Use the Add or Remove Programs utility from the Windows Control Panel to remove all Job Servers. |
| 5 | Run the SmartStream Job Server program to reinstall the Job Scheduler programs and add the new Job Server programs. |
| 6 | Reconfigure the polls. |

11 Installing SmartStream Connect

Chapter Contents

| | |
|------|---|
| 11-1 | Before You Begin |
| 11-2 | Establishing a Connection |
| 11-3 | About the SmartStream Connect Setup Program |
| 11-4 | Installing SmartStream Connect in a Windows Environment |
| 11-5 | Troubleshooting |

Before You Begin

Before installing SmartStream Connect, complete the tasks in the following chapters:

- Chapter 2, Preparing the Environment
- Chapter 3, Preparing and Installing the File Server
- Chapter 10, Installing Job Server

Worksheets

Installation worksheets are provided to help you plan your installation. See the SmartStream Connect Installation Worksheet in Appendix B.

Establishing a Connection

DBMS/ODBC Software

Sybase PC Client and Sybase ODBC drivers or Microsoft SQL Server Client software and Microsoft ODBC drivers must be installed on the job servers to provide a connection to the database servers.

For more information, see Chapter 2, Preparing the Environment.

About the SmartStream Connect Setup Program

SmartStream Connect is an optional product. It is not available for installation unless your enterprise has licensed it.

The SmartStream Connect Setup program installs these programs on the Windows server:

- SmartStream Connect Download program
- SmartStream Connect Upload program
- Other SmartStream Connect programs

Installing SmartStream Connect in a Windows Environment

This section describes installing SmartStream Connect on a Windows server.

Setup Option

Environment to Install Choose a location where Job Server is installed and where you want to install Connect.

Running the Setup Program

Use the Windows server to run the setup.exe program located in the following directory:

drive:\directory\connect\ntintel

where *drive:\directory* is the directory where SmartStream is installed on the file server.

Illustrated Procedure To see a procedure for this task with pictures of the appropriate installation windows, go to the [Windows](#) section of Installing SmartStream Connect in Chapter 14, Installation-Migration Checklists with Illustrated Procedures.

Testing the Connection to the Database Server

- Use a system administrator's utility to ensure that the user ID for the SmartStream Connect server connects to the database server.

Troubleshooting

The Connect installation program simply copies the contents of the **\Connect\ntintel** directory on the SmartStream file server to the directory where Job Server was installed. If you have any difficulty running the program, you can easily copy the files yourself.

Location of Job Server

The installation program examines settings in the env.ini file to determine where Job Server was installed. If no instances of Job Server were installed, an error message is displayed, and you cannot continue installing Connect.

You must run the installation program from the computer where Job Server was installed. If you have installed Job Server in more than one directory on the current computer, select the Job Server instance where you want Connect installed.

12 Accessing SmartStream Product Documentation

Chapter Contents

- 12-1 About the SmartStream Product Documentation
 - 12-2 Accessing the SmartStream Library through the Help Menu
 - 12-5 Accessing Installation-Migration Documentation Through the Web
-

About the SmartStream Product Documentation

You can access the SmartStream product documentation from the Help menu of any SmartStream window.

The installation and migration information is available under the SmartStream product line on the Infor Document Central (docs.infor.com).

SmartStream Library

The SmartStream Library provides the following types of information:

- Product information, including
 - Product concepts and features
 - Implementation planning
 - Policy setup and administration
- Technical information, including
 - Database administration
 - Security, user, and workgroup management
 - Workflow management
 - Job Scheduler administration
 - Scheduled processing

For detailed field, window, and procedural information, see the online Help for your SmartStream product.

Accessing the SmartStream Library through the Help Menu

You can access the SmartStream product documentation by clicking **SmartStream Library** on the Help menu of any SmartStream window. This menu command opens a contents PDF containing links to the various product guides and technical references in PDF format.

Prerequisites

You must have the Adobe® Reader® software installed on your workstation to open the PDF files. The Reader can be downloaded from the Adobe Web site.

For a Windows 8 environment, you must also make the Adobe Reader the default PDF reader **before** you click **SmartStream Library** on the Help menu for the first time.

Using the Interactive PDFs

The SmartStream product documentation PDFs offer an HTML-like interactivity that allows linking within a guide, linking between guides, and linking to online Help.

Starting with SmartStream 8.0.02, the interactive guides are delivered as part of the SmartStream client. They are deployed for the initial version and any subsequent update through the current update deliverables installation processes.

Hints and Tips

When you open a PDF be sure to note its name (for example, bk_Ledger.pdf) in the title bar of the PDF reader.

Collapsing and Expanding All Bookmarks

To collapse all the bookmarks in the Bookmark pane, select any bookmark and on a

- Desktop keyboard, press the **Shift** key and the forward slash on the number pad (**Shift + /**).
- Laptop keyboard, press the **Shift** key, the Function key, and the forward slash on the **0** key (**Shift +Fn + /**).

To expand all the bookmarks, select any bookmark and press **Shift + ***.

Linking Within and Between Guides

When you click a link to information within the PDF currently open (blue link), the link destination is displayed and the PDF name in the title bar does not change. You can click the Previous View icon to return to the page you linked from.

When you click a link to information within another guide (orange link), the PDF for that guide opens in another instance of the PDF reader, and you see its name in the title bar. When you finish reviewing the information, close that PDF to return to the PDF you linked from.

Note: If the PDF for the other guide does **not** open in another instance of the PDF reader, you need to click the Reader **Edit** menu and click **Preferences**. When the Preferences dialog box opens, click the **Documents** category in the left pane, **clear** the **Open cross-document links in the same window** option, and click **OK**. Close all PDFs. The next time you link to information within another guide, the PDF for that guide opens in another instance of the PDF reader.

Adobe® Acrobat® Reader Navigation icons



The Previous Page and Next Page icons are on the left, and the Previous View and Next View icons are on the right.

Note: If the Previous View and Next View icons are not displayed, right-click the Reader toolbar, move to **Page Navigation** and then click the view icons.

Linking to Online Help Topics

When you click a link to an online Help topic in a PDF (green link), a Launch File dialog box opens. Click **Open**. The online Help file opens with the appropriate topic displayed. After you finish reviewing the topic, close the Help file. The PDF you linked from is still open at the page on which you clicked the Help link.

Note: Because of the Reader enhanced security, the Launch File dialog box cannot be bypassed. It opens every time you click a Help link.

Online Help

Many SmartStream online Help files can open an interactive PDF at the specified destination. For example, a Help topic refers to Displaying the International Bank Account Number (IBAN) in the Payables chapter of the *Financials Technical Reference*. The user clicks the shortcut control (the **Click** button) and the *Financials Technical Reference* PDF opens directly to the Displaying the International Bank Account Number (IBAN) destination.

Hints and Tips

SmartStream Library

In the online Help, references to additional documentation in the product guides are identified by the SmartStream Library graphic shown above. Click the **Click** button next to a reference (or the link text in the Structures online Help) to open a guide PDF at the specified destination. Close the PDF to return to the Help file.

Note: If a topic has more than one Click button, be sure to close the PDF before you click another button.

Other Help Files

The **Other Help Files** topic under **Additional Help** on the Contents tab of an online Help file contains a **Help Manager** button. Clicking the Help Manager button opens the Help Manager dialog box that lists the installed Help files available for your use. You can use the list to move from one Help file to another.

More Information

For more information about using online Help, see the **Using Help** topic under **Additional Help** on the Contents tab of any online Help file.

Accessing Installation-Migration Documentation Through the Web

SmartStream installation-migration documentation is available through the Infor Documentation Central (<https://docs.infor.com>).

Use Infor Documentation Central and select the SmartStream product and select the latest version of the SmartStream installation documentation, including planning documents and update deliverables information.

Access the SmartStream documentation using this procedure:

| Step | Action |
|------|---|
| 1 | Log on to the Infor Documentation Central portal. |
| 2 | Search for SmartStream. |
| 3 | Verify the latest release of SmartStream. |

Logon Credentials

To log on to the Infor Documentation Central, you must enter the user ID and password assigned to you when you select the manual that you want to review. If you do not have a user ID and password for the Infor Documentation Central, click the Sign up now link at the bottom of the page and complete the registration.

13 After Completing the Setup Process

Chapter Contents

| | |
|-------|---|
| 13-1 | Verifying the Installation of SmartStream |
| 13-3 | SmartStream |
| 13-6 | SmartStream Shared Components |
| 13-7 | Allocations |
| 13-8 | Asset Management |
| 13-9 | Billing |
| 13-10 | Budget |
| 13-12 | Consolidations |
| 13-13 | Funds Control |
| 13-14 | Human Capital Management |
| 13-15 | Ledger |
| 13-16 | Payables |
| 13-18 | Projects |
| 13-19 | Purchasing |
| 13-20 | Receivables |
| 13-21 | Receiving |
| 13-22 | Supplies Management |
| 13-23 | Before Going into Production |
| 13-28 | Implementing SmartStream |

Verifying the Installation of SmartStream

This chapter describes the tasks you complete to verify the SmartStream client workstations have connectivity and are functional. For more information about the tasks listed in this section and the activities you use to complete them, see the online Help.

Prerequisite

Before you perform the tasks in this chapter, you must install SmartStream as described in this guide. Use either education data or your own data to perform these tasks.

The DBMS configuration parameters used during installation are minimums set for installation only. You might need to change the configuration for testing activities and running SmartStream functions.

Sequence of Tasks

You must verify the installation of the SmartStream platform before verifying the installation for the SmartStream products. This includes setting up the poll configuration necessary for Job Server. The classes established for the Poll program are used for the SmartStream product installation verification.

Perform the tasks in the following order:

1. SmartStream
2. SmartStream Shared Components, if installed
3. Ledger, if installed

The post-installation tasks for the remaining products can be performed in any order.

SmartStream

- Start and log on to SmartStream and SmartStream Mail.
- Ensure that the SmartStream Browser displays the drawers that you can access. If you use predefined data, find the Home Drawer for DBS.
- Use the New Browser Objects activity to set up an agent rule list.
- Select the Agent icon to run the agent.

Open Analyzer

- Add a Cognos Impromptu catalog.
- Add a Cognos Impromptu report and query.
- Add and run an Open Analyzer definition.

Structures

- Use the Structures activity to open a previously added structure.

Job Server

- Use the Master Scheduler Configuration activity to define the Job Scheduler configuration.
- Use the Poll Configuration activity to define the configuration for the Poll.
- Use the Security Profile activity to define a security profile for the Job Scheduler.
- Run the Configuration program (pscc0030) from the directory where you installed Job Server to validate the information in the dbsched.ini file.
- On the Start menu, open the SmartStream Job Server 7.0 program group and click SmartStream Job Server Configuration.
- Start the Poll programs using the pscpoll.beg script for UNIX operating systems or by starting the service on Windows operating systems.

- Use the Job Scheduler activity to schedule a job.
- Use the View Server Queue activity and the Scheduler Log activity to examine the job you scheduled with Job Scheduler.
- Verify that you received the Job Results document in your mail after the job completed.

SmartStream Connect

- Verify the connection between the SmartStream Connect server and the host.
- Ensure that you have a SmartStream Connect activity list or Job Scheduler activity list containing the following activities: SmartStream Connect Download Request, SmartStream Connect Insert Request, SmartStream Connect Stored Procedure Request, SmartStream Connect Transaction Upload Request, or SmartStream Connect Host Job Submission Request.
- Use the Poll Configuration activity to validate that the proper communication settings are entered.
- Use the SmartStream Connect Download Request activity to create a request to download data from the host.
- Use the SmartStream Connect Insert Request activity to create a request that inserts data downloaded from the host into a database on the server.
- Use the SmartStream Connect Stored Procedure Request activity to create a request that extracts data from the database on the server.
- Use the SmartStream Connect Transaction Upload Request activity to create a SmartStream Connect Transaction upload request.
- Use the SmartStream Connect Host Job Submission Request activity to submit a job to the host that prints the uploaded data.
- Use the Security Profile activity to modify a security profile to include host-specific information.
- Use the Job Scheduler activity to create a job and schedule it to run.
- Examine the Job Results document in your mail after the job completes.
- Examine the output from the host job submission.

Formulas

These tasks set up and verify the installation of Formulas.

- Ensure that your activity list contains the following activity: Formulas.
- Use the Formulas activity to create formulas that can be used later within SmartStream Financials applications.

SmartStream Shared Components

- Start and log on to SmartStream.
- Use the New Browser Objects dialog box to set up activity lists to organize the information you intend to test. Ensure that you select the following Common activities if you have installed any SmartStream products: Enterprise Policy, Periodic Calendar Year, Rate Entry By Transaction Currency, Rate Delete Request Maintenance, Vendor Location.
- Use the Security Profile activity to define a security profile for a user.
- Use the Bank activity to
 - Open an existing bank
 - Display Help
 - Add a bank.
- Use the Rate Entry by Transaction Currency activity to
 - Add a rate
 - Display Help.
- Use the Rate Delete Request Maintenance activity to add a rate deletion request for the rate just entered.
- Use the Job Scheduler activity to start a scheduled rate deletion.
- Use the View Server Queue activity to track a scheduled rate deletion.
- Use the Scheduler Log activity to display the log for scheduled rate deletion.
- Use the Enterprise Policy activity to
 - Display the General View
 - Display Help.
- Use the Periodic Calendar Year activity to
 - Add a calendar year
 - Display Help.
- Use the Vendor Location activity to
 - Open an existing vendor location
 - Display Help.
- Use the Vendor Reporting activity to create a vendor list report.

Allocations

These tasks verify the installation of the following activities: Allocation Cycle Definition, Allocation Distribution Definition, Allocation Pool Definition, Allocation Request, Allocation Setup.

- Ensure these activities are included in an Activity List.
- Use the Allocation Pool Definition activity to
 - Select accounts for the allocation source pool
 - Display Help.
- Use the Allocation Distribution Definition activity to specify the accounting keys and amounts to distribute across the enterprise.
- Use the Allocation Cycle activity to specify how to build an allocation.
- Use the Allocation Request activity to add an allocation request.
- Use the Job Scheduler activity to run a scheduled allocation job.
- Use the View Server Queue activity to track the progress of the scheduled allocation job.
- Use the Scheduler Log activity to display the log for the scheduled allocation job.

Asset Management

These tasks verify the installation of the following activities: Assets, Asset Management Reporting, Asset Period Depreciation Controller.

- Ensure these activities are included in an Activity List.
- Use the Assets activity to
 - Open a previously added asset
 - Display field and Help
 - Add an asset.
- Use the Asset Period Depreciation Controllers activity to add a set to group books for depreciation processing.
- Use the Job Scheduler activity to start a scheduled period depreciation job for an asset.
- Use the View Server Queue activity to track a scheduled period depreciation job.
- Use the Scheduler Log activity to display the log for a scheduled period depreciation job.
- Use the Asset Management Reporting activity to create an Expense Ledger report.

Billing

These tasks verify the installation of the following activities: Billing Defaults, Billing Customer Defaults, Billing Accounting Distributions, Billing Document Print.

- Ensure these activities are included in an Activity List.
- Use the Billing Defaults activity to
 - Open previously defined billing defaults
 - Display Help.
- Use the Billing Defaults activity to add billing defaults for a receivable entity.
- Use the Billing Customer Defaults activity to
 - Change billing customer defaults
 - Display Help.
- Use the Billing Customer Defaults activity to add billing customer defaults for a receivable account and receivable entity combination.
- Use the Billing Accounting Distributions activity to
 - Display accounting distributions
 - Display Help.
- Use the Job Scheduler activity to start a scheduled billing document load job.
- Use the View Server Queue activity to track a scheduled billing document load job.
- Use the Scheduler Log activity to display the log for a scheduled billing document load job.
- Use the Billing Document Print activity to
 - Produce a draft version of a billing document
 - Display Help.

Budget

These tasks verify the installation of the following activities: Budget Entity Policy, Budget Entity Amount Class Types, Budget Validation Policy, Budget Chart of Accounts, Budget Balance, Budget Workbench Import Request, Budget Maintenance Request, Budget Workbench.

- Ensure these activities are included in an Activity List.
- Use the Budget Entity Policy activity to
 - Open a previously added budget entity
 - Add a new budget entity
 - Display Help.
- Use Budget Entity Amount Class Types activity to
 - Change an amount class type for a budget entity
 - Display Help.
- Use the Budget Validation Policy activity to
 - Access Validation
 - Display Help.
- Use the Budget Chart of Accounts activity to
 - Access a previously added account
 - Display Help
 - Add user dates and amounts.
 - Add an accounting distribution
- Use the Budget Balance activity to
 - Access a previously added balance
 - Display Help
 - Add a new balance.
- Use the Budget Workbench Import Request activity to
 - Add an import request
 - Display Help.
- Use the Budget Maintenance Request activity to
 - Open a previously added request
 - Display Help
 - Add a new request.

- Use the Workbench Data Access activity to
 - Import data to the workbench
 - Export data back from the workbench
 - Display Help.

- Use the Workbench Solo Change activity to
 - Display the variances between periods for two amount classes
 - Attach a note to your budget data
 - Display Help.

- Use the Workbench Group Change activity to
 - Spread amounts evenly across periods
 - Delete a note
 - Display Help.

Consolidations

These tasks verify the installation of the following activities: Consolidation Map, Consolidation Policy, Consolidation Chart of Account, Consolidation Journal Entry, Consolidation Trial Balance, Consolidation Elimination Request, Consolidation Request.

- Ensure these activities are included in an Activity List.
- Use the Consolidation Map activity to open a structure and view a consolidation structure.
- Use the Consolidation Policy activity to select the Date view and change the Prior Year value.
- Use the Consolidation COA activity to
 - Access a previously added account
 - Display Help
 - Change the account description.
- Use the Consolidation Journal Entry activity to add and post a journal.
- Use the Consolidation Trial Balance activity to
 - Retrieve balances for an existing entity
 - Filter the balance rows by account type
 - Replace a balance amount for one record.
- Use the Consolidation Elimination Request activity to
 - Access a previously added Request
 - Run the Elimination program from the window.
- Use the Consolidation Request activity to
 - Access a previously added Request
 - Run the Consolidation program from the window.

Funds Control

These tasks verify the installation of the following activities: Funds Control Policy, Funds Control Account Maintenance, Funds Control Structure Definition, Funds Control Reporting, Fund Control Workbench.

- Ensure these activities are included in an Activity List.
- Use the Funds Control Policy activity to
 - Open a previously added Funds Control Policy
 - Add a new Funds Control Policy
 - Display Help.
- Use the Funds Control Account Maintenance activity to
 - Open a previously added Fund Account
 - Add a Fund Account
 - Display Help.
- Use the Funds Control Structure Definition activity to
 - Open a previously added Structure Definition
 - Add a new Structure Definition.
- Use the Job Scheduler activity to start a scheduled Funds Control Rollup Structure Explosion.
- Use the View Server Queue activity to track the Funds Control Rollup Structure Explosion.
- Use the Scheduler Log activity to display the log for a scheduled Funds Control Rollup Structure Explosion.
- Use the Funds Control Reporting activity to
 - Run a Funds Control Distribution report
 - Display Reporting Help.
- Use the Funds Control Workbench activity to
 - View the Funds Control Rollup Structure
 - View the Funds Control Balances
 - View the Funds Control Exceptions.

Human Capital Management

These tasks verify the installation of the following activities: Employer, Employee Hire, Application, Employee Assignment, Employee Payment History, Participant Workbench.

- Ensure the user ID you use to perform the verification is part of the DBSSecurity group.
- Ensure these activities are included in an Activity List.
- Use the Employer activity to
 - View employer information for any employer
 - Display Help.
- Use the Employee Hire activity to add an employee.
- Use the Application activity to create and hire an applicant.
- Use the Employer Assignment activity to
 - View employee assignment information
 - Verify connection to SmartStream Structures.
- If Payroll is licensed, use the Employee Payment History activity to
 - View an employee's payment history
 - Display Help.
- If Benefits is licensed, use the Participant Workbench activity to
 - Add a participant to a plan without an eligibility rule
 - Add a plan option to that participant
 - Display Help.
- Copy the hrstrm32.accdb file from the file server to the c:\sstrm70 directory.
- Attach the Human Capital Management application tables in Microsoft Access.
- Run a sample EEO-1 report for Single Establishment 0714.

Ledger

These tasks verify the installation of the following activities: Chart of Accounts, Unposted Journals, Ledger Post Request, Ledger/Journal/Currency Reporting.

- Ensure these activities are included in an Activity List.
- Use the Chart of Accounts activity to
 - Open a previously added account
 - Display Help
 - Add an accounting distribution.
- Use the Unposted Journals activity to
 - Open a previously added unposted journal
 - Display Help
 - Add an unposted journal.
- Use the Ledger Post Request activity to add a posting request.
- Use the Job Scheduler activity to start a scheduled posting job.
- Use the View Server Queue activity to track a scheduled posting job.
- Use the Scheduler Log activity to display the log for a scheduled posting job.
- Use the Ledger/Journal/Currency Reporting activity to produce a Posted Journal Detail Report.

Before you access the subledgers, the security administrator must define security for the Subledger Documents activity (fgl9000).

- Use Activity Security activity to assign the Subledger Documents activity.
- Use the Ledger Security Data Control activity to set up data security for the Subledger Documents activity.

Payables

These tasks verify the installation of the following activities: Payment Method, Available Payment Reference Numbers, Vendor Master, Vendor Payables Information, Invoice, Matching Exception Details, Payment Control, Payment Link to Access, Bank Clearance, Payables Balancing Report Parameters.

- Ensure these activities are included in an Activity List.
- Use the Payment Method activity to
 - Add a payment method
 - Display Help.
- Use the Available Payment Reference Number activity to
 - Add payment reference numbers
 - Display Help.
- Use the Vendor Master activity to
 - Add a vendor
 - Display Help.
- Use the Vendor Payables Information activity to
 - Change a vendor
 - Display Help.
- Use the Invoice activity to add an invoice with comments.
- Use the Invoice activity to add a matched invoice.
- Use the Job Scheduler activity to start a scheduled matching process.
- Use the Matching Exception Details activity to
 - Review a matching exception
 - Display Help.
- Use the Payment Control activity to
 - Set up a payment control
 - Display Help.
- Use the Job Scheduler activity to start a scheduled payment run.
- Use the View Server Queue activity to track scheduled payment processing.
- Use the Scheduler Log activity to display a scheduler payment run log.

- Use the To Do Lists folder on the SmartStream desktop to access a To Do to print a payment.
- Use the Bank Clearance activity to
 - Clear a payment
 - Display Help.
- Use the Payables Balancing Reports activity to create a summary balancing report for Payables.

Projects

Perform the following tasks using the delivered education data to test the installation of Projects.

These tasks verify the installation of the following activities: Projects, Structures, Component.

- Use the Projects activity to
 - Open a previously added project
 - Display field-level help
 - Add a new project
 - Navigate to Structures.
- Use the Structures activity to add a summary and data point.
- Use the Component activity to open a file and select one of the new components.

Purchasing

Use the following site when you are testing Purchasing in an environment with procurement activities only: **US99**. Do not test with any of the other delivered sites. You can also set up your own test sites.

These tasks verify the installation of the following activities: Requester, Buyer, Assign Commodities to Buyer, Requisition, Purchase Order, Select Purchase Order to Send, Purchasing Reports.

- Start and log on to SmartStream.
- Ensure these activities are included in an Activity List.
- Use the Requester activity to
 - Add a requester
 - Display Help.
- Use the Buyer activity to
 - Add a buyer
 - Display Help.
- Use the Assign Commodities to Buyer activity to
 - Assign a purchase commodity
 - Display Help.
- Use the Requisition activity to add a requisition.
- Use the Purchase Order activity to add a purchase order.
- Use the Select Purchase Order to Send activity to send a purchase order.
- Use the Security Profile activity to add a security profile.
- Use the Job Scheduler activity to
 - Create a scheduled purchase order send
 - Run a scheduled PO Extract.
- Use the Purchasing Reports activity to print a purchase order.

Receivables

These tasks verify the installation of the following activities: SmartStream Preferences, Credit Account, Receivable Account, Receivable Entity Accounting Distributions, Receivable Account Totals, Receivable Draft.

- Ensure these activities are included in an Activity List.
- Select Preferences from the File menu on the SmartStream window to verify Receivables preferences.
- Use the Credit Account activity to
 - Open a previously added credit account
 - Display Help.
- Use the Credit Account activity to add a credit account.
- Use the Receivable Account activity to
 - Change a receivable account
 - Display Help.
- Use the Receivable Account activity to add a receivable account.
- Use the Receivable Entity Accounting Distributions activity to
 - Display accounting distributions
 - Display Help.
- Use the Job Scheduler activity to start a scheduled receivable aging job.
- Use the View Server Queue activity to track a scheduled receivable aging job.
- Use the Scheduler Log activity to display the log for a scheduled receivable aging job.
- Use the Receivable Account Totals activity to
 - Produce a report
 - Display Help.
- Use the Receivable Draft activity to open an existing receivable draft.

Receiving

After successfully completing the Purchasing post-installation tasks, use a purchase order that you created to complete these tasks.

- Use the Receipt activity to receive the full order quantity and place some portion of that quantity in the quantity to disposition.
- Use the Receipt Maintenance activity to receive an additional unit for the receipt added in the previous step.
- Use the Receipt Exceptions activity to disposition the quantity for the receipt id as Return to Vendor.
- Use the Next Step to the Returns activity and complete the return created in the previous step.
- Use the Receipt Inquiry activity to display the current details of the receipt.
- Use the Unidentified Receipt activity to add a receipt.
- Display Help.

Supplies Management

After completing the Purchasing installation test, perform the tasks in this section to verify the installation of Supplies Management.

- Use the Site activity to choose Site US99 as a purchase site and change it.
- Use the Next Available Number activity to set up the next available number for requisitions and kit orders.
- Use the Stockroom activity to add a new stockroom to Site US99.
- Use the Activity Security activity to add group security for the new stockroom in Site US99.
- Use the Item activity to add an item with a usage code of Stocked, and associate it with Site US99.
- Use the Stockroom Item activity to add the item to Site US99 in your new stockroom. Do not change the default for Replenished from Vendor. Add a minimum quantity of 1000 and a maximum quantity of 10,000.
- Use the Stockroom Bin Location activity to add a new bin in the new stockroom.
- Use the Item Bin Location activity to associate the new bin with the item you defined.
- Use the Inventory Adjustment activity to adjust the quantity in the bin for the item to 500.
- Use the Requisition activity to create an approved requisition for the stocked item.
- Use Job Scheduler to run the Batch Reservation activity for your site or stockroom.
- Use the Inventory Inquiry activity to observe the reserved quantity of the stocked item.
- Use the Requisition activity to go to the Line view and observe the reserved quantity of the requisition.
- Use the Print Picklist activity to print the picklist for the requisition added.
- Use Job Scheduler to run the Batch Replenishment activity, and then run the Requisition Load scheduled process for the site or stockroom.
- Use the Replenishment Requisition activity to choose Open from the File menu to find the replenishment requisition for the item.

Before Going into Production

Perform the following tasks before going into production. Also, be sure to update your environment information on the Infor Concierge.

Adjusting Database Server Configurations for Testing and Production

The parameters you set during the installation process are adequate for installing SmartStream successfully. However, before starting testing and production, determine if these settings are adequate for your environment and increase the settings that are too low for your environment.

Running the budent32.exe Program for SmartStream Budget

Before SmartStream Budget users go into production, run the budent32.exe program. This program

- Customizes the budget.ini file
- Tailors the Workbench (budget.exe)

When to Run budent32.exe

The system administrator runs the budent32.exe program at the following time:

- After SmartStream Budget is installed on the database server
- After Enterprise Policy is established
- Before users install the Workbench on their workstation

Running budent32.exe

Run the budent32.exe program in *drive:\ss\enterprz*, where *drive:* is the location where SmartStream is installed on your file server.

Clearing Tables

Before going into production, clear the education data from the SmartStream tables by running the table initialization program.

| Was SmartStream Installed Before? | When to Run This Program |
|-----------------------------------|--|
| Yes | During the migration process. See the SmartStream Migration Guide. |
| No | Before tailoring the user-defined accounting key and before going into production. |

Illustrated Procedure

To see a procedure for this task with pictures of the appropriate installation windows, go to [Initializing Tables](#) in Chapter 14, Installation-Migration Checklists with Illustrated Procedures.

Tailoring the Accounting Key

After clearing the tables, tailor your accounting key by running the User-Defined Accounting Key program.

| Was SmartStream Installed Before? | When to Run This Program |
|-----------------------------------|--|
| Yes | During the migration process. See the <i>SmartStream Migration Guide</i> . |
| No | Before going into production. |

For more information about planning and configuring your user-defined accounting key, see

- The Planning Your User-Defined Accounting Key chapter in the *Enterprise Accounting* guide
- The Configuring Your Accounting Key chapter in the *Shared Components Technical Reference*.

Preparing the Reporting Databases for Use

SmartStream provides a utility, the Access Database Toolkit (AccessToolkit.accdb), that can automatically perform the following processing on selected Access databases used for reporting:

- Convert the delivered accounting key to the user-defined accounting key as needed
- Copy updated reporting objects from an update Access database replacing the objects in the corresponding application Access database
- Attach tables

The Access Database Toolkit resides in the `\utility\mdbtikit` directory of the SmartStream file server and can be installed anywhere on the SmartStream client. It has two operating modes:

- File Server (default) - all processing is run directly on the file server.
- Local - all processing is run locally on the SmartStream client.

Prerequisites

A SmartStream client must be installed on the workstation where you plan to run the Access Database Toolkit. This workstation must also have ODBC connectivity to the SmartStream database server.

When the toolkit is run in File Server mode, the workstation running it must have the SmartStream file server mapped to a drive, and the user must have read/write access to that drive.

Ensure that the workstation running the toolkit will not be used for any other processing during the apply process.

Procedure

Using the Access Database Toolkit, the SmartStream Administrator performs the following procedure on the file server copies of the Access databases (File Server mode). Updating the copy of an Access database on the file server ensures that all new client installations copy the updated version of that Access database.

Also, unless the Change Date option (see Step 9) is used, all SmartStream users who have already installed their SmartStream client must perform the following procedure to update their local copies of the Access databases (Local mode). Any updated Access databases are copied to the client workstation by the refresh process.

To prepare reporting databases for use, complete this procedure:

| Step | Action |
|------|--|
| 1 | Double-click AccessToolkit.accdb in the directory where it was installed. Result: The SQL Server Logon prompt appears. |
| 2 | Enter your logon information and click OK. Result: The toolkit scans the file server or local directory to retrieve all available Access databases and then displays the Access Database Toolkit window. The database server that the local client points to is displayed in the Database server field and cannot be changed. |
| 3 | In the Source Directory fields, select whether the source Access databases are on the file server or in another location, verify the default path, and change as needed. |
| 4 | In the Destination Directory fields, select whether you want the processed Access databases copied to a directory on the file server or in another location, verify the default path, and change as needed. |
| 5 | In the Patches fields Clear the Process check box unless SmartStream updates have been applied . In that case, accept the default if you want to use update Access databases to update target Access databases. After applying updates, if you are running the toolkit in file server mode and want updated Access databases to be copied to the patch directory as well as the lss directory on the file server, accept the default Copy to file server patch directory option. |
| 6 | In the UDAK fields, if you want to convert the delivered accounting key to the user-defined accounting key, accept the default Process option and select the appropriate language. |
| 7 | In the Tables and Passthrough Queries fields, if you want to attach tables to the Access databases and update the connect string of the passthrough queries, accept the default Process option and type of processing (Attach/Connect). Security Considerations: If you are running the toolkit in file server mode and accept the default options in these fields, all SmartStream users using the processed Access databases can run any report without providing logon credentials. For more information about reporting security, see Financials Reporting chapter in the <i>Financials Technical Reference</i> . |

| Step | Action |
|-------------|--|
| 8 | <p>If you want to create backup files of the Access databases you plan to process, accept the default Create backups option and enter the path to the directory where you want them created.</p> <p>Note: If you select the Create backups option, the target Access database is copied to a file using a .001 extension, which is increased by one each time the Access database is backed up. This option requires disk space on the file server twice the size of the selected Access database. The .001 file is placed in the same directory as the target Access database.</p> |
| 9 | <p>If you want the toolkit to assign a date other than the current date to the Access databases processed, for example, a future date to ensure that the file server copy of processed Access databases will be copied to the client during the refresh process, select the Change Date option, click the button beside the text box, and select the appropriate date using the calendar utility.</p> <p>Note: The Patch_Enable setting in the dbserver.ini file must be set to 1 to activate the refresh process.</p> |
| 10 | <p>Select the name or the Selected check box for each Access database you want to process. You can also use the Select All button to make your selections.</p> <p>If SmartStream updates have been applied and you select an update Access database with prerequisites, the toolkit automatically selects all of its prerequisites as well.</p> <p>If you select a database for processing that it does not need, the toolkit displays a message that the selected processing does not apply to the database.</p> <p>Note: Update and target Access databases are specified in the MS Access Corrections section of the document describing the applicable update deliverable for each product.</p> |
| 11 | <p>Click Apply.</p> <p>Result: The Access Database Toolkit - Log window appears. All task performed and any errors encountered scroll on the window. After processing finishes, you can double-click a line to display details for it.</p> |
| 12 | <p>Click Close to close the log window. Then click Exit to close the toolkit.</p> <p>Note: You can print a text version of the log, which is saved in the destination directory.</p> |
| 13 | <p>If you customized reporting objects, compare the updated reporting objects with the objects in the backup Access database and make the customizations again.</p> |

Verifying Depreciation Amounts in SmartStream Asset Management

Before going into production with Asset Management, you might want to load your assets onto a test server and process a few years using the following procedure to verify that SmartStream calculates the depreciation amounts that you expect.

| Step | Action |
|-------------|---|
| 1 | Run the depreciation scheduled process for the rest of the current year. |
| 2 | Run the year end scheduled process. |
| 3 | Run the depreciation scheduled process again for all periods in the new year. |

This is especially advisable when your enterprise overrides some of the calculated amounts because overriding amounts can affect future calculations.

Implementing SmartStream

Each SmartStream product requires some post-installation setup. See the SmartStream Library for information about

- Technical implementation
- Maintenance considerations
- Policy set up
- Other product implementation considerations.

14 Installation-Migration Checklists with Illustrated Procedures

Chapter Contents

| | |
|--------|---|
| 14-1 | About the Installation-Migration Checklists |
| 14-3 | Installation Checklist |
| 14-9 | Migration Checklist |
| 14-16 | Upgrade in Place Checklist |
| 14-22 | Setting Up the File Server |
| 14-27 | Preparing the Sybase Database Server |
| 14-29 | Creating and Loading Databases for SmartStream Products |
| 14-38 | Loading SmartStream Language Kits |
| 14-42 | Initializing Tables |
| 14-46 | Installing SmartStream Clients |
| 14-49 | Configuring Your User-Defined Accounting Key (UDAK) |
| 14-56 | Running the Migration Program |
| 14-63 | Running the Upgrade in Place Program |
| 14-66 | Loading Databases for Newly Licensed Products |
| 14-70 | Reloading SmartStream Language Kits |
| 14-74 | Processing the Architecture Tables in Special Mode |
| 14-77 | Regenerating the Runtime Library |
| 14-83 | Installing the Job Server |
| 14-93 | Installing SmartStream Connect |
| 14-95 | Installing the Mail Gateway |
| 14-102 | Setting Up ALLTAX and Payroll Regulatory Reporting |
| 14-103 | Configuring Master Scheduler, Poll, and ARPC |
| 14-108 | Performing Post-Installation Tasks |

About the Installation-Migration Checklists

These checklists are **high-level overviews** of the installation and migration processes. They are designed for SmartStream installers who are very familiar with the supported version of

- Microsoft SQL Server or Sybase Adaptive Server Enterprise
- Microsoft SQL Server Client or Sybase PC Client
- Windows workstation

- SmartStream products
- Windows or UNIX server
- Their mail software product.

For each task, the checklists provide links to a procedure with pictures of the corresponding installation or migration windows. They also provide references to information to help you

- Make decisions about setting up or upgrading SmartStream to meet the requirements of your business
- Resolve any problems you encounter.

Before You Begin

Be sure to review the appropriate chapters of the applicable guides for changes and new information so that you can make informed decisions about how to install or upgrade SmartStream to meet the requirements of your business.

Installation Checklist

Be sure to review the appropriate chapters of the *Installation Guide* for changes to and new information about the installation process.

This checklist is provided so that you can check off the appropriate tasks as you complete them. It is not intended to take the place of the detailed instructions provided earlier in this guide. If you use it as such, you will encounter problems with the installation process.

□ Task 1 (Required)

Access the latest installation information on the Infor Concierge

- Download the appropriate planning document for SmartStream 8.0
SmartStream/SmartStream 8.0/Planning Documents/Planning Document for...
- Download the Installation Guide for SmartStream 8.0
SmartStream/SmartStream 8.0/Installation/Installation Guide
- Visit the Knowledge Base on the Infor Concierge and print these articles:
 - Critical Issues
 - Supported Technical Environments

For More Information: *Installation Guide*, Chapter 2, Preparing the Environment.

□ Task 2 (Required)

Prepare your environment

- Prepare the installation workstation
- Install Sybase Adaptive Server or Microsoft SQL Server
- Install Sybase PC Client or Microsoft Client
- Install the Sybase or Microsoft ODBC drivers

For More Information: *Installation Guide*, Chapter 2, Preparing the Environment.

□ Task 3 (Required)

Run the File Server Setup program (copy files from CD or installation image to file server)

- Run *CD or installation image drive:\DBS\InstMgr\Install\setup.exe*
- Run *SmartStream Builder CD or installation image drive:\strmbldr\InstMgr\Install\setup.exe*

For More Information:

- [Setting Up the File Server](#)
- *Installation Guide*, Chapter 3, Preparing and Installing the File Server

□ Task 4 (Required)

Configure the audit user ID and password

- Run **ss\pltaudt.exe** to designate a valid audit user ID and password for the database server

For More Information: *Installation Guide*, Chapter 3, Preparing and Installing the File Server, Post-Installation Task for SmartStream

□ Task 5 (Required only if you use Sybase Adaptive Server Enterprise as your database management system)

Prepare your Sybase database server

- Run *drive:\directory\utility***dbsprep.exe** to run the Database Preparation program that configures Sybase to work with SmartStream

Note: The variables *drive:\directory* represent the location where SmartStream is installed on the file server.

For More Information:

- [Preparing the Sybase Database Server](#)
- *Installation Guide*, Chapter 4, Preparing the Sybase Database Server

□ Task 6 (Required)

Run the Database Create and Load program (from newly created file server image)

- Run *drive:\directory***CREATELD\setup.exe** to create databases
- **For Microsoft SQL Server**, run **ldbmsldbtool.exe** and choose **Microsoft SQL Server *version* - Install Default Instance** or **Microsoft SQL Server *version* - Install Named Instance** from the Operation drop-down list, where *version* is your version of Microsoft SQL Server.
- Run *drive:\directory***CREATELD\setup.exe** to load databases

For More Information:

- [Creating and Loading Databases](#)
- *Installation Guide*, Chapter 6, Installing SmartStream Products on the Database Server

□ **Task 7 (Complete only if you have licensed language kits)**

Load SmartStream language kits

For More Information:

- [Loading SmartStream Language Kits](#)
- *Installation Guide*, Chapter 6, Installing SmartStream Products on the Database Server

□ **Task 8 (Complete only if you loaded education data and want to remove it)**

Run the Table Initialization program

- Run `\dbms\setup.exe` to clear tables and load minimum required data into them

For More Information:

- [Initializing Tables](#)
- *Installation Guide*, Before Going into Production in Chapter 13, After Completing the Setup Process

□ **Task 9 (Optional)**

Install the SmartStream clients (from file server image)

- Prepare the SmartStream client workstation
- Install SmartStream client `\sslsetup.exe /a`
- Reboot the workstation

For More Information:

- [Installing SmartStream Clients](#)
- *Installation Guide*, Chapter 7, Preparing the SmartStream Client Workstations
- *Installation Guide*, Chapter 8, Installing SmartStream Products on the Client Workstations

□ **Task 10 (Complete only if you tailor your accounting key)**

Run `udak.exe` and compile utility `setup.exe` to tailor your accounting key

- Run `\dbms\udak\udak.exe` to tailor your accounting key (first run for All Products except Consolidations)
- Run `\dbms\udak\udak.exe` (second run for Consolidations **if currently licensed**)
- Run `\dbms\udak\setup.exe` to compile your accounting key

For More Information:

- [Configuring Your User-Defined Accounting Key](#)
- *Migration Guide or Upgrade in Place*, Chapter 3, Tailoring Your Accounting Key
- For more information about planning and configuring your user-defined accounting key, see
 - Planning Your User-Defined Accounting Key in the *Enterprise Accounting* guide
 - Configuring Your Accounting Key in the *Shared Components Technical Reference*.

□ Task 11 (Complete only if you tailor your accounting key)

Regenerate the udak.pdb

- Using PowerBuilder, regenerate \ss\udak.pbl as udak.pdb

For More Information:

- [Regenerating the Dynamic Runtime Library](#)
- *Migration Guide or Upgrade in Place*, Chapter 3, Tailoring Your Accounting Key

□ Task 12 (Required)

Install Job Server.

For a Windows environment,

Run `\batch\NTINTEL\setup.exe` for Microsoft SQL Server or Sybase

For Sybase in a UNIX environment only

Run `\batch\os\setup.exe`

Where `os` is HP, AIX, or SUN (depending on your UNIX platform)

For More Information:

- [Installing the Job Server](#)
- *Installation Guide*, Chapter 10, Installing Job Server

□ Task 13 (Optional)

Install SmartStream Connect

For More Information:

- [Installing SmartStream Connect](#)
- *Installation Guide*, Chapter 11, Installing SmartStream Connect

□ Task 14 (Required)

Install Mail Gateway

- Run **setup.exe** from the **\mailgate** directory on the SmartStream file server.

For More Information:

- [Installing the Mail Gateway](#)
- *Installation Guide*, Chapter 9, Installing SmartStream Mail Gateway

□ Task 15 (Complete only if you are installing SmartStream Payroll)

Complete the ALLTAX and Payroll regulatory reporting setup

- Define user variables using the System utility from Control Panel
 - alltax2\taxdata\taxref\at001ref
 - alltax2\taxdata\taxsrc\at001clc
 - On UNIX computers, confirm environment variables are in .profile
- Add printer to local machine
- Run **hralltax.bat** from batch directory
- Define ODBC settings for Sybase and Microsoft SQL Server using the ODBC Data Source Administrator utility from Control Panel
- Apply format control records
- Use a SQL editor to add printer names to the printer_id_tbl table in the DBShrpn database

For More Information:

- [Setting Up ALLTAX and Payroll Regulatory Reporting](#)
- *Payroll Technical Reference*
 - Chapter 1, Payroll Technical Implementation
 - Chapter 8, Regulatory Reporting

□ Task 16 (Required)

Configure Master Scheduler, Poll, and ARPC

- Using SmartStream, configure Master Scheduler, Poll, and ARPC
- **For SmartStream Human Capital Management (HCM) only**, create a shortcut on Windows workstations on the desktop for Poll.
- In a Windows environment, using the Services utility from the Administrative Tools utility in Control Panel, change the startup type for SmartStream Master Scheduler, Poll, and ARPC to **Automatic**, and then start them.

For More Information:

- [Configuring Master Scheduler, Poll and ARPC](#)
- *Installation Guide*, Chapter 10, Installing Job Server



Task 17 (Required)

Perform post-installation tasks appropriate to your SmartStream environment.

For More Information:

- [Performing Post-Installation Tasks](#)
- *Installation Guide*, Chapter 13, After Completing the Setup Process

Migration Checklist

Be sure to review the appropriate chapters of the *Installation Guide* and the *Migration Guide* for changes to and new information about the migration process.

This checklist is provided so that you can check off the appropriate tasks as you complete them. It is not intended to take the place of the detailed instructions provided earlier in this guide or in the *Migration Guide*. If you use it as such, you will encounter problems with the migration process.

□ Task 1 (Required)

Access the latest installation information on the Infor Concierge

- Download the appropriate planning document for SmartStream 8.0
SmartStream/SmartStream 8.0/Planning Documents/Planning Document for...
- Download the Installation Guide for SmartStream 8.0
SmartStream/SmartStream 8.0/Installation/Installation Guide
- Download the Migration guide for SmartStream 8.0
SmartStream/SmartStream 8.0/Installation/Migration Guide
- Visit the Knowledge Base (KB) on the Infor Concierge and print these articles:
 - Critical Issues
 - Supported Technical Environments

Note: Be sure to apply critical updates before performing the corresponding task; for example, if an update affects migration, apply it before you migrate your data.

For More Information: *Installation Guide*, Chapter 2, Preparing the Environment

□ Task 2 (Required)

Prepare your environment

- Prepare the installation workstation
- Install the new version of Sybase Adaptive Server or Microsoft SQL Server
- Install the new version of Sybase PC Client or Microsoft Client
- Install the new version of Sybase or Microsoft ODBC drivers

For More Information: *Installation Guide*, Chapter 2, Preparing the Environment

□ **Task 3 (Required)**

Run the File Server Setup program (copy files from CD or installation image to file server)

- Run *CD or installation image drive:\DBS\InstMgr\Install\setup.exe*
- Run SmartStream Builder *CD or installation image drive:\strmbldr\InstMgr\Install\setup.exe*

For More Information:

- [Setting Up the File Server](#)
- *Installation Guide*, Chapter 3, Preparing and Installing the File Server

□ **Task 4 (Required)**

Configure the audit user ID and password

- Run **ss\pltaudt.exe** to designate a valid audit user ID and password for the database server

For More Information: *Installation Guide*, Chapter 3, Preparing and Installing the File Server, Post-Installation Task for SmartStream

□ **Task 5 (Required only if you use Sybase Adaptive Server Enterprise as your database management system)**

Prepare your Sybase database server

- Run *drive:\directory\utility\dbsprep.exe* to run the Database Preparation program that configures Sybase to work with SmartStream

Note: The variables *drive:\directory* represent the location where SmartStream is installed on the file server.

For More Information:

- [Preparing the Sybase Database Server](#)
- *Installation Guide*, Chapter 4, Preparing the Sybase Database Server

□ Task 6 (Required)

Run the Database Create and Load program (from newly created file server image)

- Run *drive:\directory\CREATELD\setup.exe* to create databases
- **For Microsoft SQL Server**, run *\dbms\ldbtool.exe* and choose **Microsoft SQL Server *version* - Install Default Instance** or **Microsoft SQL Server *version* - Install Named Instance** from the Operation drop-down list, where *version* is your version of Microsoft SQL Server.
- Run *drive:\directory\CREATELD\setup.exe* to load databases

For More Information:

- [Creating and Loading Databases](#)
- *Installation Guide*, Chapter 6, Installing SmartStream Products on the Database Server

□ Task 7 (Complete only if you have licensed language kits)

Load SmartStream language kits

For More Information:

- [Loading SmartStream Language Kits](#)
- *Installation Guide*, Chapter 6, Installing SmartStream Products on the Database Server

□ Task 8 (Complete only if you loaded education data and want to remove it)

Run the Table Initialization program

- Run *\dbms\setup.exe* to clear tables and load minimum required data into them

For More Information:

- [Initializing Tables](#)
- *Installation Guide*, Before Going into Production in Chapter 13, After Completing the Setup Process

□ Task 9 (Complete only if you tailor your accounting key)

On your SmartStream file server, copy the *udak.ini* file from the **dbms\udak** directory for your current version of SmartStream to the **dbms\udak** directory for the new version of SmartStream.

Run `udak.exe` and compile utility `setup.exe` to tailor your accounting key

- Run `\dbms\udak\udak.exe` to tailor your accounting key (first run for All Products except Consolidations)
- Run `\dbms\udak\udak.exe` (second run for Consolidations **if currently licensed**)
- Run `\dbms\udak\udak.exe` (third run for newly licensed products)
- Run `\dbms\udak\udak.exe` (fourth run for Consolidations if newly licensed)
- Run `\dbms\udak\setup.exe` to compile your accounting key

For More Information:

- [Configuring Your User-Defined Accounting Key](#)
- *Migration Guide*, Chapter 3, Tailoring Your Accounting Key
- For more information about planning and configuring your user-defined accounting key, see
 - Planning Your User-Defined Accounting Key in the *Enterprise Accounting* guide
 - Configuring Your Accounting Key in the *Shared Components Technical Reference*.

□ **Task 10 (Complete only if you tailor your accounting key)**

Regenerate the `udak.pbd`

- Using PowerBuilder, regenerate `\ss\udak.pbl` as `udak.pbd`

For More Information:

- [Regenerating the Dynamic Runtime Library](#)
- *Migration Guide*, Chapter 3, Tailoring Your Accounting Key

□ **Task 11 (Required)**

Install Job Server.

For a Windows environment,

Run `\batch\NTINTEL\setup.exe` for Microsoft SQL Server or Sybase

For Sybase in a UNIX environment only

Run `\batch\os\setup.exe`

Where `os` is HP, AIX, or SUN (depending on your UNIX platform)

For More Information:

- [Installing the Job Server](#)
- *Installation Guide*, Chapter 10, Installing Job Server

□ Task 12 (Required)

Run the Migration Export and Import program to migrate your SmartStream data to the new release

- Run `\dbms\smartmig\setup.exe` (first run for migration export)
- Run `\dbms\smartmig\setup.exe` (second run for migration import)

For More Information:

- [Running the Migration Program](#)
- *Migration Guide*

□ Task 13 (Complete only if you are adding newly licensed products)

Load databases for newly licensed products (no education data)

- Run `\CREATELD\setup.exe`

For More Information:

- [Loading Databases for Newly Licensed Products](#)
- *Installation Guide*, Chapter 6, Installing SmartStream Products on the Database Server

□ Task 14 (Complete only if you have licensed and installed language kits)

Reload your SmartStream language kits

For More Information:

- [Reloading SmartStream Language Kits](#)
- *Migration Guide*, Chapter 6, Completing the Migration Process

□ Task 15 (Complete only if you tailor your accounting key)

Run `udak.exe` on architecture tables in Special mode

- Run `\dbms\udak\udak.exe` (first run in Special Mode, Architecture Tables for All Products)
- Run `\dbms\udak\udak.exe` (second run in Special Mode, Architecture Tables for Consolidations)

For More Information:

- [Processing the Architecture Tables in Special Mode](#)
- *Migration Guide*, Chapter 3, Tailoring Your Accounting Key

□ **Task 16 (Optional)**

Reinstall SmartStream Connect

For More Information:

- [Installing SmartStream Connect](#)
- *Installation Guide*, Chapter 11, Installing SmartStream Connect

□ **Task 17 (Required)**

Reinstall Mail Gateway

- Run setup.exe from the **\mailgate** directory on the SmartStream file server.

For More Information:

- [Installing the Mail Gateway](#)
- *Installation Guide*, Chapter 9, Installing SmartStream Mail Gateway

□ **Task 18 (Required)**

Reinstall your SmartStream client workstations (from file server image)

- Uninstall previous version of SmartStream client
- Prepare the SmartStream Client workstation
- Install SmartStream client **\sslsetup.exe /a**
- Reboot the workstation

For More Information:

- [Installing SmartStream Clients](#)
- *Installation Guide*, Chapter 7, Preparing the SmartStream Client Workstations
- *Installation Guide*, Chapter 8, Installing SmartStream Products on the Client Workstations

□ **Task 19 (Complete only if you are installing SmartStream Payroll)**

Complete the ALLTAX and Payroll regulatory reporting setup

- Define user variables using the System utility from Control Panel
 - alltax2\taxdata\taxref\at001ref
 - alltax2\taxdata\taxsrc\at001clc
 - On UNIX machines, confirm environment variables are in .profile
- Add printer to local machine
- Run **hralltax.bat** from batch directory
- Define ODBC settings for Sybase and Microsoft SQL Server using the ODBC Data Source Administrator utility from Control Panel
- Apply format control records
- Use a SQL editor to add printer names to the printer_id_tbl table in the DBShrpn database

For More Information:

- [Setting Up ALLTAX and Payroll Regulatory Reporting](#)
- *Payroll Technical Reference*
 - Chapter 1, Payroll Technical Implementation
 - Chapter 8, Regulatory Reporting

□ **Task 20 (Required)**

Configure Master Scheduler, Poll, and ARPC

- Using SmartStream, configure Master Scheduler, Poll, and ARPC
- **For SmartStream Human Capital Management (HCM) only**, create a shortcut on Windows workstations on the desktop for Poll.
- In a Windows environment, using the Services utility from the Administrative Tools utility in Control Panel, change the startup type for SmartStream Master Scheduler, Poll, and ARPC to **Automatic**, and then start them.

For More Information:

- [Configuring Master Scheduler, Poll and ARPC](#)
- *Installation Guide*, Chapter 10, Installing Job Server

Upgrade in Place Checklist

Be sure to review the appropriate chapters of the *Installation Guide* and the *Upgrade in Place* guide for changes to and new information about the upgrade in place process.

This checklist is provided so that you can check off the appropriate tasks as you complete them. It is not intended to take the place of the detailed instructions provided earlier in this guide or in the *Upgrade in Place* guide. If you use it as such, you will encounter problems with the upgrade in place process.

□ Task 1 (Required)

Access the latest installation information on the Infor Concierge

- Download the appropriate planning document for SmartStream 8.0
SmartStream/SmartStream 8.0/Planning Documents/Planning Document for...
- Download the Installation Guide for SmartStream 8.0
SmartStream/SmartStream 8.0/Installation/Installation Guide
- Download the Migration guide for SmartStream 8.0
SmartStream/SmartStream 8.0/Installation/Migration Guide
- Visit the Knowledge Base on the Infor Concierge and print these articles:
 - Critical Issues
 - Supported Technical Environments

Note: Be sure to apply critical updates before performing the corresponding task; for example, if an update affects migration, apply it before you migrate your data.

For More Information: *Installation Guide*, Chapter 2, Preparing the Environment

□ Task 2 (Required)

Prepare your environment

- Prepare the installation workstation
- Install the new version of Sybase Adaptive Server or Microsoft SQL Server
- Install the new version of Sybase PC Client or Microsoft Client
- Install the new version of Sybase or Microsoft ODBC drivers

For More Information: *Installation Guide*, Chapter 2, Preparing the Environment

□ Task 3 (Required)

Run the File Server Setup program (copy files from CD or installation image to file server)

- Run *CD or installation image drive:\DBS\InstMgr\Install\setup.exe*
- Run SmartStream Builder *CD or installation image drive:\strmbldr\InstMgr\Install\setup.exe*

For More Information:

- [Setting Up the File Server](#)
- *Installation Guide*, Chapter 3, Preparing and Installing the File Server

□ Task 4 (Required)

Configure the audit user ID and password

- Run **ss\pltaudt.exe** to designate a valid audit user ID and password for the database server

For More Information: *Installation Guide*, Chapter 3, Preparing and Installing the File Server, Post-Installation Task for SmartStream

□ Task 5 (Required)

Update your new (SmartStream 8.0) file server:

- Copy the **\instenv** directory from your current file server to your new file server.
- Remove the **\upgrade** directory from the **\instenv\envx** directory on your new file server, if applicable.
- Change the **Server** setting in the **dbserver.ini** file in the SmartStream directory of your new file server to point your database server.

For More Information: *Upgrade in Place*, Chapter 2, Preparing for Upgrade

□ Task 6 (Complete only if you have licensed language kits)

Load SmartStream language kits

For More Information:

- [Loading SmartStream Language Kits](#)
- *Installation Guide*, Chapter 6, Installing SmartStream Products on the Database Server

□ **Task 7 (Complete only if you tailor your accounting key)**

On your SmartStream file server, copy the udak.ini file from the **dbms\udak** directory for your current version of SmartStream to the **dbms\udak** directory for the new version of SmartStream.

Run udak.exe to tailor your accounting key

- Run **\\dbms\udak\udak.exe** to tailor your accounting key (first run for All Products except Consolidations)
- Run **\\dbms\udak\udak.exe** (second run for Consolidations **if currently licensed**)
- Run **\\dbms\udak\udak.exe** (third run for newly licensed products)
- Run **\\dbms\udak\udak.exe** (fourth run for Consolidations if newly licensed)

For More Information:

- [Configuring Your User-Defined Accounting Key](#)
- *Upgrade in Place*, Chapter 3, Tailoring Your Accounting Key
- For more information about planning and configuring your user-defined accounting key, see
 - Planning Your User-Defined Accounting Key in the *Enterprise Accounting* guide
 - Configuring Your Accounting Key in the *Shared Components Technical Reference*.

□ **Task 8 (Complete only if you tailor your accounting key)**

Regenerate the udak.pbd

- Using PowerBuilder, regenerate **\\ss\udak.pbl** as **udak.pbd**

For More Information:

- [Regenerating the Dynamic Runtime Library](#)
- *Upgrade in Place*, Chapter 3, Tailoring Your Accounting Key

□ **Task 9 (Required)**

Install Job Server.

For a Windows environment,

Run **\\batch\NTINTEL\setup.exe** for Microsoft SQL Server or Sybase

For Sybase in a UNIX environment only

Run `\batch\os\setup.exe`

Where *os* is HP, AIX, or SUN (depending on your UNIX platform)

For More Information:

- [Installing the Job Server](#)
- *Installation Guide*, Chapter 10, Installing Job Server

□ **Task 10 (Required)**

Run the Upgrade in Place program to upgrade the current SmartStream database server to the new release.

- Run `\dbms\upgrade\setup.exe`

For More Information:

- [Running the Upgrade in Place Program](#)
- *Upgrade in Place* guide

□ **Task 11 (Complete only if you have licensed and installed language kits)**

Reload your SmartStream language kits

For More Information:

- [Reloading SmartStream Language Kits](#)
- *Upgrade in Place*, Chapter 5, Post-Upgrade Tasks

□ **Task 12 (Complete only if you are adding newly licensed products)**

Load databases for newly licensed products (no education data)

- Run `\CREATELD\setup.exe`

For More Information:

- [Loading Databases for Newly Licensed Products](#)
- *Installation Guide*, Chapter 6, Installing SmartStream Products on the Database Server

□ **Task 13 (Complete only if you tailor your accounting key)**

Run `udak.exe` on architecture tables in Special mode

- Run `\dbms\udak\udak.exe` (first run in Special Mode, Architecture Tables for All Products)
- Run `\dbms\udak\udak.exe` (second run in Special Mode, Architecture Tables for Consolidations)

For More Information:

- [Processing the Architecture Tables in Special Mode](#)
- *Upgrade in Place*, Chapter 3, Tailoring Your Accounting Key

□ **Task 14 (Optional)**

Reinstall SmartStream Connect

For More Information:

- [Installing SmartStream Connect](#)
- *Installation Guide*, Chapter 11, Installing SmartStream Connect

□ **Task 15 (Required)**

Reinstall Mail Gateway

- Run **setup.exe** from the **\mailgate** directory on the SmartStream file server.

For More Information:

- [Installing the Mail Gateway](#)
- *Installation Guide*, Chapter 9, Installing SmartStream Mail Gateway

□ **Task 16 (Required)**

Reinstall your SmartStream client workstations (from file server image)

- Uninstall previous version of SmartStream client
- Prepare the SmartStream client workstation
- Install SmartStream client **\\sslsetup.exe /a**
- Reboot the workstation

For More Information:

- [Installing SmartStream Clients](#)
- *Installation Guide*, Chapter 7, Preparing the SmartStream Client Workstations
- *Installation Guide*, Chapter 8, Installing SmartStream Products on the Client Workstations

□ **Task 17 (Required)**

Configure Master Scheduler, Poll, and ARPC

- Using SmartStream, configure Master Scheduler, Poll, and ARPC
- **For SmartStream Human Capital Management (HCM) only**, create a shortcut on Windows workstations on the desktop for Poll.
- In a Windows environment, using the Services utility from the Administrative Tools utility in Control Panel, change the startup type for SmartStream Master Scheduler, Poll, and ARPC to **Automatic**, and then start them.

For More Information:

- [Configuring Master Scheduler, Poll and ARPC](#)
- *Installation Guide*, Chapter 10, Installing Job Server

Setting Up the File Server

Run the SmartStream File Server Setup program for each of the following items, if licensed, in the order listed to install them on the file server:

- SmartStream products
- SmartStream Builder
- Language kits

Installation Medium

SmartStream can be installed from an installation image downloaded from the Infor Product Download Center which is accessed from Infor Concierge Portal. Select Products and Subscriptions from the Left Menu selection. You will be shown the Products and Subscriptions window. Select the Visit Infor Product Download Center link.

Procedure

| Step | Action |
|------|---|
| 1 | Insert the compact disc in the CD drive and the license diskette in a disk drive. |
| 2 | Run setup.exe from the following directory on the CD <ul style="list-style-type: none">▪ For SmartStream and language kits, <i>CD-ROM drive:\dbs\instmgr\install</i>▪ For SmartStream Builder, <i>CD-ROM drive:\strmbldr\instmgr\install</i> where <i>CD-ROM drive:\</i> is the location where either <ul style="list-style-type: none">▪ The SmartStream CD is inserted▪ The SmartStream installation image was downloaded. <p>Result: The File Server Setup window appears.</p> |

| Step | Action |
|------|--------|
| 3 | |

Specify the location of the license file (*.lic) and source directory and click Next:

Note: You must have an 8.0 license file to install SmartStream 8.0. License files from earlier SmartStream releases will not work.

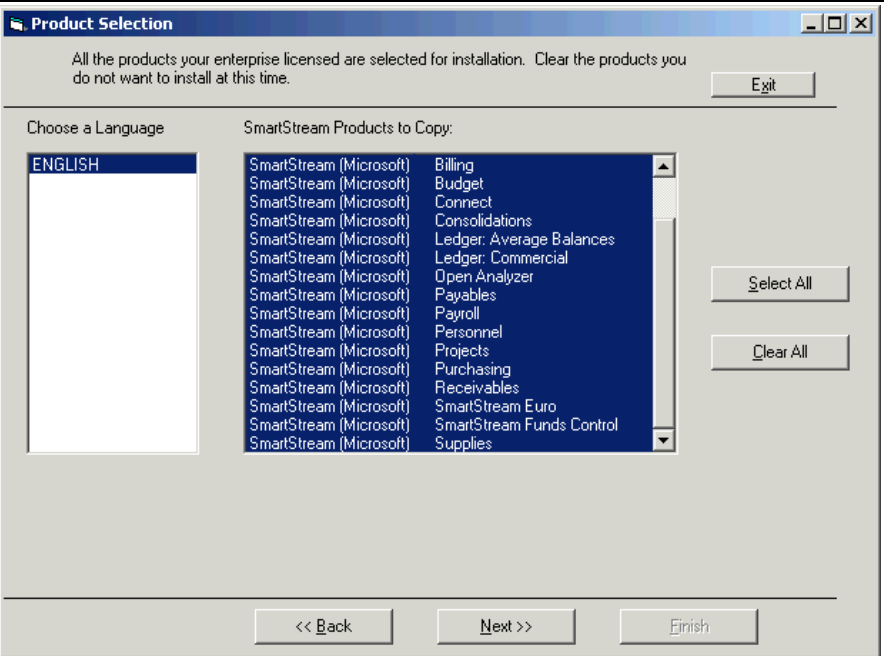
Result: The Destination Directory window appears.

| | |
|---|--|
| 4 | |
|---|--|

Select the operating system your job server will be running on from the Operating System field and specify the destination directory. The destination directory is created if you have not added it yet.

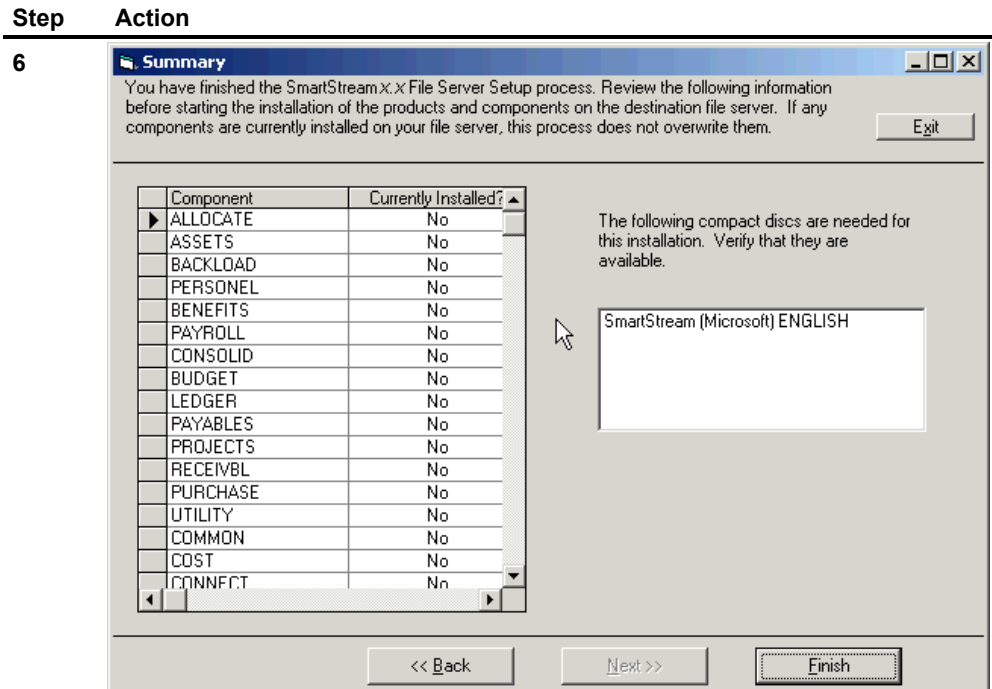
Note: Windows batch programs are always installed in addition to whatever else is selected.

Result: The Product Selection window appears.

| Step | Action |
|------|--|
| 5 |  |

Review the products selected for installation and clear the products you do not want to install.

Result: The Summary window appears.

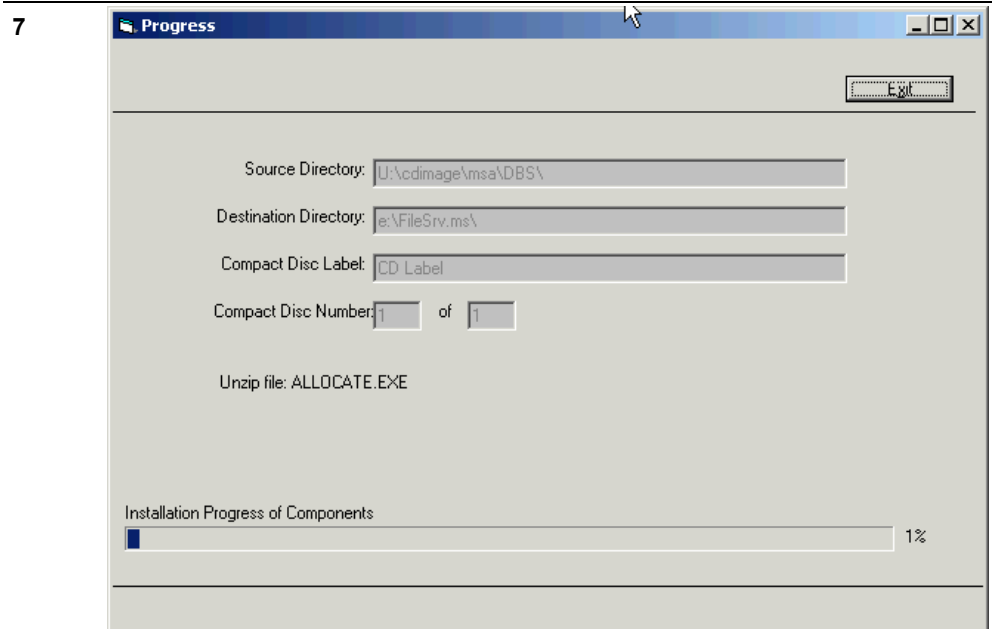


Review the list of components to be installed.

To make changes, click **Back**.

To begin installing products and components on the file server, click **Finish**.

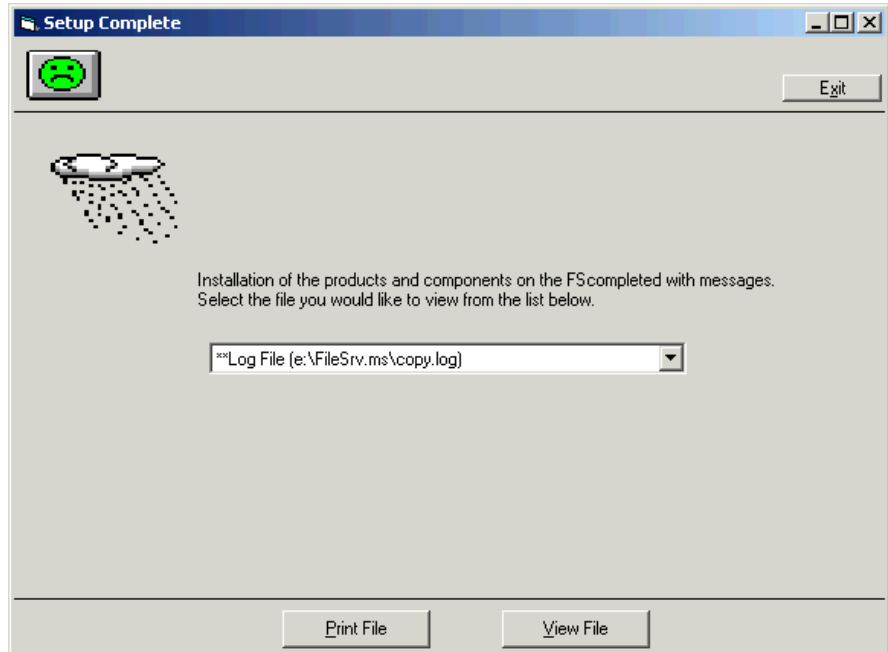
Result: The Progress window appears.



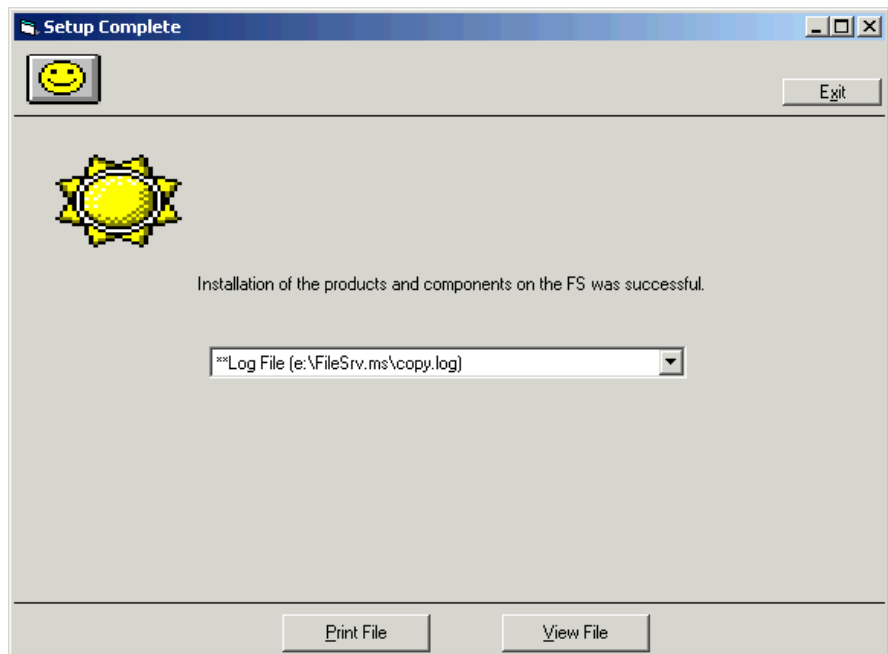
SmartStream products and components are being installed on the destination server. You must wait for this process to complete.

Result: The Setup Complete window appears.

| Step | Action |
|------|---|
| 8 | If a rain cloud appears, review the dbsinst.err file. |



If a yellow sun appears, you can exit the setup program by clicking Yes on the File Server Setup Complete prompt.

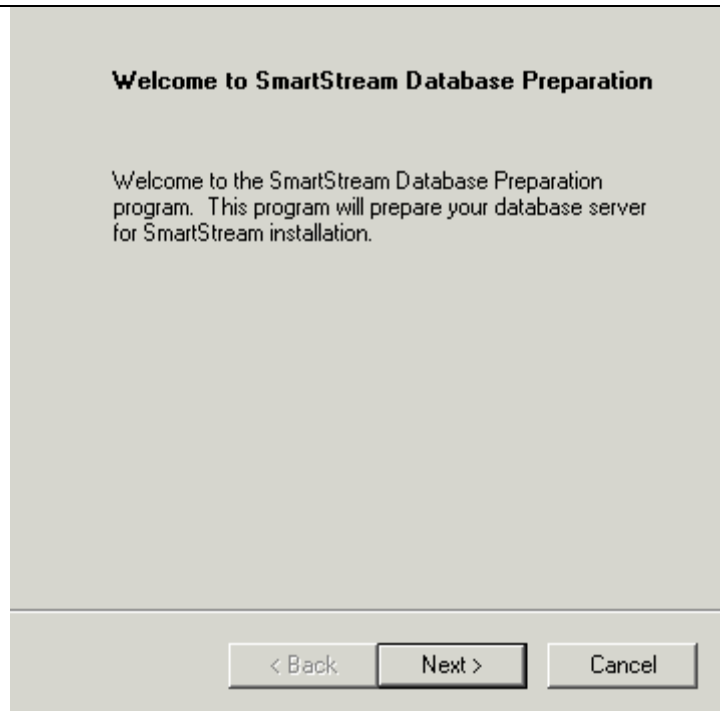


Preparing the Sybase Database Server

Run the Database Preparation program (dbsprep.exe) to adjust parameters for your Sybase database server if they are less than the minimum settings required to install SmartStream and SmartStream products.

| Step | Action |
|------|---|
| 1 | Run the setup.exe program in the following directory: <i>drive:\directory\utility\dbsprep\</i> where <i>drive:\directory</i> is the location where SmartStream is installed on the file server. Result: The Welcome to SmartStream Database Preparation window appears. |

2



Click Next.

Result: The Database Server Information window appears.

| Step | Action |
|------|---|
| 3 | <p>Enter logon information for the database server that you plan to use for your SmartStream installation.</p> <p>Database Server Name: <input type="text" value="DEVSQL35S1"/></p> <p>System Administrator ID: <input type="text" value="sa"/></p> <p>Password: <input type="password" value="XXXXXXXX"/></p> <p style="text-align: right;"> <input style="margin-right: 10px;" type="button" value=" < Back "/> <input style="margin-right: 10px;" type="button" value=" Next > "/> <input style="margin-right: 10px;" type="button" value=" Cancel "/> </p> |

Enter your logon information for the database server you are going to use for your SmartStream environment.

Result: The Sybase Server Environment window appears

| | |
|---|---|
| 4 | <p>The configuration parameters are determined by the operating system of your Sybase database server. Select the operating system used for DEVSQL35S1:</p> <p> <input checked="" type="radio"/> Microsoft Windows Server <input type="radio"/> Unix Operating System </p> <p style="text-align: right;"> <input style="margin-right: 10px;" type="button" value=" < Back "/> <input style="margin-right: 10px;" type="button" value=" Next > "/> <input style="margin-right: 10px;" type="button" value=" Cancel "/> </p> |
|---|---|

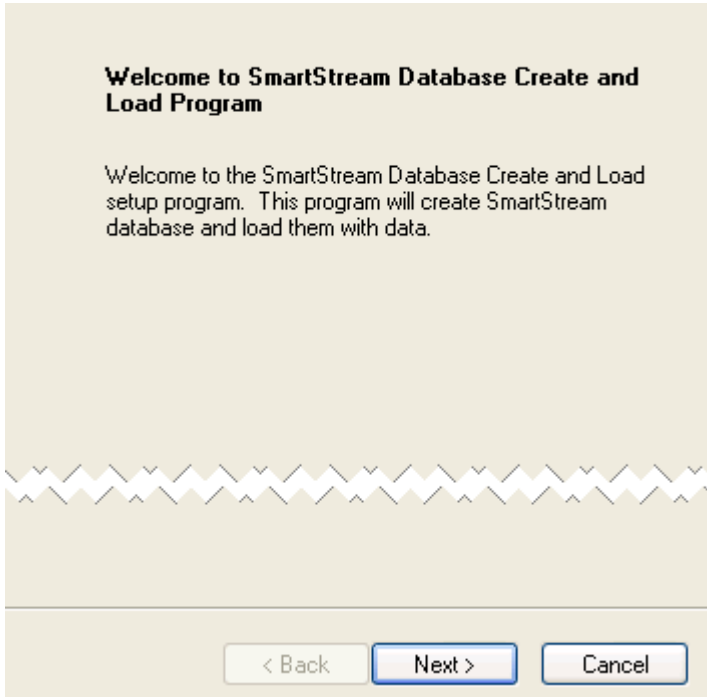
Specify whether the database server is running on a Windows or UNIX platform.

- | | |
|---|---|
| 5 | Shut down and restart the database server when prompted to do so. |
| 6 | Click OK. |
| 7 | Click Finish when processing completes successfully. |
| 8 | Click Exit. |

Creating and Loading Databases for SmartStream Products

Run the Database Server Setup program on the installation workstation from the directory where you installed SmartStream.

Creating Databases

| Step | Action |
|------|--|
| 1 | Run setup.exe from the \createld directory at the root of the file server image. Result: The Welcome to SmartStream Database Create and Load Program window appears. |
| 2 |  <p>Click Next.</p> Result: The SmartStream Environment window appears. |

| Step | Action |
|------|---|
| 3 | <p>Select the directory where SmartStream® is installed on the file server and the name of the environment where databases will be created/loaded.</p> <p>SmartStream File Server Path <input type="text" value="E:\FileSrv.ms\"/> <input type="button" value="Browse..."/></p> <p>SmartStream Environment <input type="text" value="ATLPACK12"/></p> <p style="text-align: right;"> <input type="button" value=" < Back"/> <input type="button" value=" Next > "/> <input type="button" value=" Cancel"/> </p> |

Specify the environment where you want products installed and click Next:

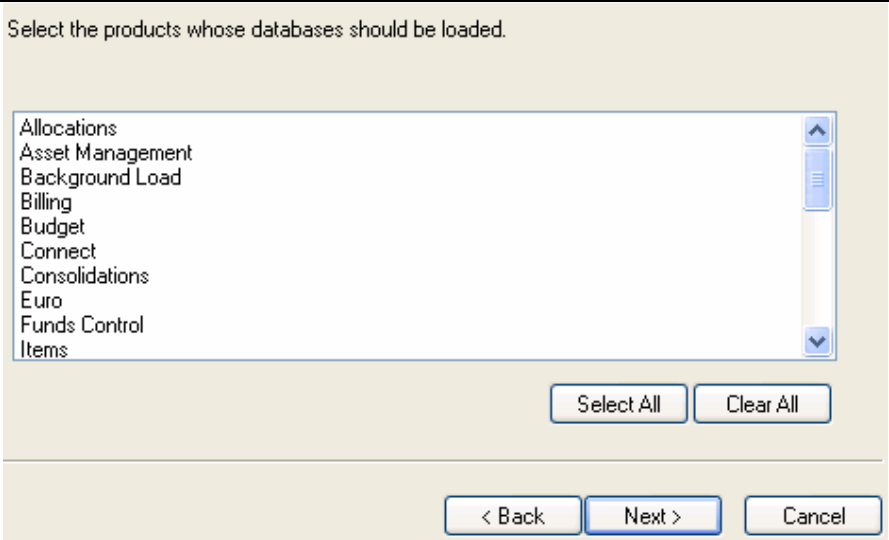
- **For a new environment**, enter the description of the environment.
- **For a previously added environment**, select the environment where you want the databases created.

Result: The Database Server window appears.

| | |
|---|--|
| 4 | <p>Enter information about the server where SmartStream databases should be created.</p> <p>Database Server Name: <input type="text" value="ATLPACK12"/></p> <p>System Administrator ID: <input type="text" value="sa"/></p> <p>Password: <input type="password" value="xxxxxx"/></p> <p style="text-align: right;"> <input type="button" value=" < Back"/> <input type="button" value=" Next > "/> <input type="button" value=" Cancel"/> </p> |
|---|--|

Enter information about where you want the databases created and click Next.

Result: The Product Selection window appears.

| Step | Action |
|------|---|
| 5 | <p>Select the products whose databases should be loaded.</p>  |

Select the products to create databases for and click Next.

Result: The Database Location window appears.

| | |
|---|--|
| 6 | <p>Enter the directories where most (or all) database and log files should be created. You will be able to change these default locations for individual databases in the next step. The paths given should be valid if accessed from the database server.</p> <p>Directory where databases should be created: <input type="text" value="e:\mssql\mssql\data"/></p> <p>Directory where database logs should be created: <input type="text" value="e:\mssql\mssql\data"/></p> <p style="text-align: right;"> <input type="button" value=" < Back"/> <input type="button" value=" Next > "/> <input type="button" value=" Cancel"/> </p> |
|---|--|

Define the database location settings.

- **For Sybase**, enter the data device name for the Sybase database server.
Note: You can use the SP_helpdevice command from your Adaptive Server Enterprise SQL client to find the names for these devices.
- **For Microsoft SQL Server**, enter the path to the directory where you want data and log files created.
Note: The path you enter for Microsoft SQL Server must be for the server that is running Microsoft SQL Server.

Click Next.

Result: The Database Details window appears.

| Step | Action |
|------|--|
| 7 | <p>Modify the database and log parameters for any family that you wish to change.</p> <p>Product Name: <input type="text" value="SmartStream"/> Database Family: <input type="text" value="ctlgddl"/></p> <p>Directory where databases should be created: <input type="text" value="e:\mssql\mssql\data"/> Database Size: <input type="text" value="0"/></p> <p>Directory where database logs should be created: <input type="text" value="e:\mssql\mssql\data"/> Log Size: <input type="text" value="0"/></p> <p style="text-align: right;"> <input style="margin-right: 10px;" type="button" value=" < Back "/> <input style="margin-right: 10px;" type="button" value=" Next > "/> <input style="margin-right: 10px;" type="button" value=" Cancel "/> </p> |

Click Next to accept the defaults, or change the default database and log sizes as needed and click Next.

Result: The Database Create Summary window appears.

| | |
|----|---|
| 10 | <p>You made the following selections to create SmartStream databases. Choose Back if you want to change any settings. Choose Next to begin creating.</p> <p>Current Settings:</p> <div style="border: 1px solid gray; padding: 5px;"> <p>Creating SmartStream Databases</p> <p>Database Server: ATLPACK12 DBMS Type: MSS SA Role ID: sa</p> <p>Databases for the following products will be processed: The following products will be processed: SmartStream Shared Components</p> </div> <p>InstallShield</p> <p style="text-align: right;"> <input style="margin-right: 10px;" type="button" value=" < Back "/> <input style="margin-right: 10px;" type="button" value=" Next > "/> <input style="margin-right: 10px;" type="button" value=" Cancel "/> </p> |
|----|---|

Review the selections you made.

- To make changes, click Back.
- To finish the setup process, click Next.

Result: The setup program begins creating databases.

If errors occur during processing, the Database Error Review window appears where you can

- Correct errors using the list of files and the Edit button. Then click Retry.
- Click Cancel to end the process without making the requested changes.

If no errors occur, the Database Operation window appears.

| Step | Action |
|------|--|
| 11 | <p>Databases have been successfully created on ATLPACK12.</p> <p>Run the Create/Load program again to load the databases with required data.</p> <p style="text-align: right;"><input type="button" value="Exit"/></p> |

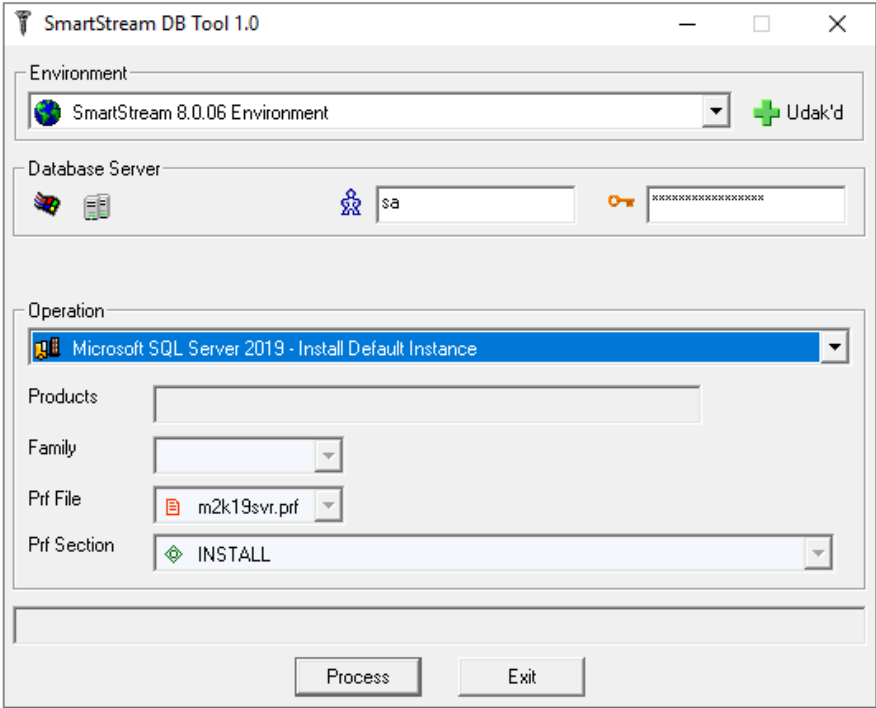
Click Exit and go to the Loading Databases procedures.

Loading Databases

Prerequisite for Microsoft SQL Server

For Microsoft SQL Server, before you can load data into the databases you created earlier, you must run the DBtool configurations utility using this procedure:

| Step | Action |
|------|---|
| 1 | <p>Run dbtool.exe from the DBMS directory at the root of the file server image.</p> <p>Result: The SmartStream DB Tool 1.0 window appears.</p> |

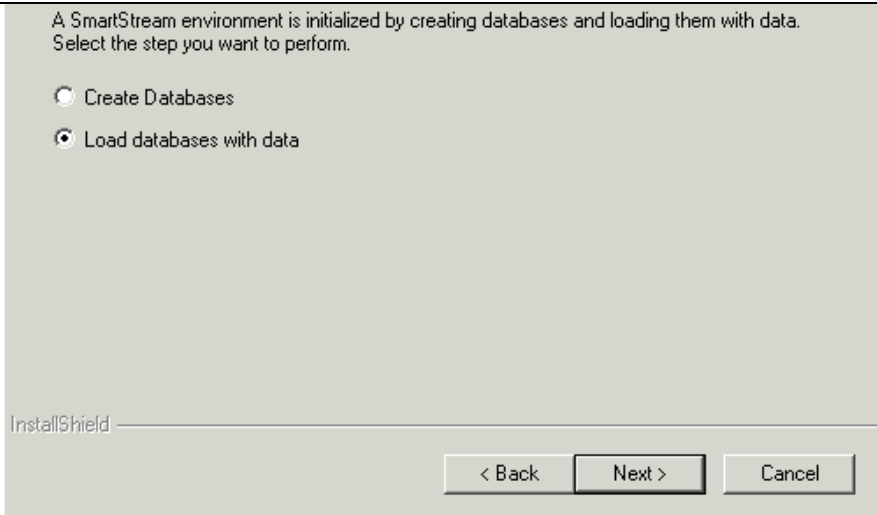
| Step | Action |
|------|---|
| 2 |  |
| | <p>In the Environment area, choose your SmartStream environment from the drop-down list.</p> |
| 3 | <p>In the Database Server area, enter the sa ID and password.</p> |
| 4 | <p>In the Operation area, depending on your database installation, choose Microsoft SQL Server version - Install Default Instance or Microsoft SQL Server version - Install Named Instance from the drop-down list, where <i>version</i> is your version of Microsoft SQL Server.</p> |
| 5 | <p>Click Process.</p> <p>Result: The settings needed for SmartStream are set up on the Microsoft SQL Server database server.</p> |
| 6 | <p>Click OK on the DB Tool Success Report window.</p> |
| 7 | <p>Click Exit.</p> |

Named Instance Considerations

If you are installing a named instance, restart the SQL Server service before loading the databases so that the server name references are updated correctly (the results of the sp_dropserver and sp_addserver commands are reflected in the contents of the @@servername variable).

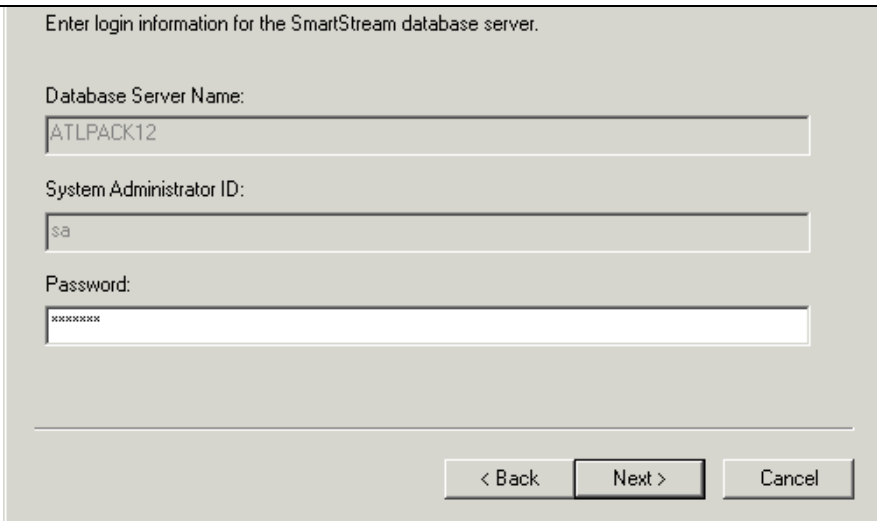
Loading Databases Procedure

To load data into the databases, complete this procedure:

| Step | Action |
|------|---|
| 1 | Run setup.exe from the createld directory at the root of the file server image. Result: The Database Create/Load Step window appears. |
| 2 |  |

Select Load databases with data and click Next.

Result: The Database Server window appears.

| | |
|---|--|
| 3 |  |
|---|--|

Enter the password for the database server and click Next.

Result: The Product Selection window appears.

| Step | Action |
|------|---|
| 4 | <p>Select the products whose databases should be loaded.</p> <div style="border: 1px solid gray; padding: 5px;"> <p>Allocations Asset Management Background Load Billing Budget Connect Consolidations Euro Funds Control Items</p> </div> <p style="text-align: right;"> <input type="button" value="Select All"/> <input type="button" value="Clear All"/> </p> <p style="text-align: right;"> <input type="button" value=" < Back"/> <input type="button" value=" Next >"/> <input type="button" value=" Cancel"/> </p> |

Select the products whose data you want to load and click Next.

Result: The Education Data window appears.

| | |
|---|--|
| 5 | <p>If you haven't modified your user-defined accounting key (UDAK), you can load both required and sample data. Would you like to load the sample data?</p> <p> <input checked="" type="radio"/> Yes, load both required and sample data <input type="radio"/> No, just load required data </p> <p style="text-align: right;"> InstallShield <input type="button" value=" < Back"/> <input type="button" value=" Next >"/> <input type="button" value=" Cancel"/> </p> |
|---|--|

Determine whether you want to load both required and sample data or required data only and click Next.

Notes:

- You can load sample data only if you did **not** tailor your accounting key.
- If you choose to load sample data on the Education Data window, before you can tailor your accounting key and load production data, you must run the table initialization program to remove the sample data.

Result: The Database Load Summary window appears.

| Step | Action |
|------|--|
| 6 | <p>You made the following selections to load SmartStream databases. Choose Back if you want to change any settings. Choose Next to begin loading data.</p> <p>Current Settings:</p> <div data-bbox="610 369 1390 642" style="border: 1px solid gray; padding: 5px;"> <p>Loading SmartStream Databases Loading with Education Data</p> <p>Database Server: ATLPACK12 DBMS Type: MSS SA Role ID: sa</p> <p>Databases for the following products will be processed: The following products will be processed: SmartStream</p> </div> <p>InstallShield</p> <div data-bbox="1003 701 1409 741" style="text-align: right;"> <input style="margin-right: 10px;" type="button" value=" < Back "/> <input style="margin-right: 10px;" type="button" value=" Next > "/> <input style="margin-right: 10px;" type="button" value=" Cancel "/> </div> |

Review the selections you made.

- If you need to make changes, click Back.
- If you want to continue, click Next.

Result: The setup program begins loading the databases with data.

If errors occur during processing, the Database Error Review window appears where you can

- Correct errors using the list of files and the Edit button. Then click Retry.
- Click Cancel to end the process without making the requested changes.

If no errors occur, the Database Operation window appears.

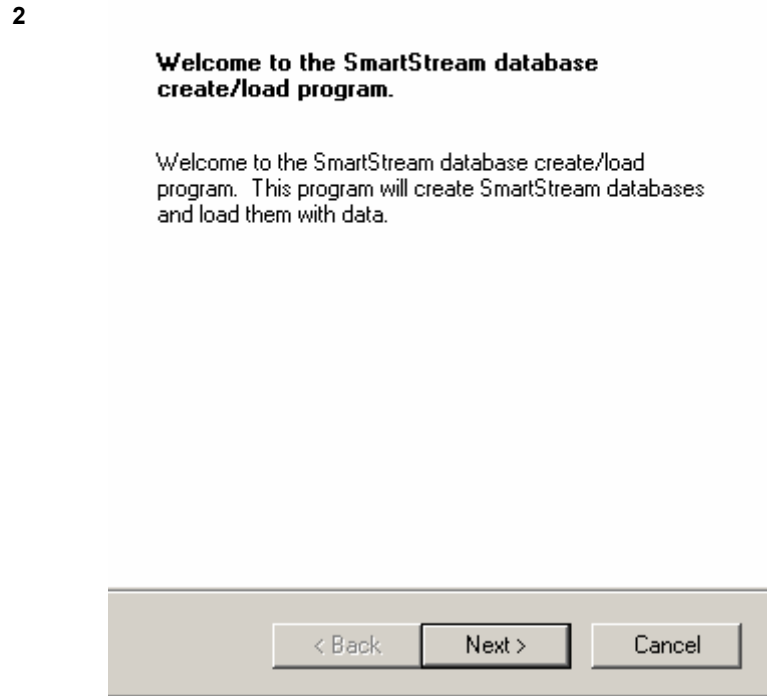
| | |
|---|---|
| 7 | <p>Databases on ATLPACK12 have been successfully loaded with data.</p> <div data-bbox="1279 1612 1409 1654" style="text-align: right; margin-top: 100px;"> <input style="margin-right: 10px;" type="button" value=" Exit "/> </div> |
|---|---|

Click Exit when processing completes successfully.

Loading SmartStream Language Kits

If you have licensed language kits, complete this procedure for each one:

| Step | Action |
|------|---|
| 1 | Run setup.exe from the createld directory at the root of the language kit file server image. Result: The Welcome to the SmartStream database create/load program window appears. |



Click Next.

Result: The SmartStream Environment window appears.

| Step | Action |
|------|--|
| 3 | <p>Select the directory where your base (English) SmartStream files are located on the file server and the name of the environment where databases will be loaded.</p> <p>SmartStream File Server Path <input type="text" value="K:\STE\w2k.syb"/> <input type="button" value="Browse..."/></p> <p>SmartStream Environment <input type="text" value="atldev02s1"/></p> <p style="text-align: right;"><input type="button" value=" < Back"/> <input type="button" value=" Next > "/> <input type="button" value=" Cancel"/></p> |

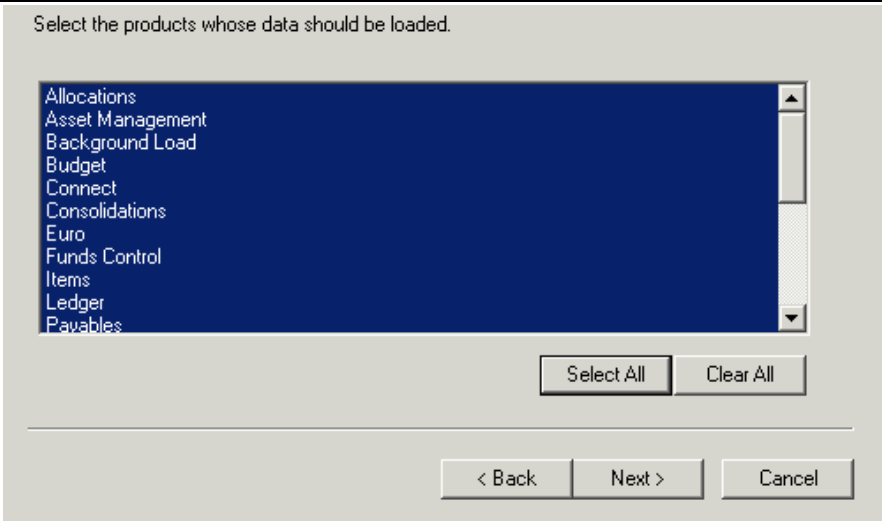
Enter the directory where SmartStream is installed on the file server, select an environment or type the name of a new environment that you want to create.

Result: The Database Server window appears.

| | |
|---|--|
| 4 | <p>Enter login information for the SmartStream database server.</p> <p>Database Server Name: <input type="text" value="atldev02s1"/></p> <p>System Administrator ID: <input type="text" value="sa"/></p> <p>Password: <input type="password" value="xxxxxxxx"/></p> <p style="text-align: right;"><input type="button" value=" < Back"/> <input type="button" value=" Next > "/> <input type="button" value=" Cancel"/></p> |
|---|--|

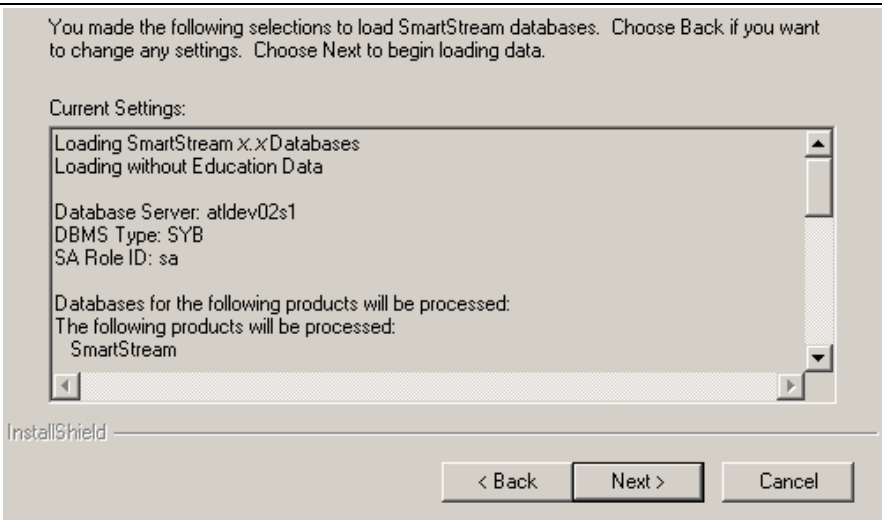
Enter information about the server where you want to load the language kit data and click Next.

Result: The Product Selection window appears.

| Step | Action |
|------|--|
| 5 | <p>Select the products whose data should be loaded.</p>  |

Use the buttons to choose the products that you want to install and click Next.

Result: The Database Load Summary window appears.

| | |
|---|---|
| 6 | <p>You made the following selections to load SmartStream databases. Choose Back if you want to change any settings. Choose Next to begin loading data.</p> <p>Current Settings:</p>  |
|---|---|

Review the selections you made.

- If you need to make changes, click Back.
- If you want to continue, click Next then Finish.

Result: The setup program begins loading data. If errors occur during processing, the Database Error Review window appears where you can

- Correct errors using the list of files and the Edit button. Then click Retry.
- Click Cancel to end the process without making the requested changes.

If no errors occur, the Database Operations window appears

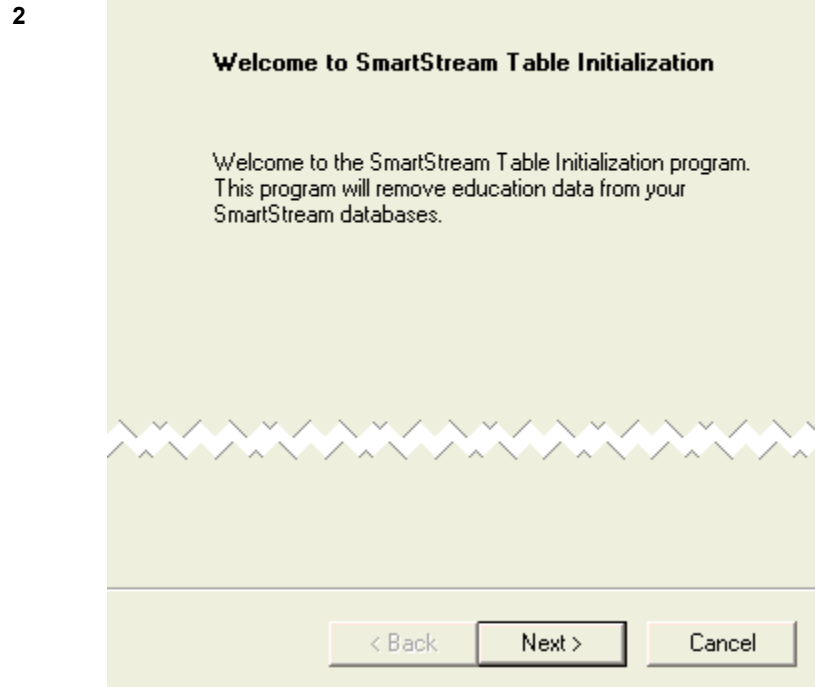
| Step | Action |
|------|---|
| 7 | Databases on atldev02s1 have been successfully loaded with data.  A screenshot of a dialog box with a light gray background. The text "Databases on atldev02s1 have been successfully loaded with data." is displayed at the top. At the bottom right, there is a button labeled "Exit". |

Click Exit.

Initializing Tables

Run the Table Initialization program to remove education and sample data from your SmartStream database tables if you loaded this data. It also loads minimum required data into the tables.

| Step | Action |
|------|--|
| 1 | Run setup.exe from the \dbms directory on the SmartStream file server. Result: The Welcome to SmartStream Table Initialization window appears. |



Click Next.

| | |
|---|---|
| 3 | If you have multiple environments, the SmartStream Environment on File Server window appears. Specify the SmartStream environment you want to process tables in and click Next. Result: The Database Server Information window appears. |
|---|---|

| Step | Action |
|------|---|
| 4 | <p>Enter logon information for the database server where table initialization should occur.</p> <p>Database Server Name: <input type="text" value="atls04s2"/></p> <p>System Administrator ID: <input type="text" value="sa"/></p> <p>Password: <input type="password" value="xxxxx"/></p> <p style="text-align: right;"> <input type="button" value=" < Back"/> <input type="button" value=" Next > "/> <input type="button" value=" Cancel"/> </p> |

Enter the database server logon information and click Next.

Result: The Product Selection window appears

| | |
|---|---|
| 5 | <p>The following products are currently installed on atls04s2.</p> <p>Choose the products that you want the table initialization program to process.</p> <div style="border: 1px solid black; padding: 5px;"> <ul style="list-style-type: none"> Payroll Personnel Procurement Common Projects Purchasing Receivables Receiving Shared Components SmartStream StreamBuilder </div> <p style="text-align: right;"> <input type="button" value=" Select All "/> <input type="button" value=" Clear All "/> </p> <p style="text-align: right;"> <input type="button" value=" < Back"/> <input type="button" value=" Next > "/> <input type="button" value=" Cancel"/> </p> |
|---|---|

Select the products whose tables you want processed and click Next.

Note: The products listed are loaded on the database server.

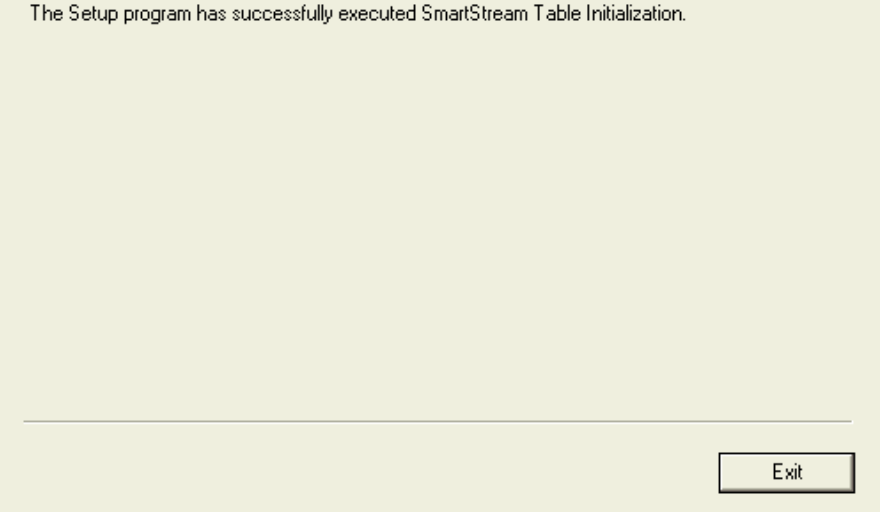
Result: The SmartStream Table Initialization Summary window appears.

| Step | Action |
|------|---|
| 6 | <p>You made the following table initialization selections. Choose Back if you want to change any settings. Choose Next to begin table initialization.</p> <p>Current Settings:</p> <div style="border: 1px solid black; padding: 5px;"> <p>Database Server: atlrs04s2</p> <p>DBMS Type: SYB</p> <p>SA Role ID: sa</p> <p>The following products will be processed:</p> <ul style="list-style-type: none"> SmartStream Shared Components Ledger Asset Management Consolidations Allocations Budget </div> <p style="text-align: right;"> <input style="margin-right: 10px;" type="button" value=" < Back "/> <input style="margin-right: 10px;" type="button" value=" Next > "/> <input style="margin-right: 10px;" type="button" value=" Cancel "/> </p> |

Review your selections and click Next to continue.

| | |
|---|--|
| 7 | <p>InstallShield Wizard Complete</p> <p>The InstallShield Wizard has successfully installed SmartStream Table Initialization. Click Finish to exit the wizard.</p> <p style="text-align: right;"> <input style="margin-right: 10px;" type="button" value=" < Back "/> <input style="margin-right: 10px;" type="button" value=" Finish "/> <input style="margin-right: 10px;" type="button" value=" Cancel "/> </p> |
|---|--|

Click Finish to begin table initialization.

| Step | Action |
|------|---|
| 8 | <p>The Setup program has successfully executed SmartStream Table Initialization.</p>  |

Click Exit when processing completes successfully.

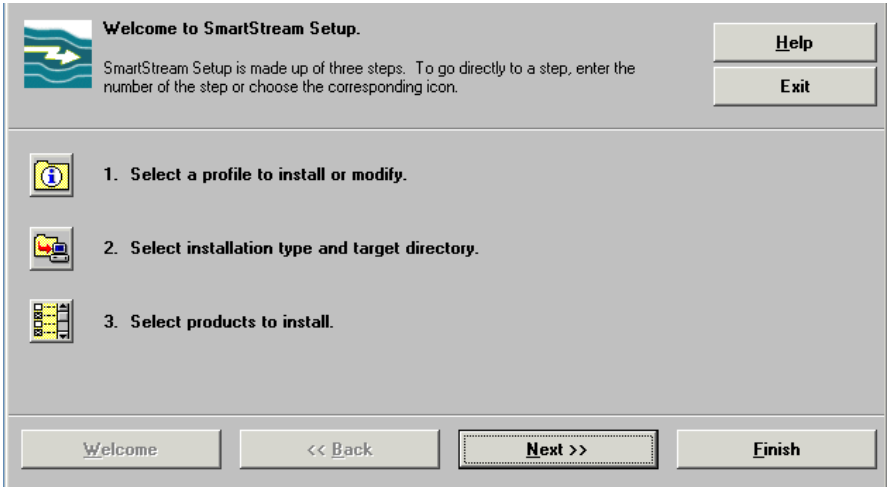
Installing SmartStream Clients

SmartStream provides several options for installing and reinstalling SmartStream clients. For information about the available options, see Considerations for Upgrading SmartStream Client Workstations in Chapter 8, Installing SmartStream Products on the Client Workstations.

To install SmartStream products on your client workstation according to your personal specifications or to create a profile to use for multiple client workstations, you can use the custom installation method described in this procedure:

| Step | Action |
|------|--|
| 1 | Uninstall any previous version of SmartStream Client. |
| 2 | Prepare the SmartStream client workstation by configuring it properly and installing any third-party software you require. |
| 3 | Run setup.exe /a from the \ss directory on the file server. Result: The Welcome to SmartStream Setup window appears. |

4



Help

Exit

1. Select a profile to install or modify.

2. Select installation type and target directory.

3. Select products to install.

Welcome << Back Next >> Finish

Click the icon for 2 and click Next.

Result: The 2. Select target directory window appears.

| Step | Action |
|------|--|
| 5 | <div data-bbox="563 247 1438 728"> <p>2. Select target directory.</p> <p>Target Directory</p> <p>c:\sstrmxx</p> <p>Change Directory...</p> <p>Welcome << Back Next >> Finish</p> <p>Help Exit</p> </div> |

Enter the path for the target directory and click Next.


Note: The **c:\program files** directory and subdirectories are considered system file areas, and they have special properties. We do not support installing SmartStream programs in the **c:\program files** directory because doing so causes issues with SmartStream. The default installation directory name is **sstrmxx**, where **xx** is the SmartStream release number. The **sstrmxx** directory is the supported installation directory.

Result: The 3. Select products to install window appears.

| 6 | <div data-bbox="563 1031 1438 1512"> <p>3. Select products to install.</p> <p>Select products you want to install. Clear those you do not want to install.</p> <table border="1"> <thead> <tr> <th>SmartStream Products</th> <th>MB Used</th> </tr> </thead> <tbody> <tr><td><input checked="" type="checkbox"/> Allocations</td><td>5.8</td></tr> <tr><td><input checked="" type="checkbox"/> Asset Management</td><td>20.8</td></tr> <tr><td><input checked="" type="checkbox"/> Benefits</td><td>5.7</td></tr> <tr><td><input checked="" type="checkbox"/> Billing</td><td>10.0</td></tr> <tr><td><input checked="" type="checkbox"/> Budget Administrator & Workbench</td><td>13.2</td></tr> <tr><td><input type="checkbox"/> Budget Workbench Only</td><td>0.0</td></tr> <tr><td><input checked="" type="checkbox"/> Common Components</td><td>32.3</td></tr> <tr><td><input checked="" type="checkbox"/> Consolidations</td><td>5.0</td></tr> </tbody> </table> <p>Reset Dependencies</p> <p>Clear All</p> <p>Disk Space</p> <p>Available: 10,512.4 MB</p> <p>Required: 318.2 MB</p> <p>Welcome << Back Next >> Finish</p> <p>Help Exit</p> </div> | SmartStream Products | MB Used | <input checked="" type="checkbox"/> Allocations | 5.8 | <input checked="" type="checkbox"/> Asset Management | 20.8 | <input checked="" type="checkbox"/> Benefits | 5.7 | <input checked="" type="checkbox"/> Billing | 10.0 | <input checked="" type="checkbox"/> Budget Administrator & Workbench | 13.2 | <input type="checkbox"/> Budget Workbench Only | 0.0 | <input checked="" type="checkbox"/> Common Components | 32.3 | <input checked="" type="checkbox"/> Consolidations | 5.0 |
|--|--|----------------------|---------|---|-----|--|------|--|-----|---|------|--|------|--|-----|---|------|--|-----|
| SmartStream Products | MB Used | | | | | | | | | | | | | | | | | | |
| <input checked="" type="checkbox"/> Allocations | 5.8 | | | | | | | | | | | | | | | | | | |
| <input checked="" type="checkbox"/> Asset Management | 20.8 | | | | | | | | | | | | | | | | | | |
| <input checked="" type="checkbox"/> Benefits | 5.7 | | | | | | | | | | | | | | | | | | |
| <input checked="" type="checkbox"/> Billing | 10.0 | | | | | | | | | | | | | | | | | | |
| <input checked="" type="checkbox"/> Budget Administrator & Workbench | 13.2 | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> Budget Workbench Only | 0.0 | | | | | | | | | | | | | | | | | | |
| <input checked="" type="checkbox"/> Common Components | 32.3 | | | | | | | | | | | | | | | | | | |
| <input checked="" type="checkbox"/> Consolidations | 5.0 | | | | | | | | | | | | | | | | | | |

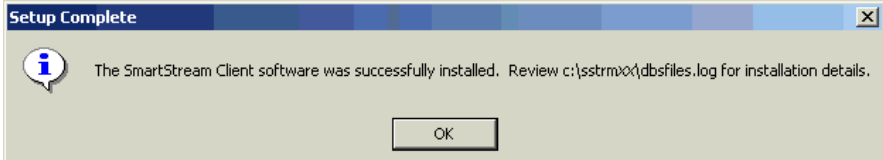
Select products to install and click Next.

Result: The You have finished the SmartStream Setup specification window appears.

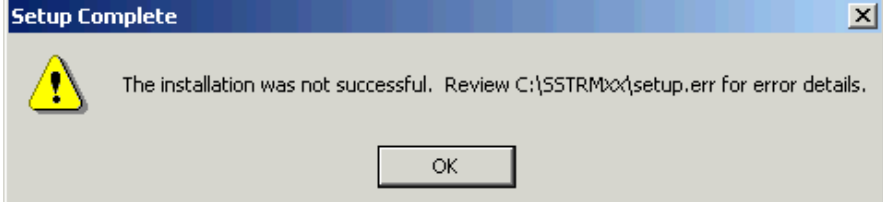
| Step | Action |
|------|--|
| 7 |  <p>You have finished the SmartStream Setup specification. Use the Save Profile button to save this setup specification as a new or existing profile. Use the Begin Installation button to start installing SmartStream.</p> <p>Profile Name: Untitled Target Directory: c:\sstrmXX Products: Allocations, Asset Management, Benefits, Billing, Budget Administrator & Workbench, Common Components, Consolidations, Euro Currency, Funds Control, Ledger, Open Analyzer, Payables, Payroll, Personnel, Platform Tools, Projects, Projects Allocations, Projects Common.</p> <p>Buttons: Save Profile..., Begin Installation</p> <p>Navigation: Welcome, << Back, Next >>, Finish</p> |

If you are creating a profile, click Save Profile and provide the necessary information.

Click Begin Installation to install SmartStream.

| | |
|---|--|
| 8 |  <p>The SmartStream Client software was successfully installed. Review c:\sstrmXX\dbfiles.log for installation details.</p> <p>OK</p> |
|---|--|

Review the dbfiles.log file if this message appears.

| | |
|---|---|
| 8 |  <p>The installation was not successful. Review C:\SSTRMXX\setup.err for error details.</p> <p>OK</p> |
|---|---|

Review the **setup.err** file if this error message appears.

| | |
|---|--|
| 9 | After successful installation, reboot the workstation. |
|---|--|

Configuring Your User-Defined Accounting Key (UDAK)

To configure your user-defined accounting key, you must complete the following tasks:

- Tailoring the delivered accounting key in tables, views, stored procedures, and triggers with your user-defined accounting key
- Compiling your user-defined accounting key by loading the tables, views, stored procedures, and triggers tailored with your user-defined accounting key into the SmartStream databases
- Tailoring the accounting key in your architecture tables
- Regenerating the dynamic runtime libraries

The first two tasks are described in this topic; the other two are included later in this chapter.

Run the User-Defined Accounting Key (UDAK) program to tailor tables, views, stored procedures, triggers, and windows with the accounting fields and reporting periods you define.

If the accounting key in the SmartStream environment you are migrating has been tailored, you need to tailor the one in the new SmartStream environment as well. To migrate SmartStream data successfully, the column names in the two environments must match.

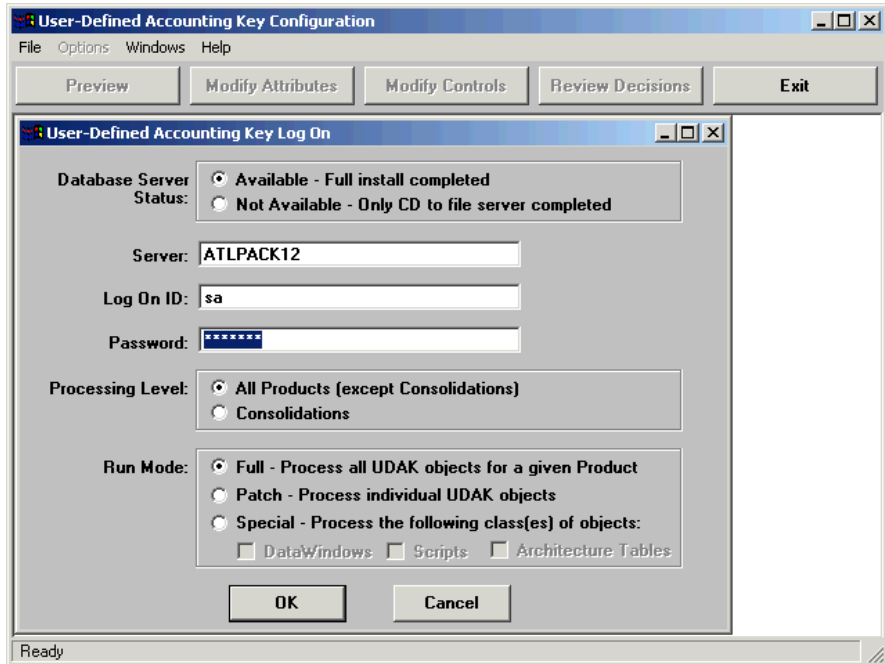
Tailoring the Delivered Accounting Key

To run the UDAK program that tailors the delivered accounting key, complete this procedure.

Note: If you are performing migration or upgrade-in-place processing, start with Step 1; otherwise, start with Step 2.

| Step | Action |
|------|--|
| 1 | On your SmartStream file server, copy the <code>udak.ini</code> file from the <code>\dbms\udak</code> directory for your current version of SmartStream to the <code>\dbms\udak</code> directory for the new version of SmartStream. |
| 2 | Run <code>udak.exe</code> from the <code>\dbms\udak</code> directory for the new version of SmartStream on your SmartStream file server. Result: The User-Defined Accounting Key Log On window appears. |

| Step | Action |
|------|--|
| 3 | <p>Database Server Status field Installation and Migration: Set to Available - Full install completed. Upgrade in Place: Set to Not Available - Only CD to file server completed.</p> |



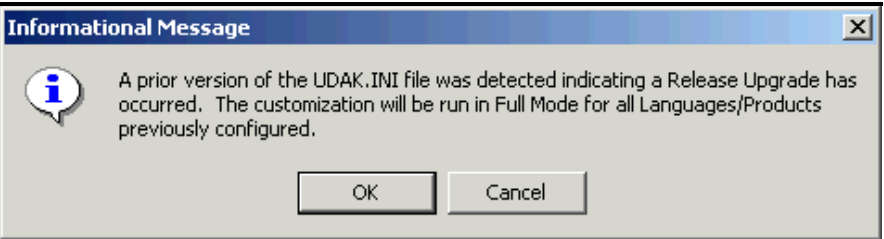
Enter the appropriate logon information and click OK to tailor your accounting key for all products except Consolidations and newly licensed products.

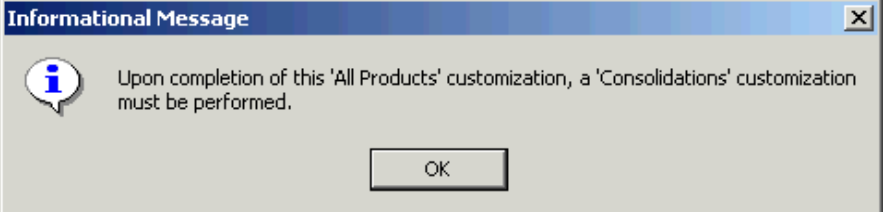
Run Mode field

Installation and Migration: Set to **Full - Process all UDAK objects for a given Product**.

Upgrade in Place: Set to **Special - Process the following class(es) of objects** and select **DataWindows** and **Scripts**.

Note: When you are migrating from an earlier release, the udak.ini file for your prior version is recognized, and UDAK.exe configures all products to match your user-defined key. Two informational messages are displayed.

| Step | Action |
|------|--|
| 4 |  <p>Informational Message</p> <p>A prior version of the UDAK.INI file was detected indicating a Release Upgrade has occurred. The customization will be run in Full Mode for all Languages/Products previously configured.</p> <p>OK Cancel</p> |



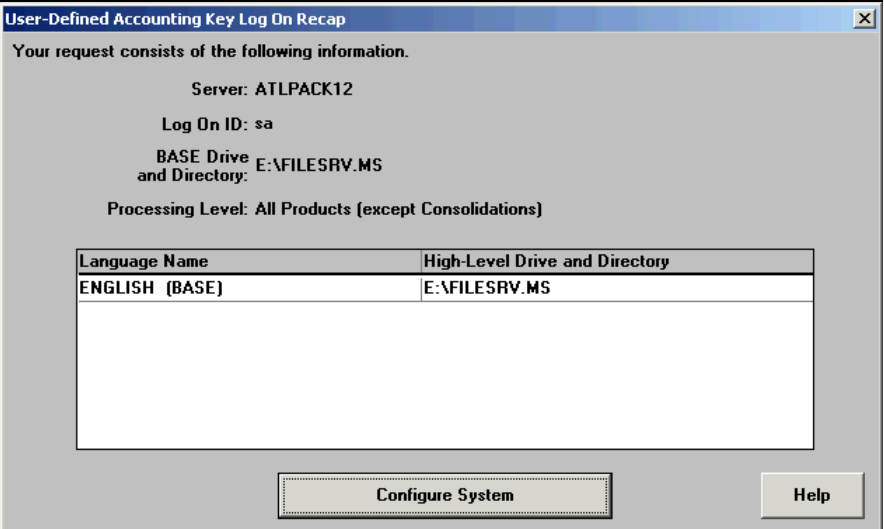
Informational Message

Upon completion of this 'All Products' customization, a 'Consolidations' customization must be performed.

OK

Click OK for both.

Result: The User-Defined Accounting Key Log On Recap window appears.

| 5 |  <p>User-Defined Accounting Key Log On Recap</p> <p>Your request consists of the following information.</p> <p>Server: ATLPACK12</p> <p>Log On ID: sa</p> <p>BASE Drive and Directory: E:\FILESRV.MS</p> <p>Processing Level: All Products (except Consolidations)</p> <table border="1"> <thead> <tr> <th>Language Name</th> <th>High-Level Drive and Directory</th> </tr> </thead> <tbody> <tr> <td>ENGLISH (BASE)</td> <td>E:\FILESRV.MS</td> </tr> </tbody> </table> <p>Configure System Help</p> | Language Name | High-Level Drive and Directory | ENGLISH (BASE) | E:\FILESRV.MS |
|----------------|---|---------------|--------------------------------|----------------|---------------|
| Language Name | High-Level Drive and Directory | | | | |
| ENGLISH (BASE) | E:\FILESRV.MS | | | | |

Click Configure System to begin tailoring your accounting key.

Result: The User-Defined Accounting Key Configuration Status window appears.

| Step | Action |
|------|--------|
| 6 | |

Go to Step 7 if you licensed Consolidations or UDAK.exe was run for Consolidations in your previous SmartStream release. If not, go to Step 8.

| | |
|---|--|
| 7 | |
|---|--|

Run **udak.exe** again for Consolidations.

- | | |
|---|--|
| 8 | Run udak.exe again if you have newly licensed products. |
| 9 | Run udak.exe again if Consolidations is newly licensed. |

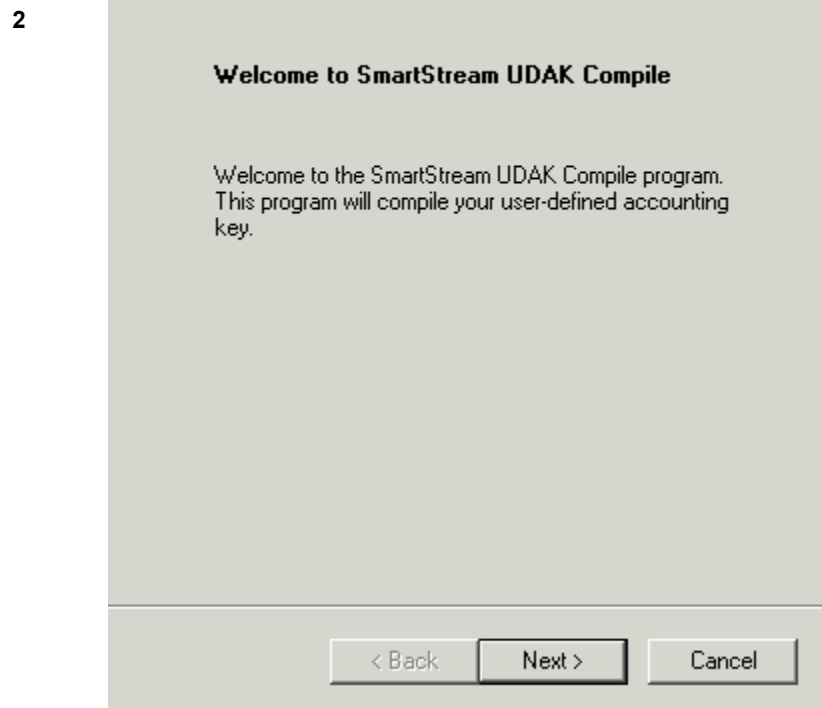
| Step | Action |
|------|---|
| 10 | Exit the UDAK program when you finish tailoring your user-defined accounting key for all products including Consolidations and newly licensed products. |

Compiling Your Accounting Key

Warning: When performing the **Upgrade in Place** process, **do not** run this program (dbms\udak\setup.exe) even if the udak.log file instructs you to run it, **or you will lose data.**

You can load the tables, views, stored procedures, and triggers tailored with your user-defined accounting key into the SmartStream databases by completing this procedure:

| Step | Action |
|------|--|
| 1 | Run setup.exe from the dbms\udak directory on your SmartStream file server. Note: The SmartStream UDAK Compile window appears. |



Click Next.

Result: The Database Server Information window appears.

| Step | Action |
|------|---|
| 3 | <p>Enter logon information for the database server where you want the UDAK compile to occur.</p> <p>Database Server Name: <input type="text" value="ATLPACK12"/></p> <p>System Administrator ID: <input type="text" value="sa"/></p> <p>Password: <input type="password" value="*****"/></p> <p style="text-align: right;"> <input style="margin-right: 10px;" type="button" value=" < Back "/> <input style="margin-right: 10px;" type="button" value=" Next > "/> <input style="margin-right: 10px;" type="button" value=" Cancel "/> </p> |

Enter the name and logon information for the database server where you want to run the compile process.

Result: The Product Selection window appears.

| | |
|---|--|
| 4 | <p>The following products are currently installed on ATLPACK12.</p> <p>Choose the products that you want the UDAK compile program to process.</p> <div style="border: 1px solid black; padding: 5px; min-height: 100px;"> <ul style="list-style-type: none"> Billing Budget Consolidations Euro Funds Control Ledger Payables Payroll Personnel Procurement Common </div> <p style="text-align: right; margin-top: 10px;"> <input style="margin-right: 10px;" type="button" value=" Select All "/> <input style="margin-right: 10px;" type="button" value=" Clear All "/> </p> <p style="text-align: right;"> <input style="margin-right: 10px;" type="button" value=" < Back "/> <input style="margin-right: 10px;" type="button" value=" Next > "/> <input style="margin-right: 10px;" type="button" value=" Cancel "/> </p> |
|---|--|

Select the products you want to process and click Next.

Result: The SmartStream UDAK Compile Summary window appears.

| Step | Action |
|------|--|
| 5 | <p>You made the following selections. Choose Back if you want to change any settings. Choose Next to begin the UDAK compile.</p> <p>Current Settings:</p> <p>Database Server: ATLPACK12 DBMS Type: MSS SA Role ID: sa</p> <p>The following products will be processed:</p> <ul style="list-style-type: none"> Shared Components Ledger Asset Management Consolidations Allocations <p>InstallShield</p> <p style="text-align: right;"> <input type="button" value=" < Back"/> <input type="button" value=" Next > "/> <input type="button" value=" Cancel"/> </p> |

Review your selections and click

- **Back** to change current settings
- **Next** to begin compiling customized objects.

Result: The SmartStream UDAK Compile window appears.

| | |
|---|---|
| 6 | <p>The Setup program has successfully executed SmartStream UDAK Compile.</p> <p style="text-align: right;"> <input type="button" value=" Exit"/> </p> |
|---|---|

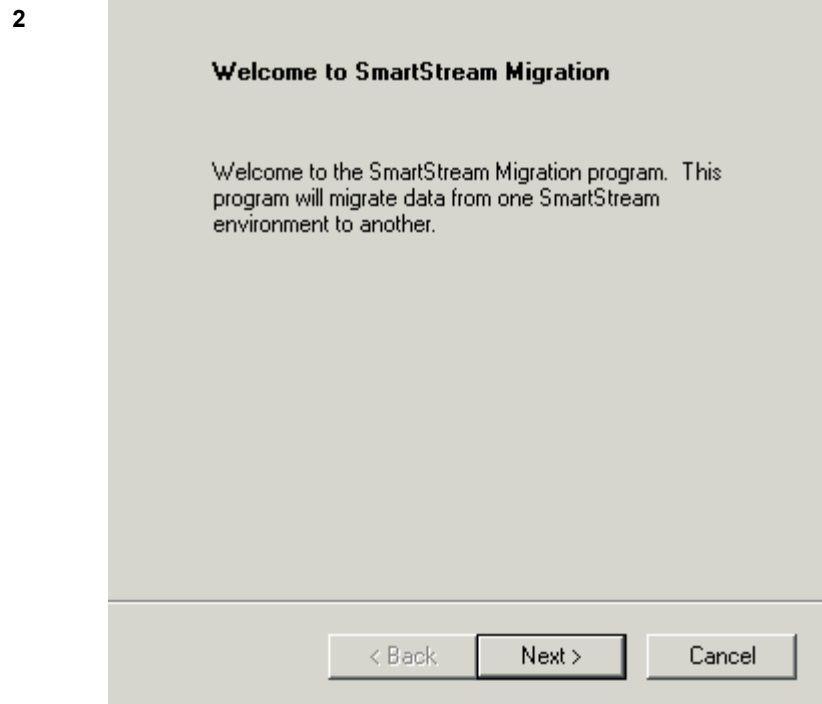
Click Exit.

Running the Migration Program

You can use the Migration program to export data from your current SmartStream environment and import it into the new SmartStream environment.

To run the migration process, complete this procedure:

| Step | Action |
|------|---|
| 1 | Run setup.exe from the dbms\smartmig directory on your SmartStream file server. |



Click Next.

Note: The Migration program exports data the first time you run setup.exe.

Result: The SmartStream Location On window appears.

| Step | Action |
|------|---|
| 3 | <p>The migration program exports data from your current environment.</p> <p>Select the directory on the file server where SmartStream is installed and the name of the environment you want to export.</p> <p>SmartStream File Server Path <input type="text" value="K:\From\hnp24s1.syb"/> <input type="button" value="Browse..."/></p> <p>SmartStream Environment <input type="text" value="Alpha Install to atlhnp24s1 UDAK'ed with all products less Ed Data"/></p> <p style="text-align: right;"> <input type="button" value=" < Back"/> <input type="button" value=" Next > "/> <input type="button" value=" Cancel"/> </p> |

Use Browse to find the directory that contains the dbsinst.ini file in the SmartStream environment that you are exporting data from, select the environment to export, and click Next.

Result: The Database Server Information window appears.

| | |
|---|--|
| 4 | <p>Enter logon information for the database server in the new environment.</p> <p>Database Server Name: <input type="text" value="ATLPAK12"/></p> <p>System Administrator ID: <input type="text" value="sa"/></p> <p>Password: <input type="text" value="xxxxxxx"/></p> <p style="text-align: right;"> <input type="button" value=" < Back"/> <input type="button" value=" Next > "/> <input type="button" value=" Cancel"/> </p> |
|---|--|

Enter the logon information for the database server from which you are exporting data and click Next.

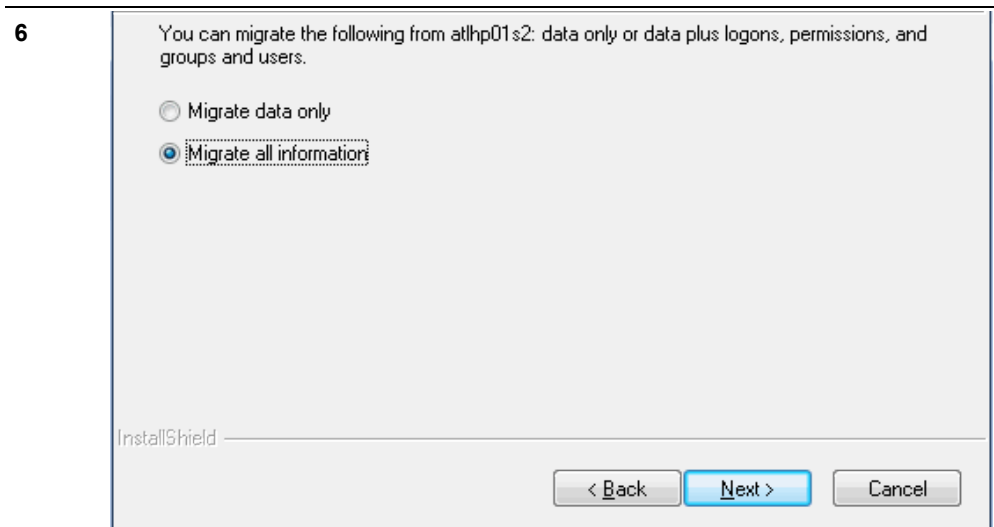
Result: The Product Selection window appears.

| Step | Action |
|------|--------|
| 5 | |

Select the products whose data you want to export and click Next.

Note: The SmartStream platform is listed as **SmartStream** in the list of available products.

Result: The Scope of Migration window appears



Select **Migrate all information**.

Result: The Export Summary window appears.

| Step | Action |
|------|---|
| | <p>You made the following selections to export SmartStream data. Choose Back if you want to change any settings. Choose Next to begin exporting.</p> <p>Current Settings:</p> <div data-bbox="613 363 1393 640" style="border: 1px solid gray; padding: 5px;"> <p>Migration Database Export Step</p> <p>Database Server: atlh24s1 DBMS Type: SYB SA Role ID: sa</p> <p>A full migration will be performed.</p> <p>The following products will be migrated:</p> <div style="border: 1px solid gray; height: 20px; width: 100%;"></div> </div> <p>InstallShield</p> <p style="text-align: right;"> <input data-bbox="1003 695 1127 730" type="button" value=" < Back "/> <input data-bbox="1130 695 1260 730" type="button" value=" Next > "/> <input data-bbox="1279 695 1409 730" type="button" value=" Cancel "/> </p> |

Review your selections and click

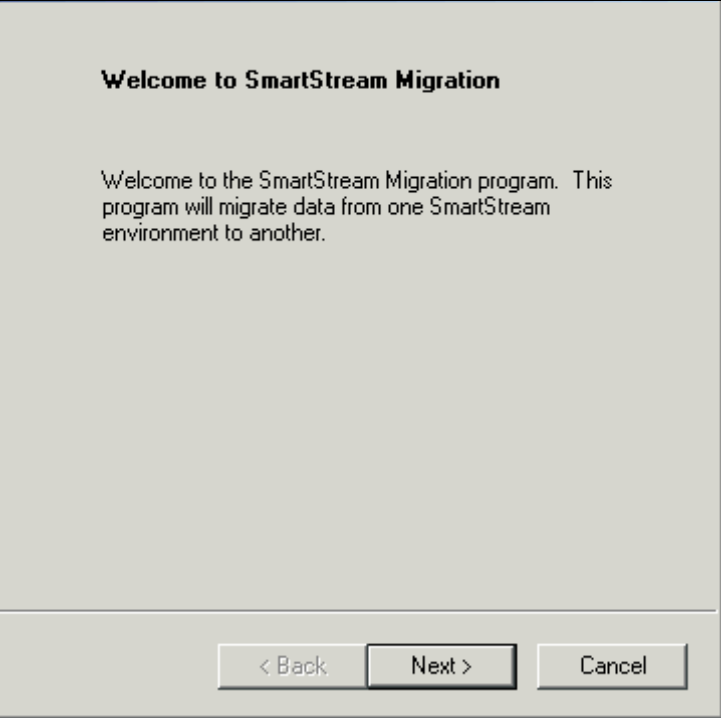
- **Back** to change settings
- **Next** to begin exporting data.

Result: The Migration Stage Complete window appears when processing is complete.

| | |
|----------|--|
| 7 | <p>The migration program has successfully exported data from atlh24s1.</p> <p>Run SmartStream Migration again to import this data into your new SmartStream environment.</p> <p style="text-align: right;"><input data-bbox="1279 1444 1409 1480" type="button" value=" Exit "/></p> |
|----------|--|

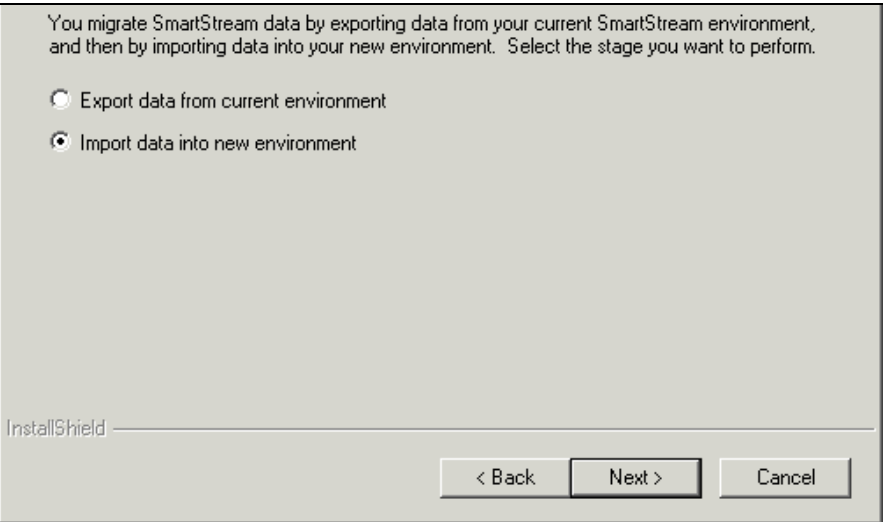
Click Exit.

| | |
|----------|--|
| 8 | Run setup.exe again to import data into the new environment. |
|----------|--|

| Step | Action |
|------|--|
| 9 |  |

Click Next.

Result: The Migration Stage window appears.

| | |
|----|--|
| 10 |  |
|----|--|

Select **Import data into new environment** and click Next.

Result: The Database Server Information window appears.

| Step | Action |
|------|---|
| 11 | <p>Enter logon information for the database server in the new environment.</p> <p>Database Server Name: <input type="text" value="ATLPACK12"/></p> <p>System Administrator ID: <input type="text" value="sa"/></p> <p>Password: <input type="password" value="xxxxxxx"/></p> <p style="text-align: right;"> <input style="margin-right: 10px;" type="button" value=" < Back "/> <input style="margin-right: 10px;" type="button" value=" Next > "/> <input style="margin-right: 10px;" type="button" value=" Cancel "/> </p> |

Enter the logon information for the database server that you are importing data into and click Next.

Result: The Product Selection window appears.

| | |
|----|--|
| 12 | <p>The following products have been exported from atlh24s1. Select the products that you want to import into ATLPACK12. Any data on ATLPACK12 associated with the selected products will be removed.</p> <div style="border: 1px solid black; background-color: #000080; color: white; padding: 5px;"> <ul style="list-style-type: none"> Payroll Personnel Procurement Common Projects Purchasing Receivables Receiving Shared Components SmartStream StreamBuilder </div> <p style="text-align: right;"> <input style="margin-right: 10px;" type="button" value=" Select All "/> <input style="margin-right: 10px;" type="button" value=" Clear All "/> </p> <p style="text-align: right;"> <input style="margin-right: 10px;" type="button" value=" < Back "/> <input style="margin-right: 10px;" type="button" value=" Next > "/> <input style="margin-right: 10px;" type="button" value=" Cancel "/> </p> |
|----|--|

Select the products whose data you want to import and click Next.

Result: The Import Summary window appears.

| Step | Action |
|------|--|
| 13 | <p>You made the following selections to import SmartStream data. Choose Back if you want to change any settings. Choose Next to begin importing.</p> <p>Current Settings:</p> <div style="border: 1px solid gray; padding: 5px;"> <p>Migration Database Import Step</p> <p>Database Server: ATLPACK12 DBMS Type: MSS SA Role ID: sa</p> <p>A full migration will be performed.</p> <p>Source of data to be imported:</p> <div style="border: 1px solid gray; height: 20px; width: 100%;"></div> </div> <p>InstallShield</p> <p style="text-align: right;"> <input style="margin-right: 10px;" type="button" value=" < Back "/> <input style="margin-right: 10px;" type="button" value=" Next > "/> <input style="margin-right: 10px;" type="button" value=" Cancel "/> </p> |

Review your selections and click

- **Back** to change settings
- **Next** to begin importing data into the new environment.

Result: The Migration Stage Complete window appears when processing is complete.

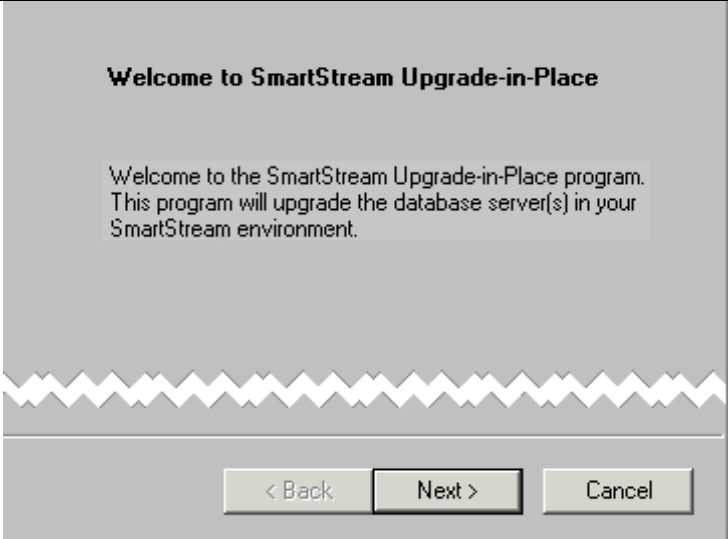
| | |
|----|---|
| 14 | <p>The migration program has successfully imported data into ATLPACK12.</p> <div style="border: 1px solid gray; height: 150px; width: 100%;"></div> <p style="text-align: right;"><input style="margin-right: 10px;" type="button" value=" Exit "/></p> |
|----|---|

Click Exit.

Running the Upgrade in Place Program

You can use the Upgrade in Place program instead of the Migration program if you want to upgrade your current SmartStream database server to the new release of SmartStream.

Complete this procedure to run the upgrade in place process:

| Step | Action |
|------|--|
| 1 | Run setup.exe from the dbms\upgrade directory on your SmartStream 7.0 file server. Result: The Welcome to SmartStream Upgrade-in-Place window appears. |
| 2 |  <p>Click Next.</p> Result: The Previous SmartStream File Server Location window appears |

| Step | Action |
|------|---|
| 3 | <p>The upgrade program needs to gather some data from your previous file server image in order to upgrade the database server.</p> <p>Select the directory on the file server where your previous version of SmartStream is installed and the name of the environment you are upgrading.</p> <p>SmartStream File Server Path <input type="text" value="K:\STE\w2k.syb"/> <input type="button" value="Browse..."/></p> <p>SmartStream Environment <input type="text" value="SmartStream"/></p> <p style="text-align: right;"> <input type="button" value=" < Back"/> <input type="button" value=" Next > "/> <input type="button" value=" Cancel"/> </p> |

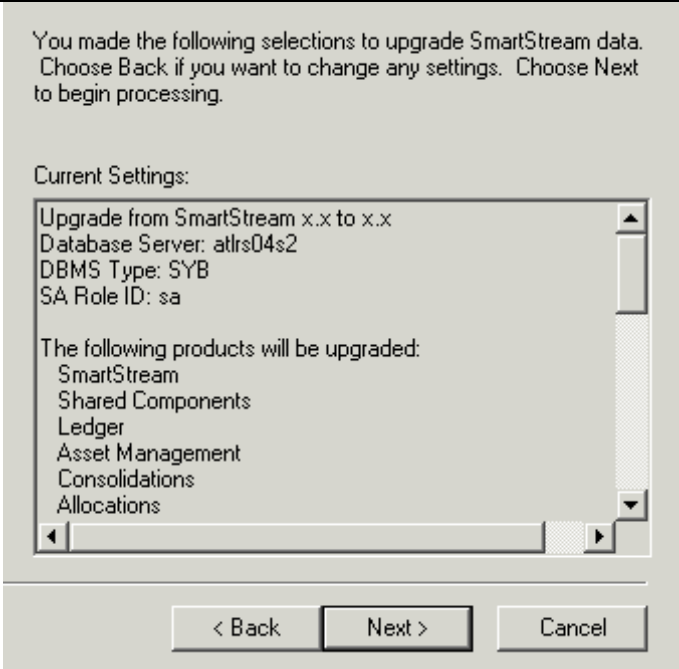
Use Browse to find the directory on the file server where your previous version of SmartStream was installed, select the environment to upgrade, and click Next.

Result: The Database Server Information window appears.

| | |
|---|--|
| 4 | <p>Enter logon information for the database server you want to upgrade.</p> <p>Database Server Name: <input type="text" value="atls04s2"/></p> <p>System Administrator ID: <input type="text" value="sa"/></p> <p>Password: <input type="password" value="xxxxxx"/></p> <p style="text-align: right;"> <input type="button" value=" < Back"/> <input type="button" value=" Next > "/> <input type="button" value=" Cancel"/> </p> |
|---|--|

Enter the logon information for the database server you are upgrading and click Next.

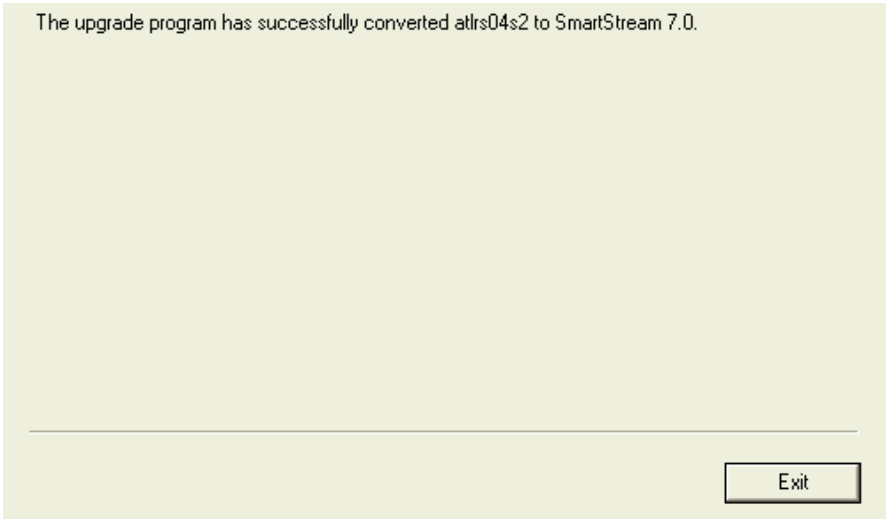
Result: The Upgrade Summary window appears.

| Step | Action |
|------|--|
| 5 | <p>You made the following selections to upgrade SmartStream data. Choose Back if you want to change any settings. Choose Next to begin processing.</p> <p>Current Settings:</p>  <p>< Back Next > Cancel</p> |

Review your selections and click

- **Back** to change settings
- **Next** to begin upgrading all SmartStream products installed on the database server.

Result: The Upgrade in Place Complete window appears when processing is complete.

| | |
|---|---|
| 6 | <p>The upgrade program has successfully converted atrs04s2 to SmartStream 7.0.</p>  <p>Exit</p> |
|---|---|

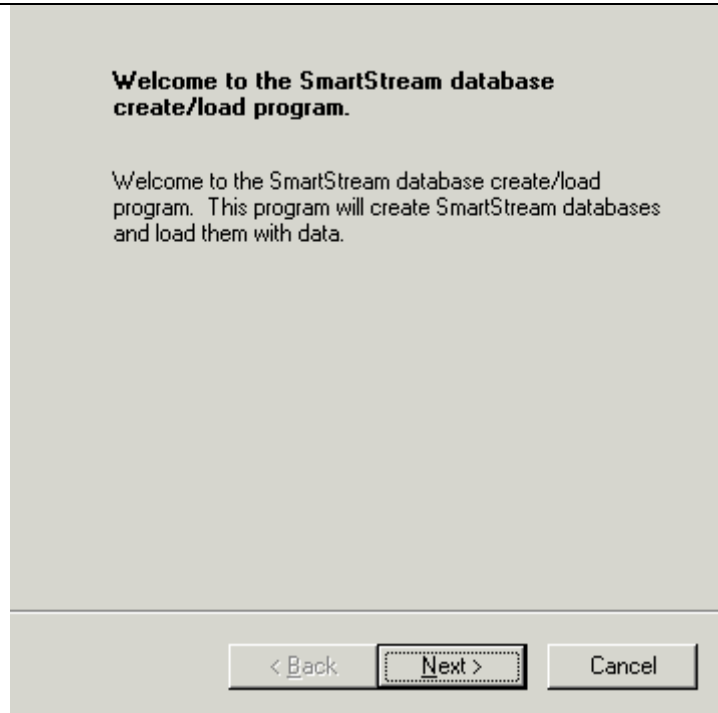
Click Exit.

Loading Databases for Newly Licensed Products

After you run the Migration **Import** program or the Upgrade in Place program, you must run the Database **Load** program for newly licensed products. Do not load education (sample) data.

| Step | Action |
|------|--|
| 1 | Run setup.exe from the <code>\createld</code> directory on the file server image. |

2



Click Next.

Result: Database Server window appears.

| Step | Action |
|------|--|
| 3 | <p>Enter login information for the SmartStream database server.</p> <p>Database Server Name: <input type="text" value="ATLPACK12"/></p> <p>System Administrator ID: <input type="text" value="sa"/></p> <p>Password: <input type="password" value="*****"/></p> <p style="text-align: right;"> <input style="margin-right: 10px;" type="button" value=" < Back "/> <input style="margin-right: 10px;" type="button" value=" Next > "/> <input style="margin-right: 10px;" type="button" value=" Cancel "/> </p> |

Enter the password for the database server.

Result: The Product Selection window appears.

| | |
|---|---|
| 4 | <p>Select the products whose data should be loaded.</p> <div style="border: 1px solid gray; padding: 5px;"> <ul style="list-style-type: none"> Allocations Asset Management Background Load <li style="background-color: #000080; color: white;">Billing Budget Connect Consolidations Euro Funds Control Items </div> <p style="text-align: right; margin-top: 10px;"> <input style="margin-right: 10px;" type="button" value=" Select All "/> <input style="margin-right: 10px;" type="button" value=" Clear All "/> </p> <p style="text-align: right;"> <input style="margin-right: 10px;" type="button" value=" < Back "/> <input style="margin-right: 10px;" type="button" value=" Next > "/> <input style="margin-right: 10px;" type="button" value=" Cancel "/> </p> |
|---|---|

Review the products selected for installation and clear the products you do not want to install.

Result: The Education Data window appears.

| Step | Action |
|------|---|
| 5 | <p>If you haven't modified your user-defined accounting key (UDAK), you can load both required and sample data. Would you like to load the sample data?</p> <p> <input type="radio"/> Yes, load both required and sample data <input checked="" type="radio"/> No, just load required data </p> <p style="text-align: right;">InstallShield</p> <p style="text-align: right;"> <input style="border: 1px solid black;" type="button" value=" < Back "/> <input style="border: 1px solid black;" type="button" value=" Next > "/> <input style="border: 1px solid black;" type="button" value=" Cancel "/> </p> |

You must select **No, just load required data**.

Result: The Database Load Summary window appears.

| | |
|---|---|
| 6 | <p>You made the following selections to load SmartStream databases. Choose Back if you want to change any settings. Choose Next to begin loading data.</p> <p>Current Settings:</p> <div style="border: 1px solid gray; padding: 5px;"> <p>Loading SmartStream Databases Loading without Education Data</p> <p>Database Server: ATLPACK12 DBMS Type: MSS SA Role ID: sa</p> <p>Databases for the following products will be processed: The following products will be processed: Billing</p> </div> <p style="text-align: right;">InstallShield</p> <p style="text-align: right;"> <input style="border: 1px solid black;" type="button" value=" < Back "/> <input style="border: 1px solid black;" type="button" value=" Next > "/> <input style="border: 1px solid black;" type="button" value=" Cancel "/> </p> |
|---|---|

Review your selections and click Next to begin loading the databases without sample, education data.

| Step | Action |
|------|---|
| 7 | Databases on ATLPACK12 have been successfully loaded with data.  |

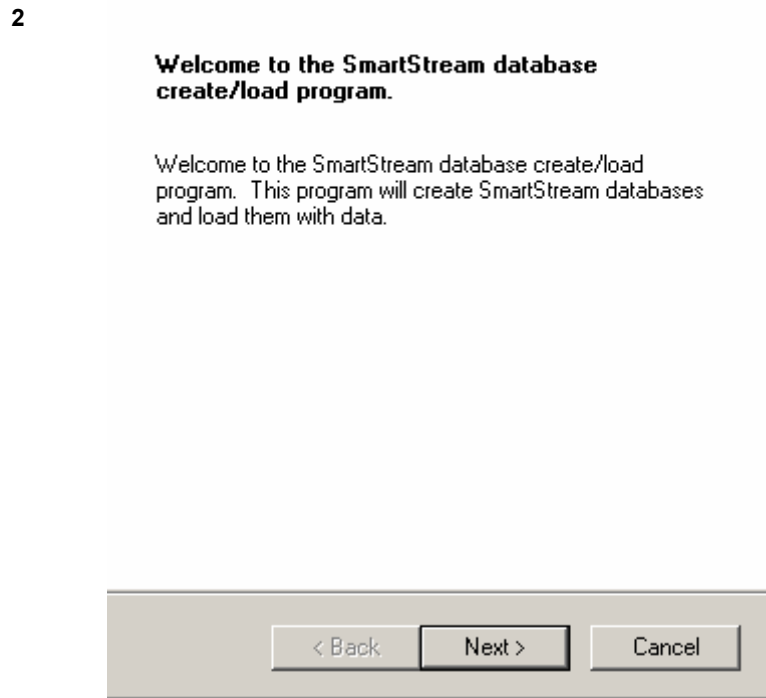
Click Exit when the Load program is complete.

Reloading SmartStream Language Kits

If you have licensed language kits for SmartStream 8.0, complete this procedure to reload each one.

Language versions of platform data (for example, error messages, file open parameters) are not automatically migrated. The migration process truncates all platform data and migrates it from the previous version to SmartStream 8.0. You must reload the language kits to reinstall language-specific platform data.

| Step | Action |
|------|--|
| 1 | Run setup.exe from the \createld directory at the root of the language kit file server image. Result: The Welcome to the SmartStream database create/load program window appears. |



Click Next.

Result: The SmartStream Environment window appears.

| Step | Action |
|------|---|
| 3 | <p>Select the directory where your base (English) SmartStream files are located on the file server and the name of the environment where databases will be loaded.</p> <p>SmartStream File Server Path <input type="text" value="K:\STE\w2k.syb"/> <input type="button" value="Browse..."/></p> <p>SmartStream Environment <input type="text" value="atldev02s1"/></p> <p><input type="button" value=" < Back"/> <input type="button" value=" Next > "/> <input type="button" value=" Cancel"/></p> |

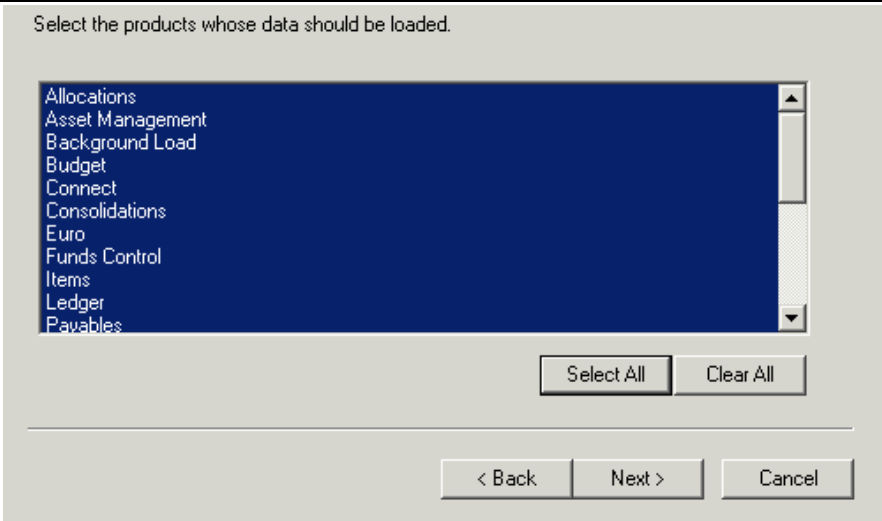
Enter the directory where SmartStream is installed on the file server, select an environment or type the name of a new environment that you want to create.

Result: The Database Server window appears.

| | |
|---|--|
| 4 | <p>Enter login information for the SmartStream database server.</p> <p>Database Server Name: <input type="text" value="atldev02s1"/></p> <p>System Administrator ID: <input type="text" value="sa"/></p> <p>Password: <input type="password" value="xxxxxxxx"/></p> <p><input type="button" value=" < Back"/> <input type="button" value=" Next > "/> <input type="button" value=" Cancel"/></p> |
|---|--|

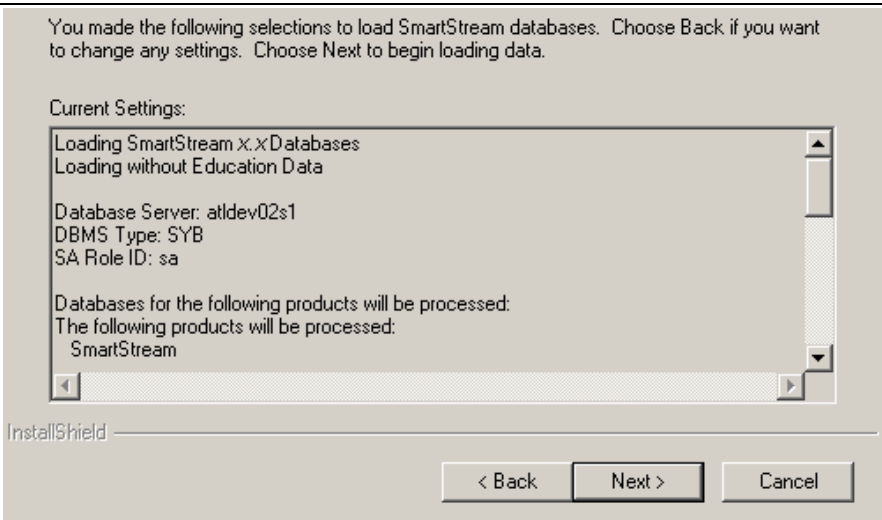
Enter information about the server where you want to load the language kit data and click Next.

Result: The Product Selection window appears.

| Step | Action |
|------|--|
| 5 | <p>Select the products whose data should be loaded.</p>  |

Use the buttons to choose the products that you want to install and click Next.

Result: The Database Load Summary window appears.

| | |
|---|---|
| 6 | <p>You made the following selections to load SmartStream databases. Choose Back if you want to change any settings. Choose Next to begin loading data.</p> <p>Current Settings:</p>  |
|---|---|

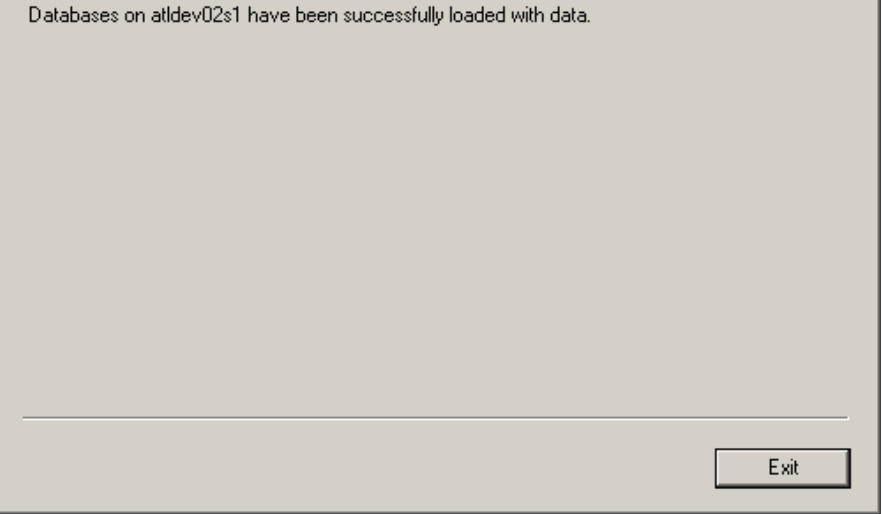
Review the selections you made.

- If you need to make changes, click **Back**.
- If you want to continue, click Next then **Finish**.

Result: The setup program begins loading data. If errors occur during processing, the Database Error Review window appears where you can

- Correct errors using the list of files and the Edit button. Then click **Retry**.
- Click **Cancel** to end the process without making the requested changes.

If no errors occur, the Database Operations window appears

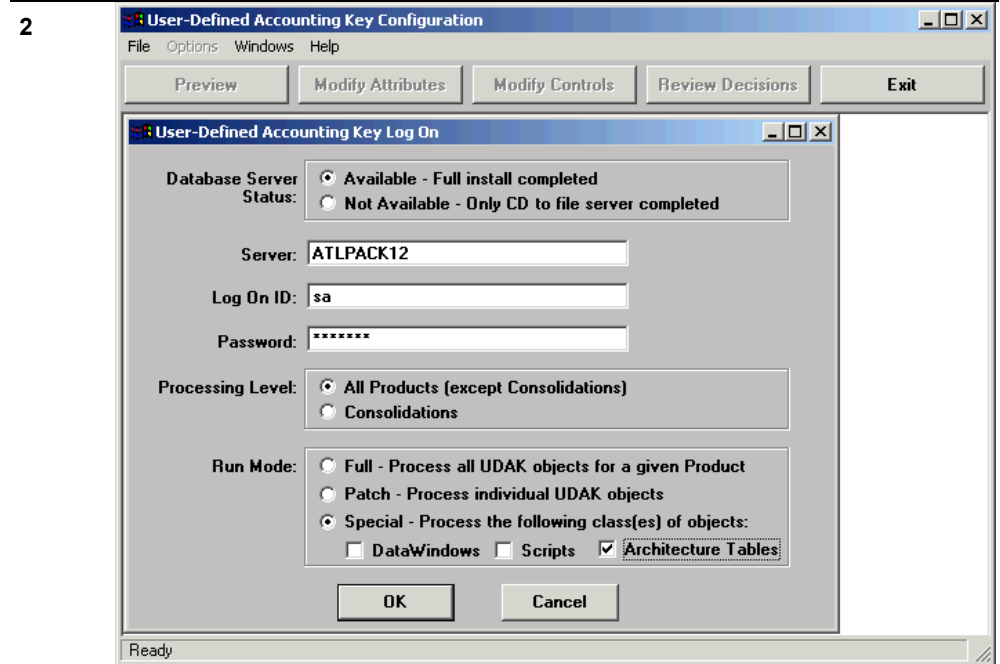
| Step | Action |
|------|--|
| 7 | <p data-bbox="589 258 1154 285">Databases on atldev02s1 have been successfully loaded with data.</p>  A screenshot of a dialog box with a light gray background. The text "Databases on atldev02s1 have been successfully loaded with data." is displayed at the top. At the bottom right, there is a button labeled "Exit". <p data-bbox="1323 709 1365 737">Exit</p> |

Click Exit.

Processing the Architecture Tables in Special Mode

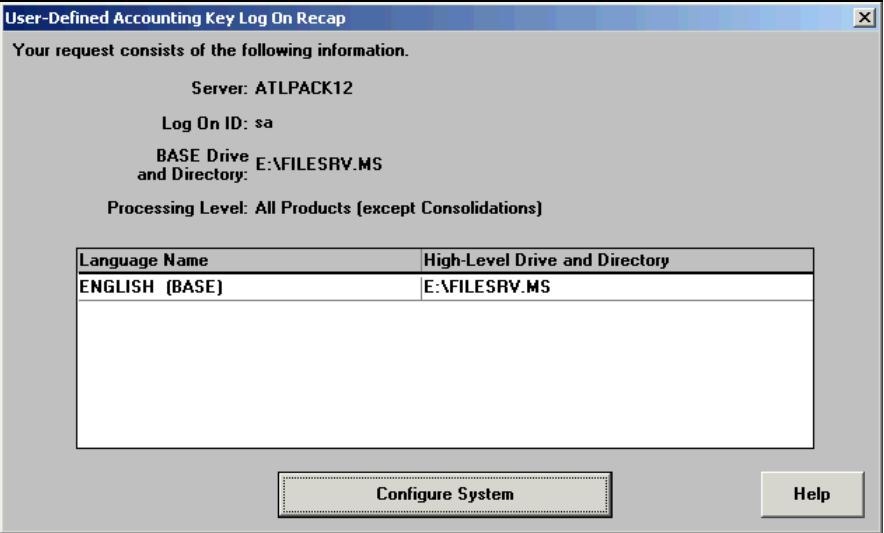
After you run the Migration Import program or the Upgrade in Place program, you must also update the architecture tables to reflect the new column names and lengths you defined if you tailored your accounting key.

| Step | Action |
|------|---|
| 1 | Run udak.exe from the dbmsludak directory on your SmartStream file server. Result: The User-Defined Accounting Key Log On window appears. |



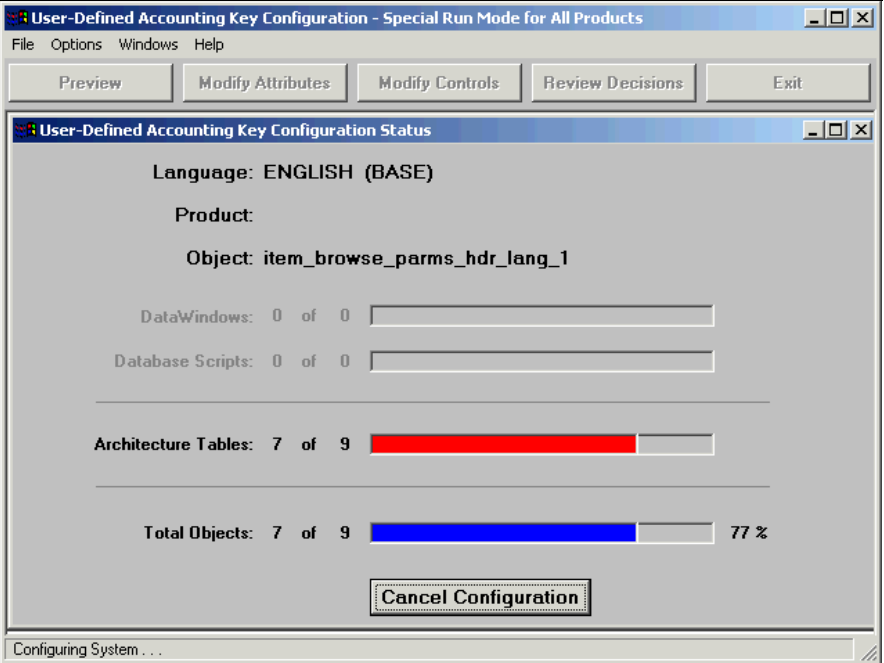
Select **All Products (except Consolidations)** the first time you run this process, and select **Special** and **Architecture Tables** as the run mode.

Result: The User-Defined Accounting Key Log On Recap window appears.

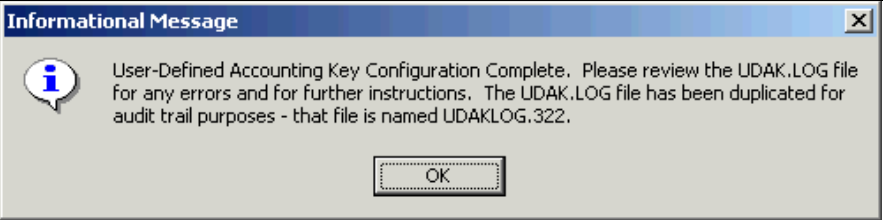
| Step | Action | | | | |
|----------------|--|---------------|--------------------------------|----------------|---------------|
| 3 |  <p>User-Defined Accounting Key Log On Recap</p> <p>Your request consists of the following information.</p> <p>Server: ATLPACK12</p> <p>Log On ID: sa</p> <p>BASE Drive and Directory: E:\FILESRV.MS</p> <p>Processing Level: All Products (except Consolidations)</p> <table border="1"> <thead> <tr> <th>Language Name</th> <th>High-Level Drive and Directory</th> </tr> </thead> <tbody> <tr> <td>ENGLISH (BASE)</td> <td>E:\FILESRV.MS</td> </tr> </tbody> </table> <p>Buttons: Configure System, Help</p> | Language Name | High-Level Drive and Directory | ENGLISH (BASE) | E:\FILESRV.MS |
| Language Name | High-Level Drive and Directory | | | | |
| ENGLISH (BASE) | E:\FILESRV.MS | | | | |

Click **Configure System** to tailor the system tables to reflect your user-defined accounting key.

Result: The **User-Defined Accounting Key Configuration Status** window appears.

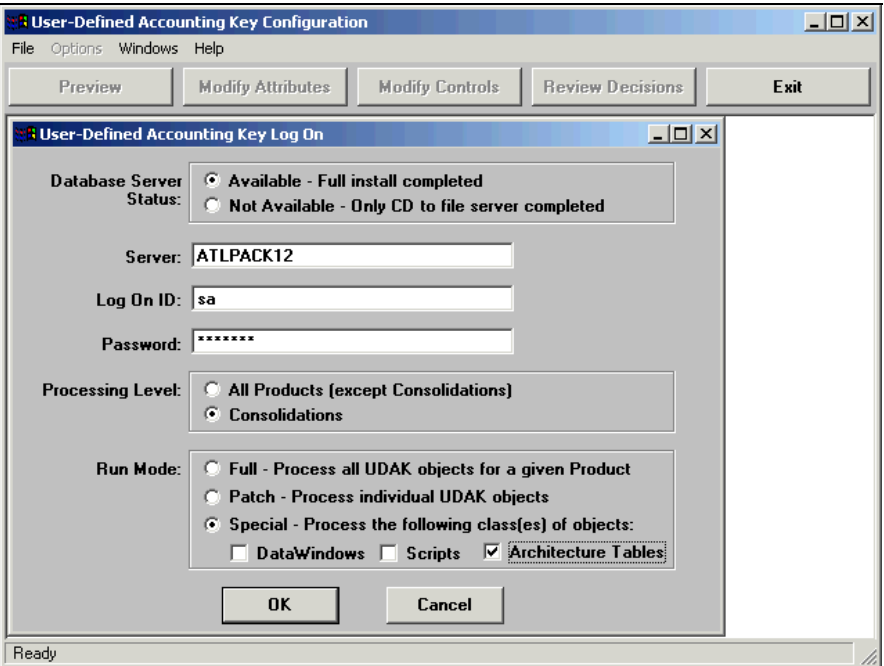
| | |
|---|---|
| 4 |  <p>User-Defined Accounting Key Configuration - Special Run Mode for All Products</p> <p>File Options Windows Help</p> <p>Buttons: Preview, Modify Attributes, Modify Controls, Review Decisions, Exit</p> <p>User-Defined Accounting Key Configuration Status</p> <p>Language: ENGLISH (BASE)</p> <p>Product: Object: item_browse_parms_hdr_lang_1</p> <p>DataWindows: 0 of 0</p> <p>Database Scripts: 0 of 0</p> <p>Architecture Tables: 7 of 9</p> <p>Total Objects: 7 of 9 77 %</p> <p>Buttons: Cancel Configuration</p> <p>Status bar: Configuring System . . .</p> |
|---|---|

When processing is complete, an informational message is displayed.

| Step | Action |
|------|---|
| 5 |  <p>The dialog box is titled "Informational Message" and contains the following text: "User-Defined Accounting Key Configuration Complete. Please review the UDAK.LOG file for any errors and for further instructions. The UDAK.LOG file has been duplicated for audit trail purposes - that file is named UDAKLOG.322." There is an "OK" button at the bottom center.</p> |

Click OK.

Note: You can review **UDAK.log** for errors and further instructions.

| | |
|---|--|
| 6 |  <p>The dialog box is titled "User-Defined Accounting Key Configuration" and has a menu bar with "File", "Options", "Windows", and "Help". It contains several sections:</p> <ul style="list-style-type: none"> Database Server Status: Radio buttons for "Available - Full install completed" (selected) and "Not Available - Only CD to file server completed". Server: Text box containing "ATLPACK12". Log On ID: Text box containing "sa". Password: Text box containing "*****". Processing Level: Radio buttons for "All Products (except Consolidations)" and "Consolidations" (selected). Run Mode: Radio buttons for "Full - Process all UDAK objects for a given Product", "Patch - Process individual UDAK objects", and "Special - Process the following class(es) of objects:" (selected). Under "Special", there are checkboxes for "DataWindows", "Scripts", and "Architecture Tables" (checked). <p>Buttons for "OK" and "Cancel" are at the bottom. The status bar at the bottom left says "Ready".</p> |
|---|--|

Run **udak.exe** again for Consolidations.

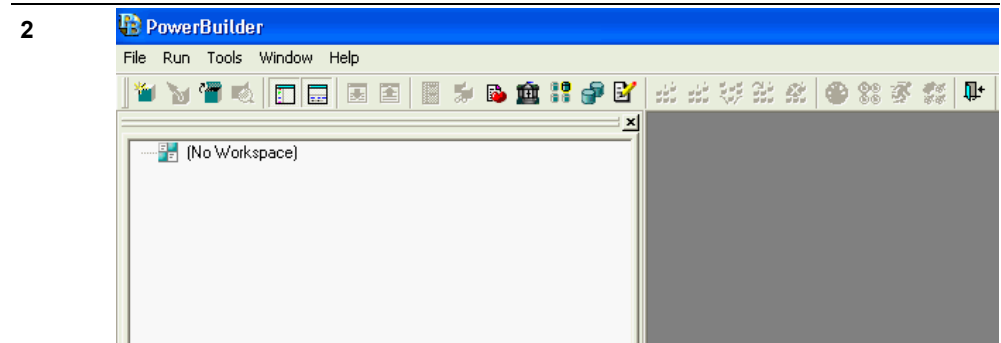
Note: You must select **Special** and **Architecture Tables** as the run mode.

Regenerating the Runtime Library

After applying your user-defined accounting key, you must regenerate the runtime library (udak.pbd).

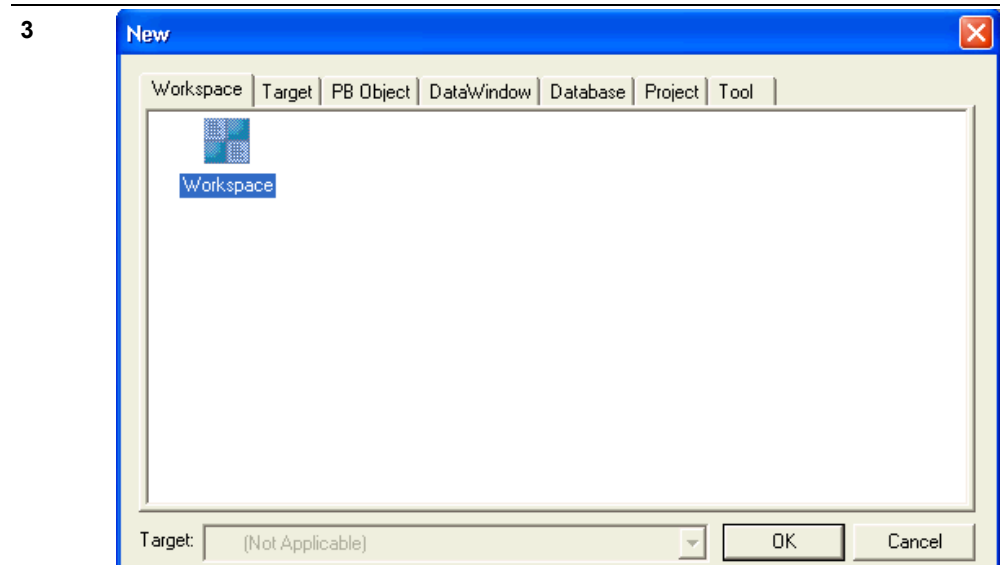
To generate the runtime library, complete this procedure:

| Step | Action |
|------|--|
| 1 | Open PowerBuilder. Note: If you need help generating the dynamic runtime library for your user-defined accounting key, open a case on the Infor Concierge Portal and attach the udak.pbl file that resides in the \ss directory of your SmartStream file server to it. |



On the File menu, click New.

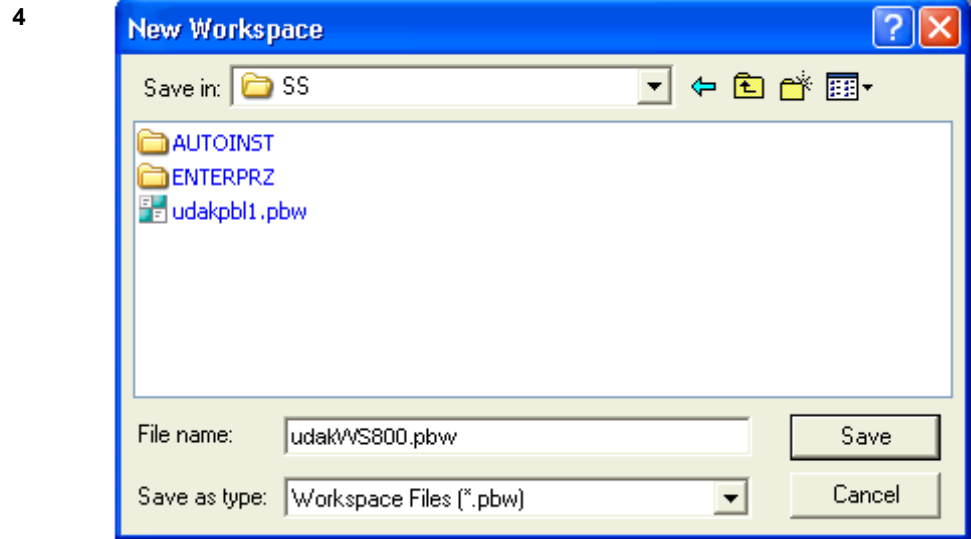
Result: The New dialog box appears.



On the Workspace tab, click the Workspace button and click OK.

Result: The New Workspace dialog box appears.

| Step | Action |
|------|--------|
|------|--------|



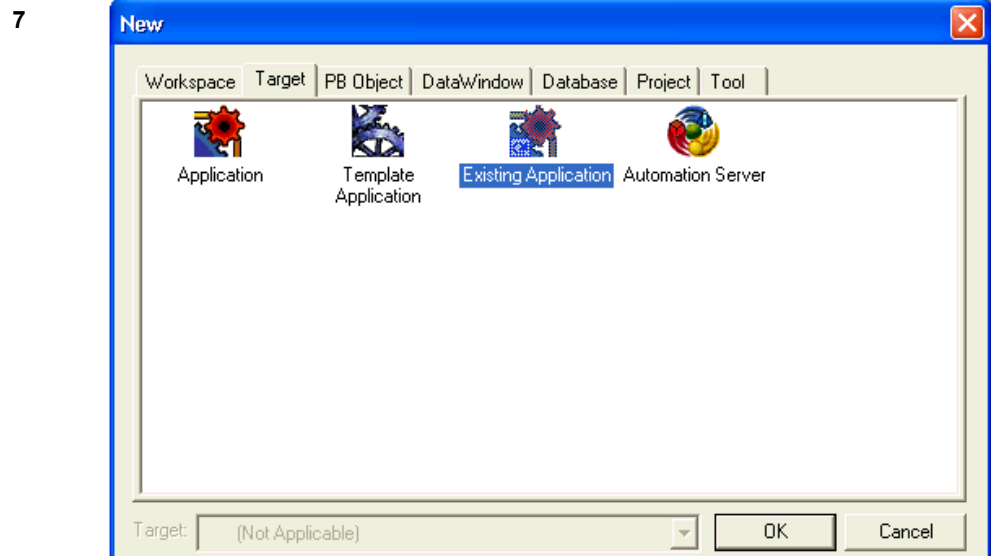
Select the **lss** directory on your SmartStream file server as the target directory, name the workspace **udakWS800.pbw**, and click **Save**.

Result: The **udakWS800.pbw** workspace is created in the directory you selected. The dialog box closes and the main PowerBuilder window is available again.

| | |
|---|--------------------------|
| 5 | Click the new workspace. |
|---|--------------------------|

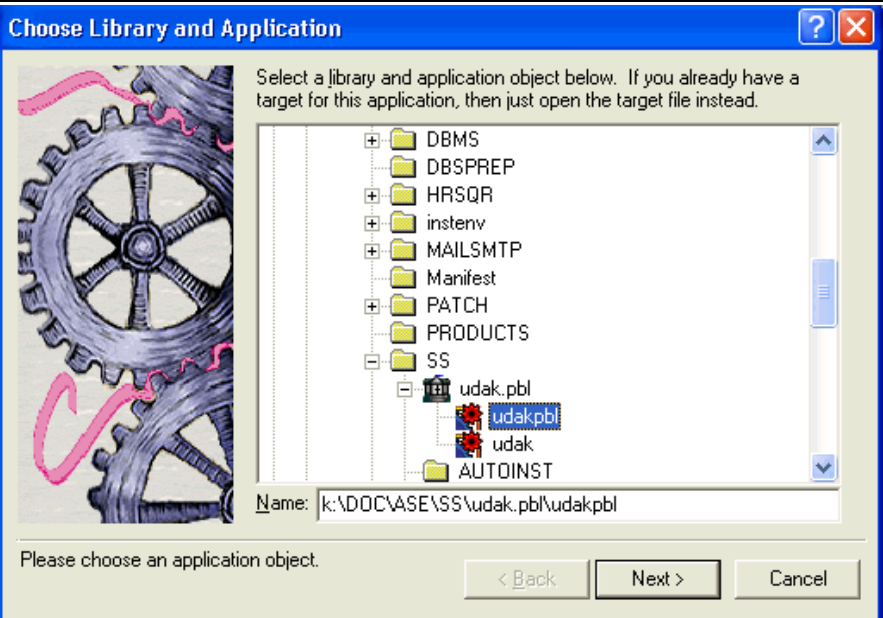
| | |
|---|--------------------------------------|
| 6 | On the File menu, click New . |
|---|--------------------------------------|

Result: The **New** dialog box appears.



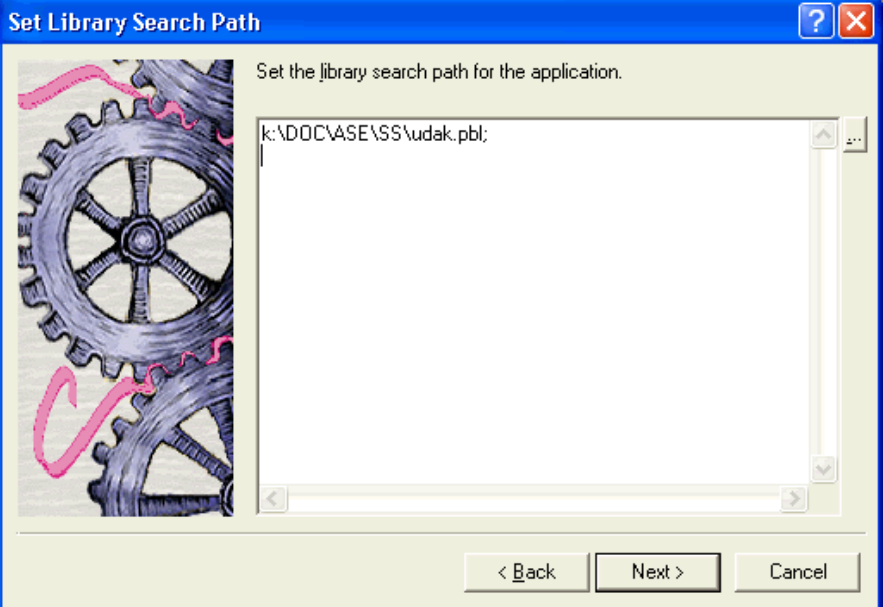
On the **Target** tab, click the **Existing Application** button and click **OK**.

Result: The **Choose Library and Application** dialog box appears.

| Step | Action |
|------|---|
| 8 |  <p>Select a library and application object below. If you already have a target for this application, then just open the target file instead.</p> <p>Please choose an application object.</p> |

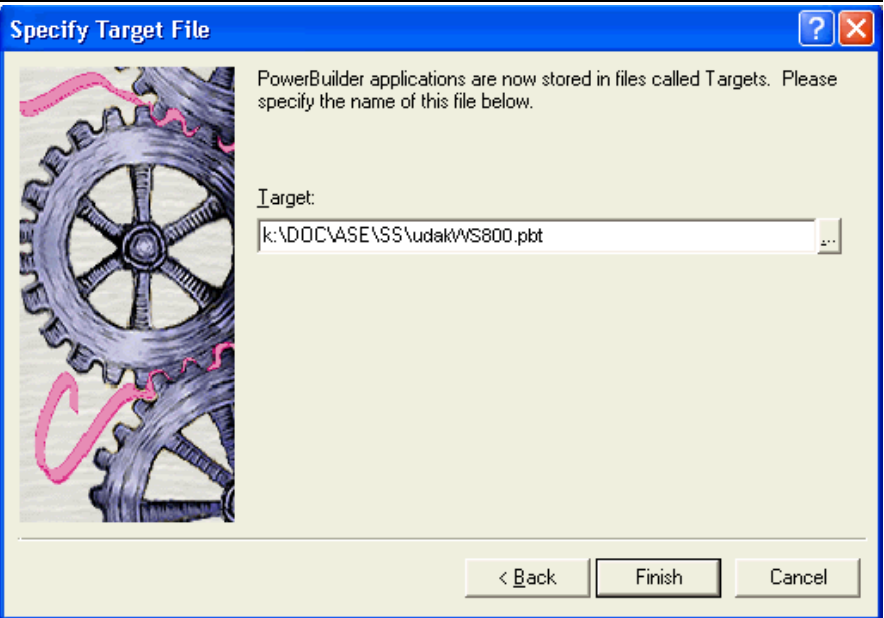
Expand the **ss** directory and then the **udak.pbl Library**, click the **udakpbl** application, and then click Next.

Result: The Set Library Search Path dialog box appears.

| | |
|---|---|
| 9 |  <p>Set the library search path for the application.</p> <p>k:\DOC\ASE\SS\udak.pbl;</p> |
|---|---|

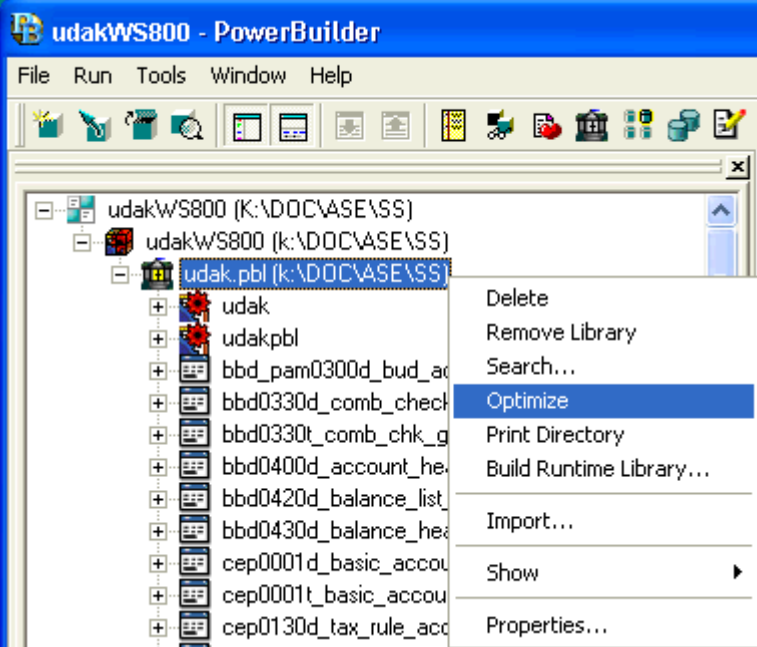
Accept the default and click Next.

Result: The Specify Target File dialog box appears.

| Step | Action |
|------|--|
| 10 |  |

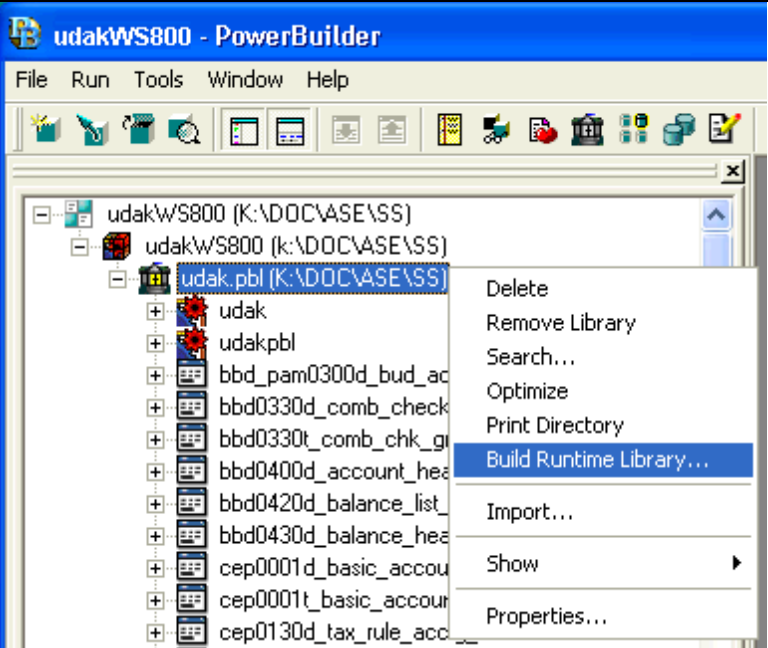
Name the target file udakWS800.pbt and click Finish.

Result: The dialog box closes and the main PowerBuilder window is available again.

| | |
|----|---|
| 11 |  |
|----|---|

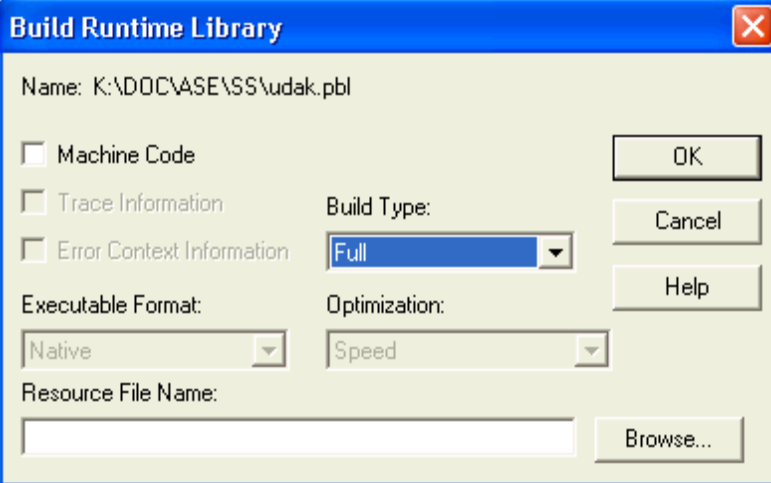
Expand your workspace then your target, right-click udak.pbl, and click Optimize.

Result: If the Library Backup Replacement confirmation prompt is displayed, click Yes. The main PowerBuilder window is available again.

| Step | Action |
|------|---|
| 12 |  <p>The screenshot shows the PowerBuilder IDE window titled 'udakWS800 - PowerBuilder'. The menu bar includes 'File', 'Run', 'Tools', 'Window', and 'Help'. The main workspace displays a project tree for 'udakWS800 (K:\DOC\ASE\SS)'. The file 'udak.pbl (K:\DOC\ASE\SS)' is selected, and a context menu is open over it. The menu items are: Delete, Remove Library, Search..., Optimize, Print Directory, Build Runtime Library... (highlighted), Import..., Show, and Properties...</p> |

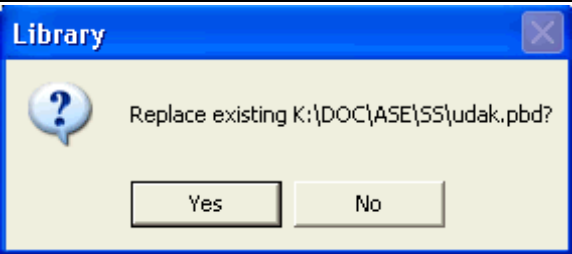
Right-click `udak.pbl` and click `Build Runtime Library`.

Result: The `Build Runtime Library` dialog box appears.

| | |
|----|---|
| 13 |  <p>The screenshot shows the 'Build Runtime Library' dialog box. The 'Name' field contains 'K:\DOC\ASE\SS\udak.pbl'. There are three unchecked checkboxes: 'Machine Code', 'Trace Information', and 'Error Context Information'. The 'Build Type' dropdown is set to 'Full'. The 'Executable Format' dropdown is set to 'Native' and the 'Optimization' dropdown is set to 'Speed'. The 'Resource File Name' field is empty, with a 'Browse...' button to its right. There are 'OK', 'Cancel', and 'Help' buttons on the right side of the dialog.</p> |
|----|---|

Complete the settings as follows and click `OK`:

- Clear the `Machine Code` check box if checked.
- Select **Full** as the build type.
- Leave `Resource File Name` field blank.

| Step | Action |
|------|---|
| 14 |  <p>At the Replace existing <i>path</i>/udak.pbd? prompt, click Yes.</p> <p>Result: The Runtime Library (udak.pbd) is built.</p> |

Tip

If the Machine Code check box is not cleared, PowerBuilder generates udak.dll instead of udak.pbd. Repeat steps 12 through 14 and clear the Machine Code check box.

Language Kits

You must perform this process for the udak.pbd in each language kit **ss** directory.

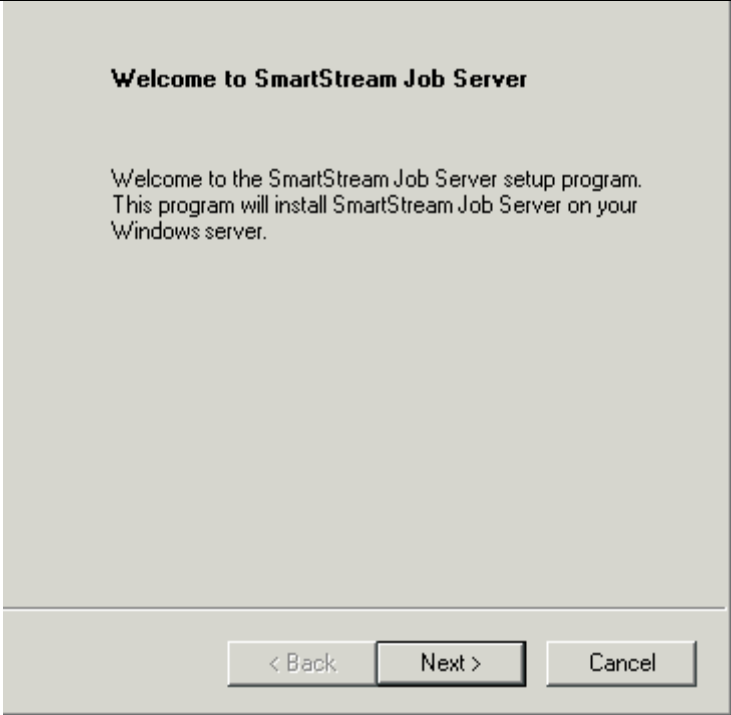
Installing the Job Server

The Windows version of the Job Server installation program installs the Master Scheduler, Poll, and ARPC programs as Windows services. The UNIX versions share a large amount of code with the Windows version, so the look and feel of the user interface is very similar for both versions.

Windows

If you are installing the Windows version, you must run the setup program from the workstation where you want to install the Job Server, and you must log on as a user with administrator authority.

To install this version of the Job Scheduler, complete this procedure:

| Step | Action |
|------|---|
| 1 | Run setup.exe from the batch\os directory, where os is the operating system of the Job Server you want to install. Result: The Welcome to SmartStream Job Server window appears. |
| 2 |  <p>Click Next.</p> <p>Result: The Destination Directory window appears.</p> |

| Step | Action |
|------|---|
| 3 | <p>You can choose the destination directory where SmartStream Job Server programs are installed.</p> <p>Click Next to accept the default directory.</p> <p>Click Browse to choose another directory.</p> <p>Destination Folder C:\sstrmxx\Batch\ <input type="button" value="Browse..."/></p> <p>InstallShield</p> <p><input type="button" value=" < Back"/> <input type="button" value=" Next > "/> <input type="button" value=" Cancel"/></p> |

Use Browse to find the directory where you want to install the Job Server and click Next.

Result: The Database Server Information window appears.

| | |
|---|--|
| 4 | <p>Enter the log on information for the database server running the Master Scheduler Program.</p> <p>Database Server Name: <input type="text" value="ATLPACK12"/></p> <p>System Administrator ID: <input type="text" value="sa"/></p> <p>Password: <input type="text" value="*****"/></p> <p><input type="button" value=" < Back"/> <input type="button" value=" Next > "/> <input type="button" value=" Cancel"/></p> |
|---|--|

Enter the name and logon information for the database server and click Next.

Note: Database server information is stored in the dbsched.ini file. You can change this information later by running the psc0030 program.

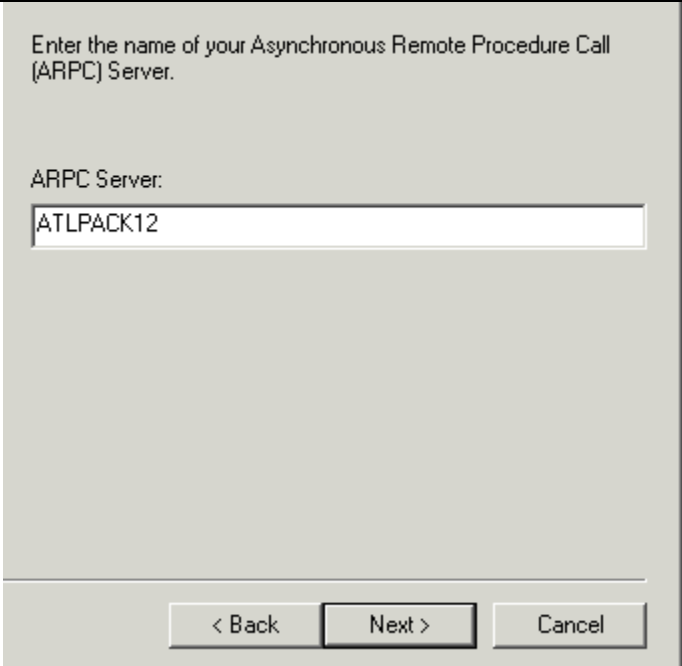
Result: The Poll Information window appears.

| Step | Action |
|------|---|
| 5 | <p>Enter the name of the Poll program and the path used by the Poll program to find the Job Server table.</p> <p>Poll Name: <input type="text" value="POLL05"/></p> <p>Path: <input type="text" value="*"/></p> <p>< Back Next > Cancel</p> |

Enter the Poll information and click Next.

Note: Poll information is also stored in the dbsched.ini file.

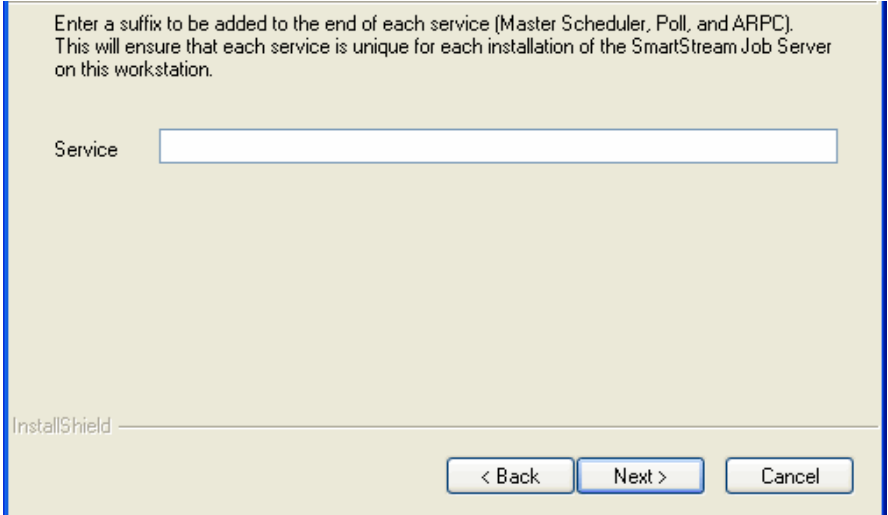
Result: The ARPC Server Name window appears.

| Step | Action |
|------|---|
| 6 |  <p>Enter the name of your Asynchronous Remote Procedure Call (ARPC) Server.</p> <p>ARPC Server:</p> <input type="text" value="ATLPACK12"/> <p>< Back Next > Cancel</p> |

Enter the name of the ARPC server and click Next.

Note: ARPC information is also stored in the dbsched.ini file.

Result: The Service Name window appears.

| | |
|---|--|
| 7 |  <p>Enter a suffix to be added to the end of each service (Master Scheduler, Poll, and ARPC). This will ensure that each service is unique for each installation of the SmartStream Job Server on this workstation.</p> <p>Service <input type="text"/></p> <p>InstallShield</p> <p>< Back Next > Cancel</p> |
|---|--|

Enter a suffix to add to the name of the Master Scheduler, Poll, and ARPC services to ensure that the service names are unique for each installation of the Job Server on a workstation and click Next.

Result: The Start Copying Files window appears.

| Step | Action |
|------|---|
| 8 | <p>Setup has enough information to start copying the program files. If you want to review or change any settings, click Back. If you are satisfied with the settings, click Next to begin copying files.</p> <p>Current Settings:</p> <p>SmartStream File Server Directory: E:\FileSrv.ms\ Destination Directory: E:\batch</p> <p>Application Settings: TSDX Table Server: ATLPACK12 Login User ID: sa Poll Name: POLL05 Path for Job Server Table: * ARPC Server: ATLPACK12</p> <p>InstallShield</p> <p>< Back Next > Cancel</p> |

Review your settings and click Next

Result: When the Job Server installation finishes, the Job Server Setup Complete window appears.

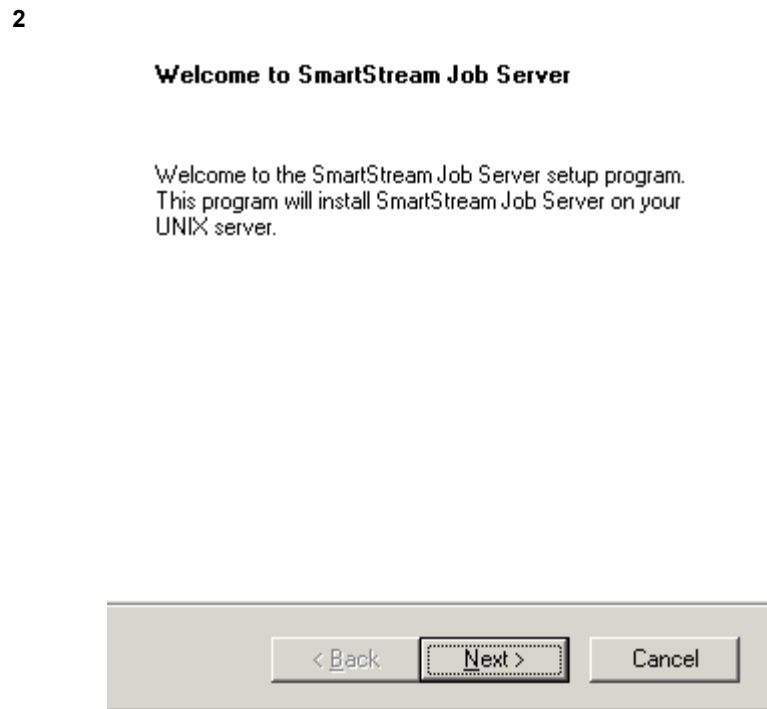
| | |
|---|---|
| 9 | <p>The Setup program has successfully installed SmartStream Job Server.</p> <p>Exit</p> |
|---|---|

Click Exit.

UNIX

To install one of the UNIX versions of the Job Scheduler, complete these steps:

| Step | Action |
|------|---|
| 1 | Run setup.exe from the batch\os directory, where os is the operating system of the Job Server you want to install. Result: The Welcome to SmartStream Job Server window appears. |



Click Next.

Result: The UNIX Server Information window appears.

| Step | Action |
|------|--|
| 3 | <p>Enter information about the server running UNIX where you want to install SmartStream Job Server.</p> <p>UNIX Host Name: <input type="text" value="atlsn22"/></p> <p>Logon User ID: <input type="text" value="connect"/></p> <p>Password: <input type="text"/></p> <p style="text-align: right;"><input type="button" value=" < Back"/> <input type="button" value=" Next > "/></p> |

Enter logon information for the UNIX host where you want to install the Job Server and click Next.

| | |
|---|--|
| 4 | <p>Enter the destination directory on atlsn22 where the Job Server files should be installed.</p> <p>Location of SmartStream Job Server files: <input type="text" value="/ssxx/REG/sun"/></p> <p style="text-align: right;"><input type="button" value=" < Back"/> <input type="button" value=" Next > "/></p> |
|---|--|

Enter the directory where you want to install the Job Server and click Next.

Note: This directory is usually relative to the home directory of the user specified in Step 3.

Result: The Database Server Information window appears.

| Step | Action |
|------|--|
| 5 | <p>Enter the log on information for the database server running the Master Scheduler Program.</p> <p>Database Server Name: <input type="text" value="atlsn05s1"/></p> <p>System Administrator ID: <input type="text" value="DBS"/></p> <p>Password: <input type="text"/></p> <p style="text-align: right;"><input data-bbox="1000 732 1133 770" type="button" value=" < Back "/> <input data-bbox="1138 732 1271 770" type="button" value=" Next > "/> <input data-bbox="1295 732 1429 770" type="button" value=" Cancel "/></p> |

Enter the name and logon information for the database server and click Next.

Note: Database server information is stored in the dbsched.ini file. You need to run the psc0030 program to update this information after installing the Job Server.

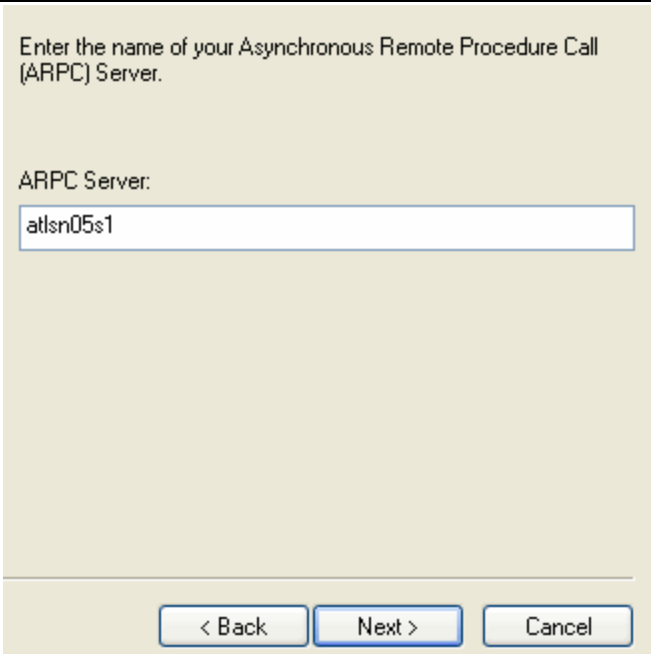
Result: The Poll Information window appears.

| | |
|---|---|
| 6 | <p>Enter the name of the Poll program and the path used by the Poll program to find the Job Server table.</p> <p>Poll Name: <input type="text" value="SUNPOLL"/></p> <p>Path: <input type="text" value="*"/></p> <p style="text-align: right;"><input data-bbox="724 1602 873 1640" type="button" value=" < Back "/> <input data-bbox="878 1602 1027 1640" type="button" value=" Next > "/> <input data-bbox="1052 1602 1201 1640" type="button" value=" Cancel "/></p> |
|---|---|

Enter the Poll information and click Next.

Note: Poll information is also stored in the dbsched.ini file.

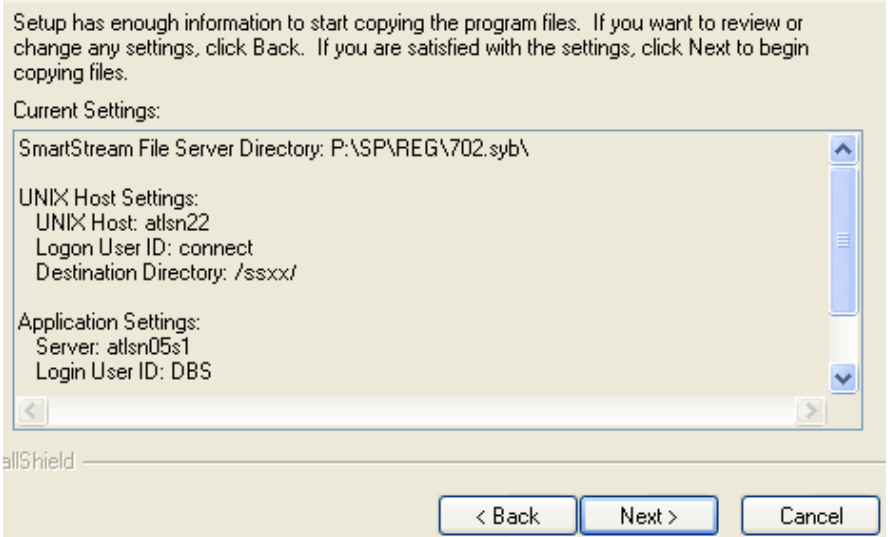
Result: The ARPC Server Name window appears.

| Step | Action |
|------|---|
| 7 |  <p>Enter the name of your Asynchronous Remote Procedure Call (ARPC) Server.</p> <p>ARPC Server:</p> <p>atlsn05s1</p> <p>< Back Next > Cancel</p> |

Enter the name of the ARPC server and click Next.

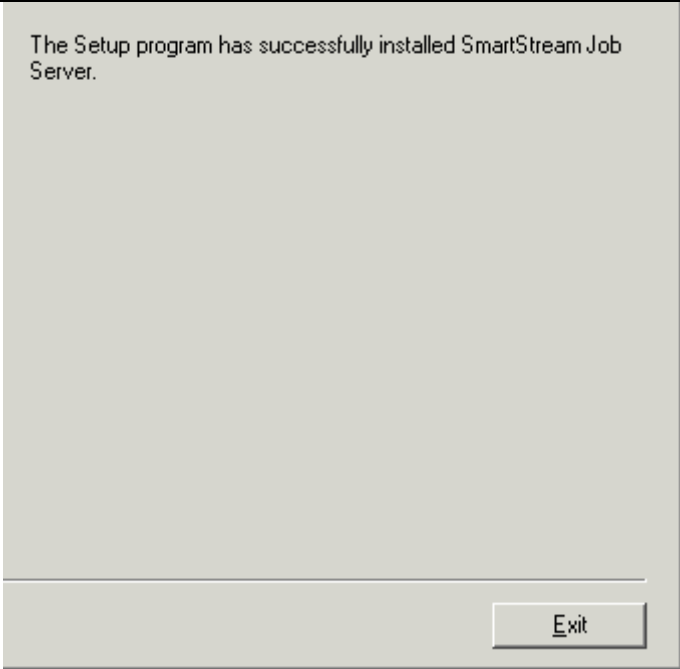
Note: ARPC information is also stored in the dbsched.ini file.

Result: The Start Copying Files window appears.

| | |
|---|---|
| 8 |  <p>Setup has enough information to start copying the program files. If you want to review or change any settings, click Back. If you are satisfied with the settings, click Next to begin copying files.</p> <p>Current Settings:</p> <p>SmartStream File Server Directory: P:\SP\REG\702.syb\ UNIX Host Settings: UNIX Host: atlsn22 Logon User ID: connect Destination Directory: /ssxx\ Application Settings: Server: atlsn05s1 Login User ID: DBS</p> <p>< Back Next > Cancel</p> |
|---|---|

Review your settings and click Next

Result: When the Job Server installation finishes, the Job Server Setup Complete window appears.

| Step | Action |
|------|---|
| 9 | <p data-bbox="586 279 1179 331">The Setup program has successfully installed SmartStream Job Server.</p>  |

Click Exit.

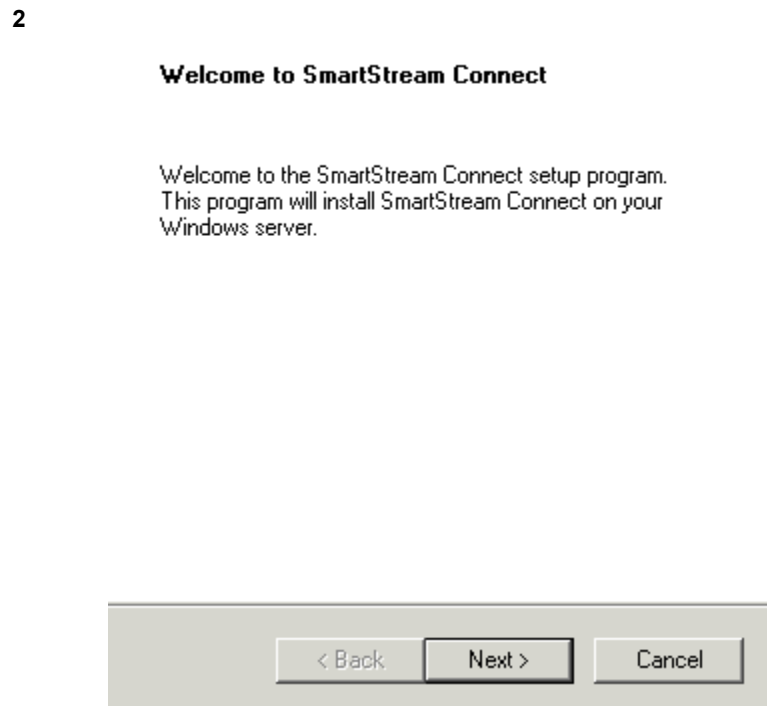
Installing SmartStream Connect

If you are installing SmartStream Connect, you must install it **after** you install the Job Server. The SmartStream Connect installation copies the contents of the SmartStream Connect directory to your Job Server installation.

Windows

If you are installing the Windows version of SmartStream Connect, you must run the setup program from the workstation where the Job Server is installed and complete this procedure:

| Step | Action |
|------|---|
| 1 | Run setup.exe from the connect\os directory on the SmartStream file server, where os is the operating system of the Job Server installation to which you want to add SmartStream Connect. Result: The Welcome to SmartStream Connect window appears. |



Click Next.

Result: The SmartStream Job Server Location window appears.

| Step | Action |
|------|---|
| 3 | <p>SmartStream Job Server has been installed in the following locations. Select the location where you want to install SmartStream Connect.</p> <div style="border: 1px solid gray; padding: 5px; margin: 10px 0;"> <p>C:\SS\<math>x\</math>batch C:\sstrm\<math>x\</math>Batch\</p> </div> <p style="text-align: right;"> <input style="margin-right: 10px;" type="button" value=" < Back "/> <input style="margin-right: 10px;" type="button" value=" Next > "/> <input style="margin-right: 10px;" type="button" value=" Cancel "/> </p> |

If you installed Job Server in more than one directory on the current workstation, choose the location where you want to install Connect and click Next.

Result: The Installation Settings window appears.

| | |
|---|---|
| 4 | <p>You made the following selections to install SmartStream Connect. Choose Back if you want to change any settings. Choose Next to begin installation.</p> <p>Current Settings:</p> <div style="border: 1px solid gray; padding: 5px; margin: 10px 0;"> <p>SmartStream File Server Directory: P:\ind\<math>x\</math>nt.mss\ Destination Directory: C:\SS\<math>x\</math>batch</p> </div> <p style="text-align: right;"> <input style="margin-right: 10px;" type="button" value=" < Back "/> <input style="margin-right: 10px;" type="button" value=" Next > "/> <input style="margin-right: 10px;" type="button" value=" Cancel "/> </p> |
|---|---|

Review your selections and click

- **Back** to change settings
- **Next** to begin the installation.

Post Installation Tasks Use a system administrator's utility to ensure that the user ID for the SmartStream Connect server connects to the database server.

Installing the Mail Gateway

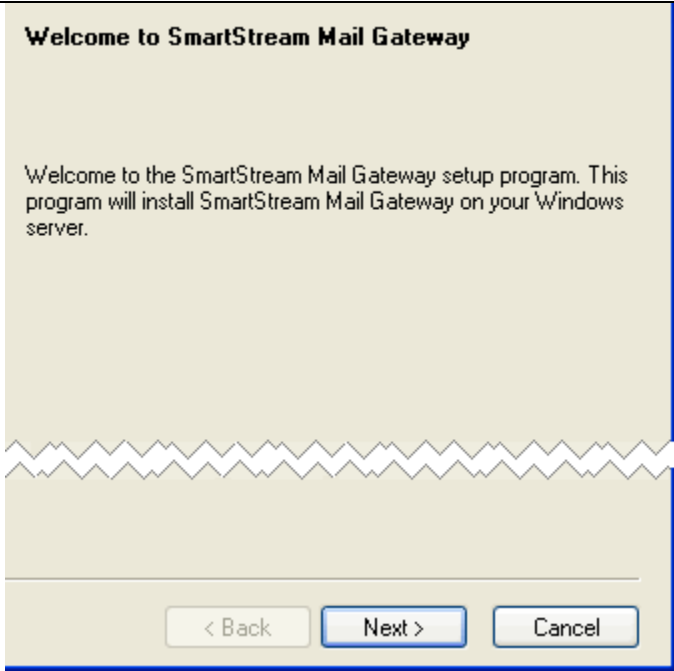
The Mail Gateway provides a connection between the

- Job Scheduler and your email system
- Workflow and your email system if you use SmartStream Mail-enabled To Do tasks.

Unlike Mail Gateway in previous releases, the SmartStream Mail Gateway Setup program now installs the Mail Gateway on a workstation as a system service.

Running the Mail Gateway Setup Program

Complete this procedure to install the Mail Gateway:

| Step | Action |
|------|--|
| 1 | Run setup.exe from the mailgate directory on the SmartStream file server. Result: The Welcome to SmartStream Mail Gateway window appears. |
| 2 |  <p>Click Next.</p> <p>Result: The SmartStream Environment window appears.</p> |

| Step | Action |
|------|--|
| 3 | <p>Setup must have access to the directory where SmartStream is installed on the file server</p> <p>Select the directory where SmartStream is installed and the name of the environment you want to work in.</p> <p>SmartStream File Server Path <input type="text" value="P:\smartstream"/> <input type="button" value="Browse..."/></p> <p>SmartStream Environment <input type="text" value="SmartStream Server"/></p> <p style="text-align: right;"> <input type="button" value=" < Back"/> <input type="button" value=" Next > "/> <input type="button" value=" Cancel"/> </p> |

Specify the environment where you want the Mail Gateway installed and click Next.

Result: The Destination Directory window appears.

| | |
|---|---|
| 5 | <p>Choose the destination directory where SmartStream Mail Gateway programs are installed.</p> <p>Click Next to accept the default directory.</p> <p>Click Browse to choose another directory.</p> <p>Destination Folder <input type="text" value="C:\MailGate\"/> <input type="button" value="Browse..."/></p> <p>InstallShield</p> <p style="text-align: right;"> <input type="button" value=" < Back"/> <input type="button" value=" Next > "/> <input type="button" value=" Cancel"/> </p> |
|---|---|

Select the destination directory and click Next.

Result: The Service Name window appears.

| Step | Action |
|------|--|
| | <p>Enter the name of the windows Service.</p> <p>Service: <input type="text" value="SSMailGate"/></p> <p>InstallShield _____</p> <p>< Back Next > Cancel</p> |

Enter the name of the Windows service for Mail Gateway and click Next.

Result: The Mail Directory window appears.

| | |
|---|---|
| 6 | <p>The SmartStream Mail Gateway checks for files that need to be delivered. Enter the directory where these files are found.</p> <p>Directory: <input type="text" value="C:\MAILDIR"/></p> <p>InstallShield _____</p> <p>< Back Next > Cancel</p> |
|---|---|

Enter the directory where you want SmartStream to put files to deliver using electronic mail and click Next.

Result: The Mail Host Information window appears.

| Step | Action |
|------|--|
| 7 | <p>Enter the Mail Host Domain and Port Information</p> <p>Domain: <input type="text" value="mail.corporate.server.com"/></p> <p>Port Addr: <input type="text" value="25"/></p> <p>InstallShield _____</p> <p><input type="button" value=" < Back"/> <input type="button" value=" Next > "/> <input type="button" value=" Cancel"/></p> |

Enter the name and port number of your enterprise mail server and click Next.

Result: The Mail Sender Information window appears.

| | |
|---|---|
| 8 | <p>Enter information for the Mailgate Sender</p> <p>Name: <input type="text" value="SmartStream Mailgate"/></p> <p>Email Addr: <input type="text" value="donotreply@mailgate.com"/></p> <p>InstallShield _____</p> <p><input type="button" value=" < Back"/> <input type="button" value=" Next > "/> <input type="button" value=" Cancel"/></p> |
|---|---|

Enter the sender name and email address for your Mail Gateway and click Next.

Result: The Mail Admin Information window appears.

| Step | Action |
|------|---|
| 9 | <p>Enter information for the Mailgate Administrator</p> <p>Name: <input type="text" value="MIS Administrator"/></p> <p>Email Addr: <input type="text" value="MIS@yourcompany.com"/></p> <p>InstallShield _____</p> <p><input data-bbox="1003 705 1127 741" type="button" value=" < Back "/> <input data-bbox="1133 705 1256 741" type="button" value=" Next > "/> <input data-bbox="1279 705 1403 741" type="button" value=" Cancel "/></p> |

Enter the name and email address of your Mail Gateway administrator and click Next.

Result: The Mail Check Interval window appears.

| | |
|----|---|
| 10 | <p>Enter the interval in minutes that the Mail Gateway checks for new mail.</p> <p>Interval: <input type="text" value="5"/></p> <p>InstallShield _____</p> <p><input data-bbox="1003 1356 1127 1392" type="button" value=" < Back "/> <input data-bbox="1133 1356 1256 1392" type="button" value=" Next > "/> <input data-bbox="1279 1356 1403 1392" type="button" value=" Cancel "/></p> |
|----|---|

Enter the number of minutes (up to 59) you want the Mail Gateway to wait between checks for new mail and click Next.

Result: The Mail Gateway Log File window appears.

| Step | Action |
|------|--|
| 11 | <p>The Mail Gateway maintains a log of its actions. Enter the file specification for the log.</p> <p>Log: <input type="text" value="C:\MailGate\MAILGATE.LOG"/></p> <p>InstallShield _____</p> <p>< Back Next > Cancel</p> |

Enter the path and name for the log file that stores processing and error information during the operation of the Mail Gateway, and click Next.

The default is *drive:\mailgate\mailgate.log*.

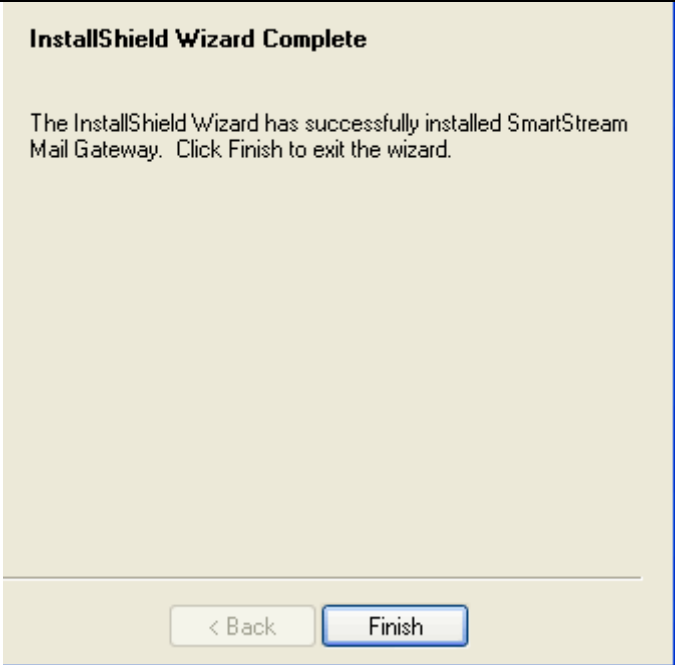
Result: SmartStream Mail Gateway Summary window appears.

| | |
|----|---|
| 12 | <p>You made the following selections. Choose Back if you want to change any settings. Choose Next to begin the installation.</p> <p>Current Settings:</p> <p>Destination Directory: C:\MailGate\ Mail Service Name: SSMailGate2 Mail Directory: C:\MAILDIR Log File: C:\MailGate\MAILGATE.LOG Check Mail Interval: 5 Mail Host Domain Name: mail.corporate.server.com Mail Host Port: 25</p> <p>InstallShield _____</p> <p>< Back Next > Cancel</p> |
|----|---|

Review your selections and click

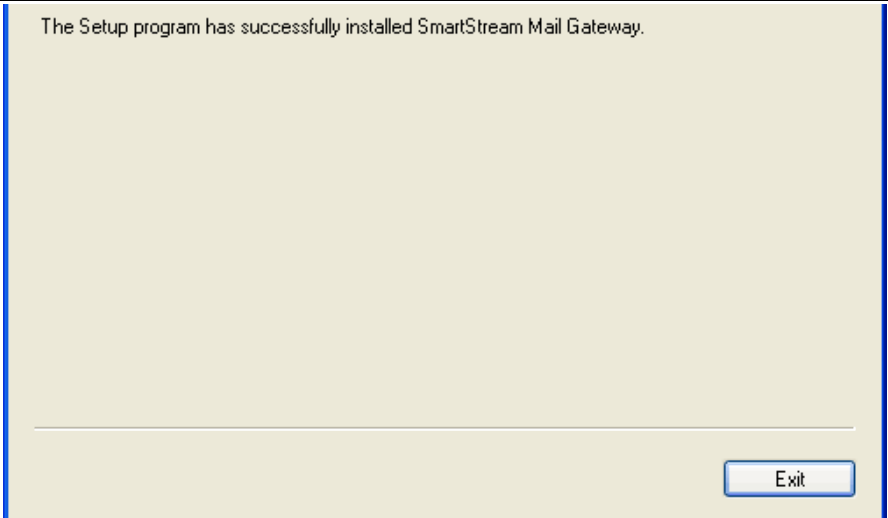
- **Back** to change settings
- **Next** to begin the installation.

Result: The InstallShield Wizard Complete window appears when processing is complete.

| Step | Action |
|------|--|
| 13 |  <p>InstallShield Wizard Complete</p> <p>The InstallShield Wizard has successfully installed SmartStream Mail Gateway. Click Finish to exit the wizard.</p> <p>< Back Finish</p> |

Click Finish.

Result: The Mail Gateway Setup window appears.

| | |
|----|--|
| 14 |  <p>The Setup program has successfully installed SmartStream Mail Gateway.</p> <p>Exit</p> |
|----|--|

Click Exit.

Setting Up ALLTAX and Payroll Regulatory Reporting

If you install SmartStream Payroll, you must also complete the setup of ALLTAX and Payroll regulatory reporting.

| Step | Action |
|------|--|
| 1 | Open the Control Panel System utility and click the Advanced tab. |
| 2 | Click the Environment Variables button. Result: The Environment Variables dialog box appears. |
| 3 | Define the following user variables: <ul style="list-style-type: none"> ▪ alltax2\taxdata\taxref\at001ref ▪ alltax2\taxdata\taxsrc\at001clc Note: For UNIX environments, confirm that these environment variables are in .profile . |
| 4 | Use the Control Panel Printers utility to add a local printer. |
| 5 | Run hralltax.bat from the batch directory. |
| 6 | Use the Control Panel ODBC Data Source Administrator utility to define ODBC settings for Microsoft SQL Server or Sybase. |
| 7 | Open the Regulatory Report Format Control window. |
| 8 | Select the Apply New Format Control Records action. Results: The hpyrvu01.exe program <ul style="list-style-type: none"> ▪ Copies the new format control records from the /staged/ directory to the DBShrpn database ▪ Adds error and status messages about this process to the hpyrvu01.log and hpyrvu01.rpt files ▪ Archives the new format control records to keep a history of all records added to the database. |
| 9 | Verify that the new control records are correctly applied to the DBShrpn database by using any text editor to open the hpyrvu01.rpt file residing in the batch directory and review any error and status messages generated while Payroll processed the format control records. |
| 10 | Use a SQL editor to add printer names to the printer_id_tbl table in the DBShrpn database. |

Configuring Master Scheduler, Poll, and ARPC

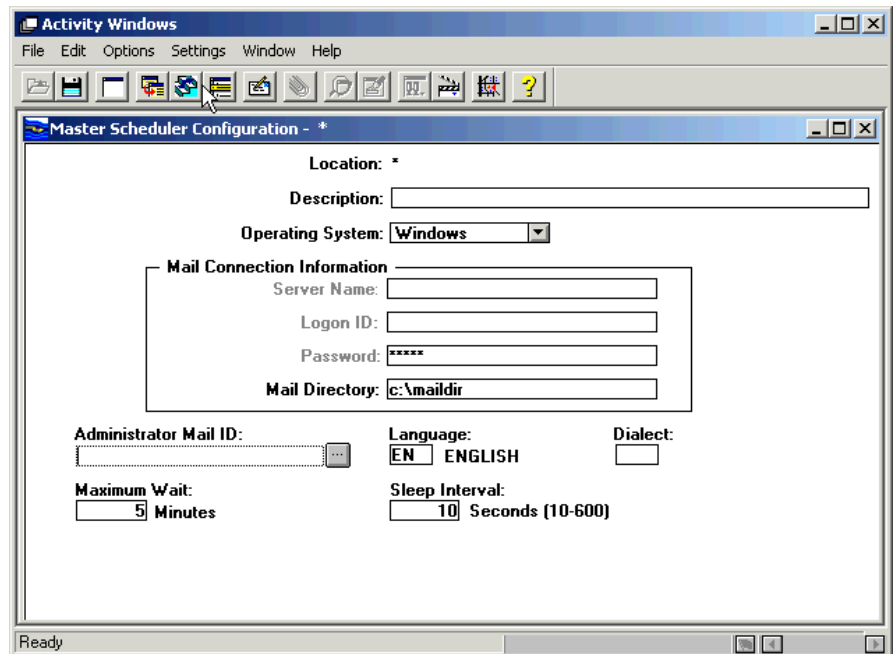
This table shows the process for configuring Master Scheduler, Poll, and ARPC:

| Stage | Description |
|-------|--|
| 1 | Using SmartStream, configure Master Scheduler, Poll, and ARPC. |
| 2 | For SmartStream HCM only , create a shortcut on the desktop for SmartStream Poll on Windows workstations. |
| 3 | In a Windows environment, using the Services utility from the Administrative Tools utility in Control Panel, change the startup type for SmartStream Master Scheduler, Poll, and ARPC to Automatic , and then start them. |

Configuring Master Scheduler

Use this procedure to define a Job Scheduler Master Scheduler:

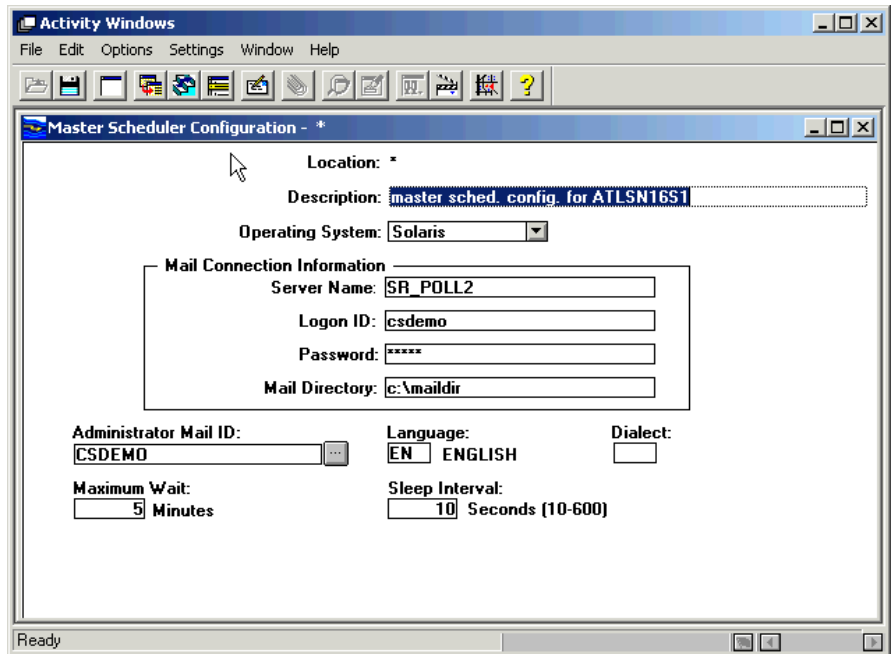
| Step | Action |
|------|--|
| 1 | Click Master Scheduler Configuration in your Activity List. Result: The Master Scheduler Configuration window appears. |
| 2 | For a Windows environment |



| Step | Action |
|------|--------|
|------|--------|

| | |
|---|------------------------|
| 2 | For a UNIX environment |
|---|------------------------|

cont'd



Enter configuration information as needed.

For information about the fields on this window, see the online Help window.

| | |
|---|--|
| 3 | Save the configuration and close the window. |
|---|--|

Configuring Poll

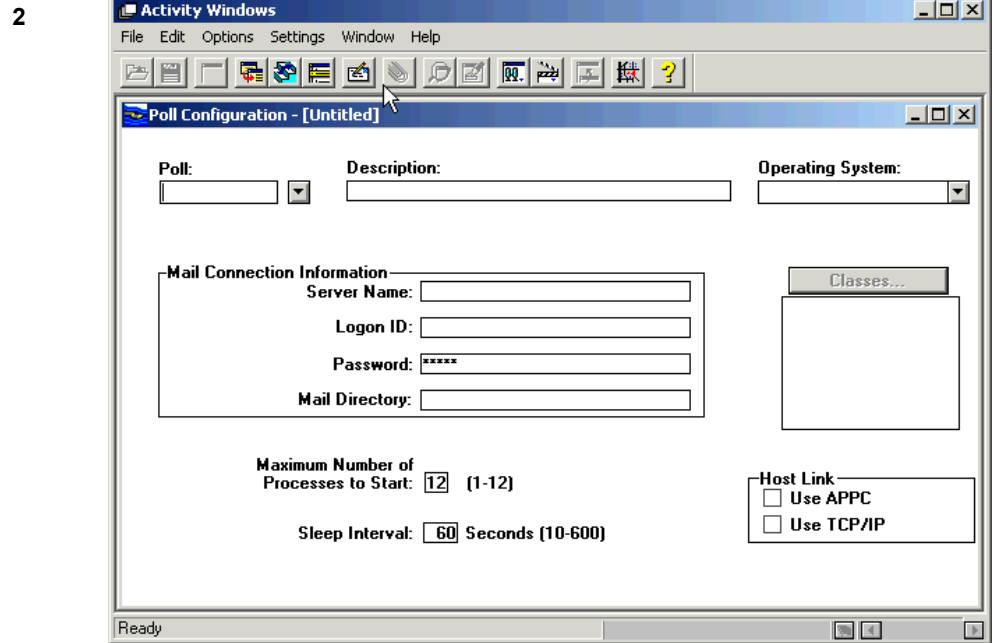
Use this procedure to define an instance of the poll:

| Step | Action |
|------|--------|
|------|--------|

| | |
|---|---|
| 1 | Click Poll Configuration in your Activity List. |
|---|---|

Result: The Poll Configuration window appears.

Step Action

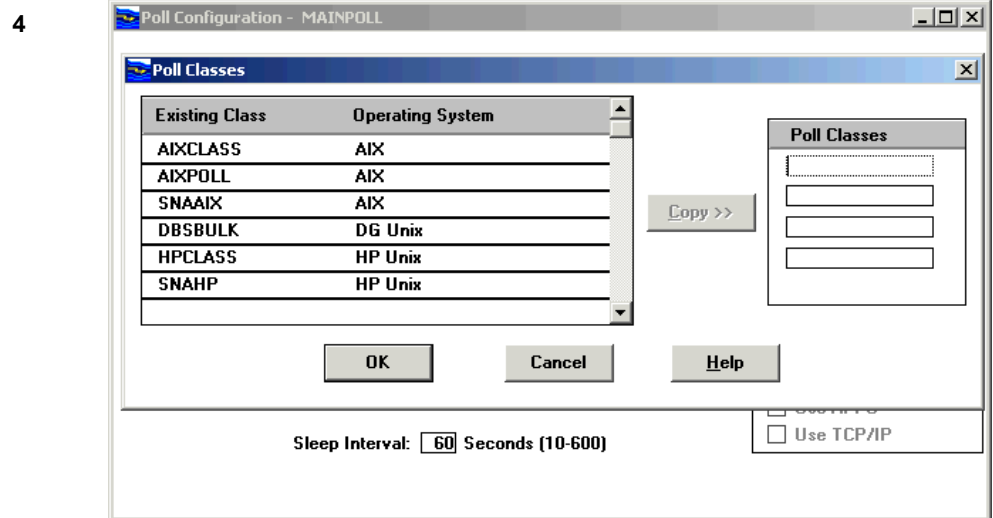


Enter configuration information as needed.

For information about the fields on this window, see the online Help for the window.

3 To define poll classes, click the Classes button.

Result: The Poll Classes dialog box appears.



To create a new class, enter a new class name in one of the fields in the Poll Classes box.

To add an existing class, select a class from the Existing Class list and click Copy.

When you finish entering classes, click OK to close the dialog box.

| Step | Action |
|------|-------------------------|
| 5 | Save the configuration. |

Configuring ARPC

Use this procedure to configure the Asynchronous RPC Master Server.

| Step | Action |
|------|--|
| 1 | Click Asynchronous RPC Configuration in your Activity List. Result: The Asynchronous RPC Configuration window appears. |

2

Enter configuration information as needed.

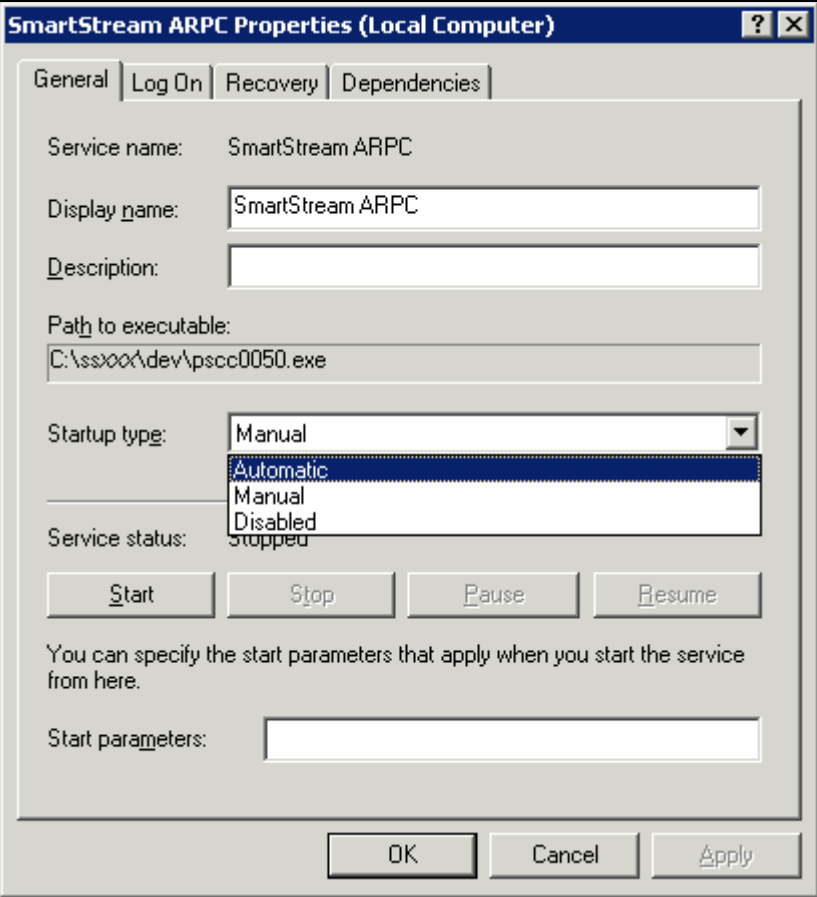
For information about the fields on this window, see the online Help for the window.

| | |
|---|-------------------------|
| 3 | Save the configuration. |
|---|-------------------------|

Example of Updating Services

This procedure shows how you update the ARPC Master Server in a Windows environment:

| Step | Action |
|------|---|
| 1 | Open Control Panel. |
| 2 | Click Administrative Tools, then click Services, and select SmartStream ARPC. Result: The SmartStream ARPC Properties dialog box appears. |

| Step | Action |
|------|---|
| 3 |  <p>The screenshot shows the 'SmartStream ARPC Properties (Local Computer)' dialog box. The 'General' tab is selected. The 'Service name' is 'SmartStream ARPC'. The 'Display name' is 'SmartStream ARPC'. The 'Description' field is empty. The 'Path to executable' is 'C:\ss\dev\pscc0050.exe'. The 'Startup type' dropdown menu is open, showing 'Automatic' selected. The 'Service status' is 'stopped'. There are buttons for 'Start', 'Stop', 'Pause', and 'Resume'. Below these buttons, there is a text box for 'Start parameters'.</p> |
| 4 | Close the SmartStream ARPC utility. |
| 5 | Close the windows that were opened. |

Change the Startup type setting to **Automatic**, click Start under Service status, and click OK.

Performing Post-Installation Tasks

After you successfully install SmartStream, you must perform certain post-installation tasks appropriate to your SmartStream environment.

For information about post-installation tasks, see Chapter 13, *After Completing the Setup Process*, in the SmartStream *Installation Guide*.

Appendix Contents

| | |
|-----|----------------------------|
| A-1 | About the wjamit Utility |
| A-2 | Installation |
| A-3 | Calling Parameters |
| A-4 | Running the wjamit Utility |

About the wjamit Utility

The wjamit utility is a Windows and UNIX utility that you use to perform these activities:

- Create databases
- Load databases
- Initialize tables
- Export and import data during the migration process

Installation

When you ran the File Server Setup program from the SmartStream compact disc or compact disc image, the wjamt utility for Windows was installed in the **ldbms** directory on your file server.

Prerequisite Tasks

- If you use Sybase Adaptive Server Enterprise, ensure that the supported version of PC Client software is installed on your installation workstation.

If you use Microsoft SQL Server, ensure that the supported version Microsoft Database Client software is installed on your installation workstation.

- Ensure that the directory you plan to use for output files (.out, .err, and .rst) was added and that you can write files to this directory.

Calling Parameters

This table shows calling parameters in sequence:

| Seq. | Parameter Name | Description |
|------|-----------------------------|---|
| 1 | Utility name | Always wjamit.exe |
| 2 | .prf run option | Valid values are 1 - Normal run: stop on first - error 2 - Restart the run using the - restart file 3 - Run, but do not stop on error 4 - Syntax check prf file. Example: 1 |
| 3 | .prf file name | Usually database.prf |
| 4 | Section name in a .prf file | Example: INSTALL_WITH_ED_DATA |
| 5 | Output file directory | Example: s:\smrtstrm.rs\dbms\fast\ |
| 6 | File prefix | Defines the prefix for all wjamit output files Example: fast (results in fast.out, fast.err, fast.rst) |
| 7 | Server name | Example: radrs04s6 |
| 8 | Server login | Example: sa |
| 9 | Server login password | Example: password |

Example

This sample command shows the use of the calling parameters:

```
..wjamit.exe 1 database.prf INSTALL_WITH_DATA s:\smrtstrm.rs\dbms\fast\
fast radrs04s6 sa password
```

Syntax Rules

Observe the following list of syntax rules:

- The section name is case sensitive and must exactly match the section name in the .prf file.
- The output file directory must end with a backslash (\).
- You cannot omit any parameters.

Running the wjamit Utility

From the directory that contains the .prf file and .sql files referenced in the .prf file, type `..\` followed by the calling parameters, with no space between the backslash (\) and **wjamit.exe** (the first parameter).

This step assumes that the wjamit utility is stored one level higher in the directory structure than the .prf file.

Output Files

The wjamit utility generates these output files:

| Files with these extensions... | Contain... |
|---------------------------------------|---|
| .out | A historical record of database activity. |
| .err | Only error information. |
| .rst | Restart information if an error occurs. |

Appendix B Installation Worksheets

Appendix Contents

| | |
|------|---|
| B-1 | File Server Installation Worksheet |
| B-4 | Database Server Installation Worksheets |
| B-9 | SmartStream Builder Database Server Installation Worksheet |
| B-10 | SmartStream Client Workstation Installation Worksheet |
| B-12 | SmartStream Mail Gateway Workstation Installation Worksheet |
| B-13 | SmartStream Job Server Installation Worksheet |
| B-15 | SmartStream Connect Installation Worksheet |

File Server Installation Worksheet

Use the following worksheet to help you set up your file server.

Complete this worksheet as you read Chapter 3, Preparing and Installing the File Server.

Installation Type:

- Quick (installation of all products listed in the license file)
- Custom (installation of selected products listed in the license file)

Location of license file: _____

Source directory: _____

Operating system for the SmartStream environment:

Administrator's language (Custom installation only):

English (EN)

French (FR)

Spanish (ES)

Destination directory: _____

Product Components to Install

| Product | Installing this product? | |
|-----------------------------------|--------------------------|----|
| Allocations (ALLOCATE) | Yes | No |
| Asset Management (ASSETS) | Yes | No |
| Background Load (BACKLOAD) | Yes | No |
| Benefits (BENEFITS) | Yes | No |
| Billing (BILLING) | Yes | No |
| Budget (BUDGET) | Yes | No |
| Consolidations (CONSOLID) | Yes | No |
| Euro (EURO) | Yes | No |
| Funds Control (FUNDS) | Yes | No |
| Items (ITEMS) | Yes | No |
| Ledger: Average Balances (LEDGER) | Yes | No |
| Ledger: Commercial (LEDGER) | Yes | No |
| Open Analyzer (OPENAZER) | Yes | No |
| Payables (PAYABLES) | Yes | No |
| Payroll (PAYROLL) | Yes | No |
| Personnel (PERSONEL) | Yes | No |
| Procurement Common (PCOMMON) | Yes | No |
| Projects (PROJECTS) | Yes | No |
| Purchasing (PURCHASE) | Yes | No |
| Receivables (RECEIVBL) | Yes | No |
| Receiving (RECEIVING) | Yes | No |
| Shared Components (COMMON) | Yes | |
| SmartStream (PLATFORM) | Yes | |

| Product | Installing this product? | |
|---------------------------------|---------------------------------|----|
| SmartStream Builder (STRMBLDR) | Yes | No |
| SmartStream Connect (CONNECT) | Yes | No |
| Supplies Management (INVENTORY) | Yes | No |
| Supplies Management Cost (COST) | Yes | No |
| Unit of Measure (UOMM) | Yes | No |

Note: The value in parentheses is written to the dbsinst.ini file on the file server during file server setup.

Database Server Installation Worksheets

Use the following worksheets to help you set up your database server by creating and loading the SmartStream databases.

Complete these worksheets as you read Chapter 6, Installing SmartStream Products on the Database Server.

Creating Databases

SmartStream file server path: _____

SmartStream environment:

- New (environment description): _____
- Existing (environment to install): _____

Database server name: _____

System Administrator ID: _____

Password: _____

Product Databases to Create

| Product | Installing this product? | |
|-------------------------------|--------------------------|----|
| | Yes | No |
| Allocations | Yes | No |
| Asset Management | Yes | No |
| Background Load | Yes | No |
| Billing | Yes | No |
| Budget | Yes | No |
| Consolidations | Yes | No |
| Euro | Yes | No |
| Funds Control | Yes | No |
| Items | Yes | No |
| Ledger | Yes | No |
| Payables | Yes | No |
| Payroll | Yes | No |
| Personnel (includes Benefits) | Yes | No |
| Procurement Common | Yes | No |
| Projects | Yes | No |
| Purchasing | Yes | No |
| Receivables | Yes | No |

| Product | Installing this product? | |
|--------------------------|---------------------------------|----|
| Receiving | Yes | No |
| Shared Components | Yes | |
| SmartStream | Yes | |
| SmartStream Builder | Yes | No |
| SmartStream Connect | Yes | No |
| Supplies Management | Yes | No |
| Supplies Management Cost | Yes | No |
| Unit of Measure | Yes | No |

Complete the following table only if you plan to change the default data device or log device, or both, for a product component you are installing on the database server:

| Product | Component | Data Device | Log Device |
|------------------|------------------|--------------------|-------------------|
| Allocations | allc | | |
| Asset Management | fast | | |
| | fwrk | | |
| Background Load | mabl | | |
| Billing | bill | | |
| Budget | bdgt | | |
| Consolidations | cons | | |
| Euro | euro | | |
| | eurr | | |
| Funds Control | fund | | |
| Items | pmam | | |
| | pplm | | |
| Ledger | glep | | |
| | jepc | | |
| Payables | prqt | | |
| | pymt | | |
| Payroll | hrpa | | |
| | hrpy | | |

| Product | Component | Data Device | Log Device |
|----------------------------------|------------------|--------------------|-------------------|
| Personnel (includes Benefits) | hapm | | |
| | hrac | | |
| | hrpn | | |
| Procurement Common | cntl | | |
| | dclm | | |
| | hist | | |
| | mfgi | | |
| | otpm | | |
| | plmm | | |
| | rsmm | | |
| | udef | | |
| Projects | pjal | | |
| | pjcm | | |
| | proj | | |
| | pwrk | | |
| Purchasing | pcde | | |
| | poan | | |
| | puen | | |
| | reqm | | |
| Receivables | cred | | |
| | rrcv | | |
| Receiving | ropm | | |
| Shared Components | bank | | |
| | cand | | |
| | cmre | | |
| | csccommon | | |
| | dbis | | |
| | entp | | |
| | eurolite | | |
| | pclh | | |
| | purg | | |
| | udak | | |
| | vend | | |
| | vmst | | |
| | vpur | | |

| Product | Component | Data Device | Log Device |
|--------------------------|------------------|--------------------|-------------------|
| SmartStream | apra | | |
| | arpc | | |
| | avnm | | |
| | cfrm | | |
| | cmat | | |
| | ctlg | | |
| | ctlgddl | | |
| | ctlgmast | | |
| | ctlgsvr | | |
| | demo | | |
| | lang | | |
| | mesm | | |
| | osst | | |
| | osxp | | |
| | piqdlite | | |
| | pscb | | |
| | supc | | |
| | supt | | |
| | wact | | |
| | wijt | | |
| wijtact | | | |
| wsa1 | | | |
| wsa2 | | | |
| SmartStream Builder | psb1 | | |
| | sbctlg | | |
| | sbwact | | |
| SmartStream Connect | piqd | | |
| Supplies Management | iplm | | |
| | rcth | | |
| | strm | | |
| Supplies Management Cost | cost | | |
| Unit of Measure | uomm | | |

Loading Databases

System Administrator password: _____

Product Databases to Load

| Product | Installing this product? | |
|-------------------------------|--------------------------|----|
| Allocations | Yes | No |
| Asset Management | Yes | No |
| Billing | Yes | No |
| Budget | Yes | No |
| Consolidations | Yes | No |
| Euro | Yes | No |
| Funds Control | Yes | No |
| Ledger | Yes | No |
| Payables | Yes | No |
| Payroll | Yes | No |
| Personnel (includes Benefits) | Yes | No |
| Projects | Yes | No |
| Purchasing | Yes | No |
| Receivables | Yes | No |
| Receiving | Yes | No |
| Shared Components | Yes | |
| SmartStream | Yes | |
| SmartStream Builder | Yes | No |
| SmartStream Connect | Yes | No |
| Supplies Management | Yes | No |
| Supplies Management Cost | Yes | No |

Sample Data

Load sample data? Yes No

Do not load sample data if you tailor the accounting key delivered with SmartStream.

SmartStream Builder Database Server Installation Worksheet

Use the following worksheet to help you install SmartStream Builder on the database server.

Complete this worksheet as you read Chapter 6, Installing SmartStream Products on the Database Server.

SmartStream file server path: _____

SmartStream environment:

SmartStream environment:

▪ New (environment description): _____

▪ Existing (environment to install): _____

Database server name: _____

System Administrator ID: _____

Password: _____

Note: SmartStream Builder does not create new databases. It loads data into previously added product databases.

SmartStream Client Workstation Installation Worksheet

Make a copy of this worksheet for each SmartStream profile file that you plan to create.

Complete the worksheet as you read Chapter 8, Installing SmartStream Products on the Client Workstation.

Note: Where applicable, the default is shown in parentheses.

Profile description: _____

Profile file name: _____

Target directory (c:\sstrm.xx): _____

Products

- | | |
|------------------------------------|---------------------|
| Allocations | Payables |
| Asset Management | Payroll |
| Benefits | Personnel |
| Billing | Platform Tools |
| Budget Administrator and Workbench | Projects |
| Budget Workbench Only | Projects Allocation |
| Common Components | Projects Common |
| Consolidations | Purchasing |
| Euro Currency | Receivables |
| Funds Control | SmartStream |
| Ledger | Supplies Management |
| Open Analyzer | |

SmartStream Builder Installation for Client Workstation

Use the following worksheet to help you install SmartStream Builder on a client workstation.

Complete the worksheet as you read Chapter 8, Installing SmartStream Products on the Client Workstation.

Note: Where applicable, the default is shown in parentheses.

Destination directory (c:\ssbuilDr): _____

Location of SmartStream on the client workstation:

SmartStream Mail Gateway Workstation Installation Worksheet

Use the following worksheet to help you install the SmartStream Mail Gateway.

Complete the worksheet as you read Chapter 9, Installing the SmartStream Mail Gateway.

Note: Where applicable, the default is shown in parentheses.

SmartStream file server path: _____

SmartStream environment: _____

Destination directory (c:\mailgate):

Mail directory (c:\maildir):

Mail host information:

- Server name: _____
- Port number: _____

Mail sender information:

- Sender name: _____
- Email address: _____

Mail administrator information:

- Name: _____
- Email address: _____

Mail check interval (5 minutes): _____

Path and name of the Mail Gateway log file (c:\mailgate\mailgate.log):

SmartStream Job Server Installation Worksheet

Use the worksheet that is appropriate for your environment to help you install Job Server.

Complete the worksheet as you read Chapter 10, Installing Job Server.

UNIX Environment

The following worksheet is appropriate for the UNIX environment.

Note: Where applicable, the default is shown in parentheses.

Environment to install: _____

UNIX host name: _____

Logon user ID: _____

Password: _____

Destination directory: _____

Database server name: _____

System administrator:

▪ ID: _____

▪ Password: _____

Poll name: _____

Path to Job Server (*): _____

ARPC server name: _____

Windows Server Environment

The following worksheet is appropriate for the Windows Server environment.

Note: Where applicable, the default is shown in parentheses.

Environment to install: _____

Destination directory (c:\sstrmxx\batch):

Database server name: _____

System administrator:

▪ ID: _____

▪ Password: _____

Poll name: _____

Path to Job Server (*): _____

ARPC server name: _____

For multiple copies of Job Server on the same workstation only

Suffix to make service names unique for each copy of Job Server:

SmartStream Connect Installation Worksheet

Use the worksheet that is appropriate for your environment to help you install SmartStream Connect.

Complete the worksheet as you read Chapter 11, Installing SmartStream Connect.

SmartStream environment: _____

Job Server location where you are installing Connect:

Appendix C Minimum Sizing Requirements

Appendix Contents

| | |
|-----|-----------------------------------|
| C-1 | About Minimum Sizing Requirements |
| C-2 | Database Server |
| C-5 | Client Workstations |

About Minimum Sizing Requirements

Before you begin the installation process, ensure that your environment meets the minimum sizing requirements for SmartStream.

This appendix shows the minimum sizing requirements for the SmartStream

- Database server
- Client workstations.

Database Server

This table shows the minimum sizing requirements for each SmartStream component that creates and sizes a database:

| SmartStream Product | SmartStream Component | Data (MB) | Log (MB) |
|----------------------------|------------------------------|------------------|-----------------|
| SmartStream | Catalog | 60 | 40 |
| | Workflow and Security | 160 | 120 |
| | Structures | 80 | 80 |
| | Structures Export | 60 | 40 |
| | Job Scheduler | 80 | 80 |
| | SmartStream Connect | 40 | 40 |
| | ARPC | 40 | 40 |
| | Product Support - Common | 60 | 40 |
| | Common Formula | 40 | 40 |
| | Sample Registration | 40 | 40 |
| | Demonstration | 40 | 40 |
| Shared Components | Archive/Purge | 40 | 40 |
| | Archive Purge Candidates | 40 | 40 |
| | Bank | 100 | 100 |
| | EURO Basic | 60 | 40 |
| | Rate Entity | 60 | 60 |
| | Enterprise Policy | 80 | 60 |
| | Periodic Calendar | 40 | 40 |
| | Vendor Payables | 40 | 40 |
| | Vendor Master | 80 | 40 |
| | Vendor Purchasing | 40 | 40 |
| | D & B Information Service | 40 | 40 |
| Ledger | General Ledger | 300 | 200 |
| | Ledger Journals | 40 | 40 |
| Asset Management | Assets | 280 | 200 |
| | Asset Work | 60 | 60 |
| Consolidations | Consolidations | 80 | 80 |
| Allocations | Allocations | 100 | 100 |
| Budget | Budget | 100 | 100 |

| SmartStream Product | SmartStream Component | Data (MB) | Log (MB) |
|----------------------------|------------------------------|------------------|-----------------|
| Payables | Payment Request | 160 | 100 |
| | Payments | 60 | 60 |
| Receivables | Accounts Receivables | 240 | 120 |
| | Credit Management | 40 | 40 |
| Unit of Measure | Unit of Measure | 40 | 40 |
| Projects | Project Common | 40 | 40 |
| | Projects | 120 | 80 |
| | Project Allocations | 60 | 60 |
| | Project Work | 40 | 40 |
| Procurement Common | Mfg Common Control | 40 | 40 |
| | Day Calendar | 40 | 40 |
| | History Options | 40 | 40 |
| | Order Type Master | 40 | 40 |
| | Plant Tables | 40 | 40 |
| | Reason Master | 40 | 40 |
| | UDAK Definition | 40 | 40 |
| Items | Part Master | 40 | 40 |
| | Part Plant | 40 | 40 |
| Receiving | Routing Operation | 40 | 40 |
| Background Load | Mfg Bulk Load | 40 | 40 |
| Purchasing | Purchase Order | 80 | 60 |
| | Purchasing - Common | 40 | 40 |
| | Requisitions | 80 | 60 |
| | Purchase Order Annals | 40 | 40 |
| Cost Management | Cost Management | 100 | 60 |
| Supplies Management | Inventory | 40 | 40 |
| | Transaction History | 40 | 40 |
| | Stockroom | 40 | 40 |
| Personnel | Personnel and Benefits | 600 | 300 |
| | Access | 80 | 40 |
| | SmartStream Map | 40 | 40 |

| SmartStream Product | SmartStream Component | Data (MB) | Log (MB) |
|-------------------------------|------------------------------|------------------|-----------------|
| Payroll | Payroll | 140 | 100 |
| | Payroll Archive | 40 | 40 |
| Funds Control | Funds Control | 200 | 200 |
| Billing | Billing | 100 | 100 |
| Total for All Products | | 5180 | 4140 |

Client Workstations

This table shows the minimum disk sizing requirements by product for SmartStream client workstations:

| Size (MB) | Product |
|------------------|-------------------------------------|
| 5.8 | Allocations |
| 20.8 | Asset Management |
| 5.7 | Benefits |
| 10.0 | Billing |
| 13.2 | Budget Administration and Workbench |
| 32.3 | Common Components |
| 5.0 | Consolidations |
| 6.2 | Euro Currency |
| 9.1 | Funds Control |
| 15.8 | Ledger |
| 0.1 | Open Analyzer |
| 14.2 | Payables |
| 19.7 | Payroll |
| 27.1 | Personnel |
| 2.0 | Platform Tools |
| 8.9 | Projects |
| 1.9 | Projects Allocations |
| 2.3 | Projects Common |
| 20.8 | Purchasing |
| 40.4 | Receivables |
| 52.3 | SmartStream |
| 4.6 | Supplies Management |

