

# 170 MarkView<sup>®</sup> Advisor<sup>™</sup> Worksheet

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Use this worksheet to gather the information required to install or upgrade 170 MarkView Advisor. Use the worksheet in conjunction with the *170 MarkView Operation and Administration* to install and configure 170 MarkView Advisor. Do not start the installation process until you complete the worksheet, which will ensure that you have all of the information you need.

The installation process installs 170 MarkView Advisor components on multiple machines. The planning section in *170 MarkView Advisor Operation and Administration* provides information about where to install 170 MarkView Advisor and Advisor components.

# 1 Pre-installation and upgrade task information

The database administrator needs the following information to complete the tasks required before installing or upgrading Advisor.

## 1.1 System information

Item	Your Information	Description
<b>Oracle Database Management SYS account</b>		
Username		The <i>username</i> associated with the Oracle database management (SYS) account needed to create the Advisor schema and manage tablespaces.
Password		The <i>password</i> associated with the RDBMS SYS account.
<b>Installation/Upgrade application</b>		
Installation/upgrade application name	<i>install-image-oracle-x.x.x.zip (where x.x.x is the version number)</i>	Names of the Advisor installation/upgrade files from 170 Systems.
Location		The location from which to download the installation application from 170 Systems. Contact 170 Systems Technical Support.
Installation Directory		The directory into which you will download and decompress the installation/upgrade applications. If downloading files to separate machines, specify both machine names and paths.
<b>Application Server Host</b>		
<i>Host name</i>		The <i>host name</i> of the Application Server (for example, OAS) to use with this Advisor installation.
<i>Administrator user name</i>		The <i>name</i> of the administrator user who installed the Application Server. For example, oraias01.
<i>Administrator password</i>		The <i>password</i> of the Application Server administrator.
<b>MarkView Target Registry Service URL</b>		
Target Registry Service URL		The URL where the 170 MarkView for Accounts Payable installation saved the MarkView Target Registry Service. The format is: <code>http://&lt;j2ee_appserver_host.company.com&gt;:7777/mvastrs/markview</code> For example, <code>http://oas_host.company.com:7777/mvastrs/markview</code>

## 1.2 Information for script prompts

The Database Administrator runs a series of scripts to create database tablespaces and to assign privileges and grants to users who are installing Advisor. The scripts provided prompt the administrator for the information in the following table.

### 1.2.1 Creating tablespaces

The following prompts appear if you run the script to create database tablespaces for Advisor.

Item	Your information	Description
<b>create_tablespace.sql</b>		
<i>Name for the data tablespace</i>		Create a name to use for the data tablespace. For example, Advisor_Data.
<i>Initial size (MB)</i>		Enter the initial size to allot for the Advisor data tablespace.
<i>Maximum size (MB)</i>		Enter a maximum size for the Advisor tablespace, or, leave the prompt empty.
<i>Location of stored file</i>		Enter the location where the DBF file will reside on the database server.
<b>create_tablespace.sql</b>		
<i>Name for the index tablespace</i>		Create a name to use for the data tablespace. For example, Advisor_Index.
<i>Initial size (MB)</i>		Enter the initial size to allot for the Advisor index tablespace.
<i>Maximum size (MB)</i>		Enter a maximum size for the Advisor tablespace, or, leave the prompt empty.
<i>Location of stored file</i>		Enter the location where the DBF file will reside on the database server.

### 1.2.2 Creating the Advisor user

The following prompts appear when you run the script that creates the Advisor user.

Item	Your information	Description
<b>create_account.sql</b>		
<i>Username</i>		Create a name for the Advisor user. For example, advisor.
<i>Password</i>		Create a password for the Advisor user.
<i>DB data tablespace name</i>		Enter the name of the tablespace for Advisor database data, for example, Advisor_Data.
<i>DB index tablespace name</i>		Enter the name of the tablespace for the Advisor database index, for example, Advisor_Index.
<i>Name of the temp database directory</i>		Installing the database software creates a temp directory.

### 1.2.3 Granting MarkView privileges

The following prompts appear when you run the script to grant the MarkView user the privileges needed for Advisor setup.

Item	Your information	Description
<b>markview_grant_privileges.sql</b>		
<i>MarkView Schema Username</i>		Enter the <i>name</i> of the MarkView schema user.

### 1.2.4 Assigning grants and privileges to the Advisor schema

The following prompts appear when you run the script to assign grants and privileges to the Advisor schema.

Item	Your information	Description
<b>advisor_grant_privileges.sql</b>		
<i>Advisor Schema Username</i>		Enter the <i>name</i> of the Advisor schema user.

## 2 Information needed by the installation application

You need the following information to access the installation and upgrade application and to respond to prompts during the process. Except for passwords, most of the information is stored in the Target Registry Service.

To install or upgrade Advisor, log in to the Application Server as the Operating System Administrator, or as a user with read/write privileges.

Item	Your information	Description
<b>Installation application</b>		
Advisor installation/upgrade application	install.sh (UNIX) Install.bat (Windows)	The name of the Advisor installation application file from 170 Systems. (Depends on the operating system.)
Location	<b>/bin</b>	The directory where you downloaded and decompressed the installation application.
Install/upgrade application prompts		
<i>Advisor v6.4 (x)</i> <i>Install Advisor</i>		Specify whether you are installing or upgrading Advisor. If you are running an upgrade, the term <i>install</i> indicates that the latest version of the product is being installed.
<b>Which type of application server will 170 MarkView use?</b>		
Choose Application Server	OAS	
<b>Select the directory in which to install Advisor</b>		
Installation Directory		Specify the directory in which to install Advisor. For the best results, use the MarkView installation directory.
<b>MarkView Target Registry Service URL</b>		
TRS Status		Verify that the TRS is running.

## 2.1 MarkView schema connection information

Item	Your information	Description
Schema Username		The username for the 170 MarkView schema database. For example: markview.
Schema Password		The password for the 170 MarkView schema user.
Host		The fully qualified host name for the Oracle DBMS server where the 170 MarkView schema resides. For example: dbserver.170systems.com
Port		The port number for the TNS Listener for the Oracle DBMS.
SID		The Oracle System Identifier (SID) used in the connection string to reference the database instance. For example: testDB.
Tablespace		The name of the tablespace where the MarkView database objects were created for the 170 MarkView database schema user.
Indexspace		The name of the indexspace where the MarkView database indexes are created for the 170 MarkView.
Logging Directory		The database logging directory defined for the MarkView schema database by the database administrator.

## 2.2 Advisor schema connection information

Item	Your information	Description
Advisor Schema Username		The username for the Advisor database account schema. For example: advisor.
Schema Password		The password for the Advisor database account username.
Tablespace		The name of the tablespace where Advisor database objects are created for the Advisor database schema user.
Indexspace		The name of the indexspace where the MarkView database indexes are created for Advisor.

### 2.3 Application Server information for MarkView

Item	Your information	Description
OAS Host		The fully qualified name for the 170 MarkView Application Server. For example: oas10g.170systems.com
HTTP Port		The HTTP port defined for the Oracle HTTP Server. The default port is 7777. If not using the default port, the port must be configured in OAS. For example: http://<servername>.<mycompany.com>:7777/markview/mv_admin_home.home
OPMN Request port		The request port for the OAS instance. You can find this port in opmn.xml. The default Request port is 6003.
<b>Instance information created during OAS installation</b>		
OAS Admin Instance		
OAS Admin Group		
OAS Admin User		The username for the OAS Administrator account.
OAS Admin Password		The password for the OAS Administrator account.
<b>MarkView instance information</b>		
MarkView Instance	Markview	
MarkView Group	Markview_group	
Clustered Environment	False	Specify whether your OAS is configured with clustered groups. If so, specify the cluster group name.
Cluster Group Name	True	

### 2.4 Application Server information for Advisor

Item	Your information	Description
Advisor Instance		
Advisor Group		

### 3 Information for Cold Sync

Item	Your Information	Description
Org Short names		List of organization short names to include in Advisor. (Use a separate sheet as needed.)
exportDir		the name of the directory in which to save the MarkView export data
<b>From 1.1 System information</b>		
markviewDBUser		Username recorded under Oracle Database Management SYS account
markviewDBPassword		Password associated with the username
<b>From 2.1 MarkView schema information:</b>		
dbHost		Host recorded in 2.1.
dbPort		Port recorded in 2.1.
dbSid		SID recorded in 2.1.
<b>From 2.3 OAS information for MarkView</b>		
appsDBUser		OAS Admin User recorded under Instance information created during OAS installation
appsDBPassword		Password associated with the username.

### 4 Information for Advisor configuration

Item	Your Information	Description
<b>Alert Configuration</b>		
Mail from		An address that indicates the email is from Advisor, for example, AdvisorSystems@mydomain.com.
Mail subject		Text to appear in the email subject line for alert notification email, for example, "Advisor Alerts".
Mail SMTP authorization		The default user name for SMTP.
Mail SMTP host		The SMTP host name or IP address.
Mail SMTP port		The port number used by the Mail SMTP server.
SMTP authentication>Mail user		The name of the SMTP user to allow Advisor email notifications to use the SMTP mail system.
SMTP authentication>Mail password		The password associated with the SMTP user.





