IBM® WebSphere™ Commerce
Pro and Business Edition for iSeries

IBM

Additional Software Guide

Version 54

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> **Note:**
>
> Before using this information and the product it supports, be sure to read the general information under "Notices" on page 31.

First Edition (March 2002)

This edition applies to version 5.4 of IBM WebSphere Commerce for IBM @server iSeries 400® and to all subsequent releases and modifications until otherwise indicated in new editions. Make sure you are using the correct edition for the level of the product.

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Contents

Part 1. Install optional WebSphere Commerce components

WebSphere Commerce includes several optional software packages that can be used in conjunction with WebSphere Commerce. Instructions for installing and configuring these packages are in the following chapters:

- Chapter 1, "Using Lightweight Directory Access Protocol with WebSphere Commerce" on page 3
- Chapter 2, "Installing WebSphere Commerce 5.4 Recommendation Engine powered by LikeMinds" on page 7
- Chapter 3, "IBM WebSphere Commerce Analyzer 5.2" on page 9
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These products can be installed before or after you create a WebSphere Commerce instance.

Chapter 1. Using Lightweight Directory Access Protocol with WebSphere Commerce

WebSphere Commerce supports either IBM LDAP Directory Services (5722 SS1, option 32), or IBM SecureWay® Directory as its Lightweight Directory Access Protocol (LDAP) directory server. Note that after you install the LDAP directory server you want to use, you need to complete the appropriate fields in the Member Subsystem panel of the Configuration Manager.

IBM SecureWay Directory Server 3.2.1

IBM SecureWay Directory Server provides a common directory for customers to address the proliferation of application-specific directories, a major driver of high costs. IBM SecureWay Directory is an LDAP cross-platform, highly scalable, robust directory server for security and e-business solutions.

For more information on IBM SecureWay Directory Server, consult the following Web site:

`http://www.ibm.com/software/network/directory/`

Install and configure the IBM SecureWay Directory Server 3.2.1 as described in the installation and configuration information provided with the directory server. Install the directory server on a machine that is behind the same fire wall as your WebSphere Commerce machine.

To configure IBM SecureWay Directory Server 3.2.1 to work with WebSphere Commerce, you must do the following:

1. You must add a suffix to your IBM SecureWay Directory Server 3.2.1. To add a suffix for a SecureWay Directory Server running on a Windows machine, you must do the following:

   a. In the **Services** window, start the **IBM SecureWay Directory V. 3.2** service.

   b. Enter the following URL in a Web browser:

      `http://localhost/ldap`

   c. **Logon** to your IBM SecureWay Directory Server using the user name and password that was set up when you installed IBM SecureWay Directory Server 3.2.1 (for example, user name `cn=root`, password `root`). The **Introduction** window opens.

   d. Select **Settings > Suffixes**.

   e. In the **Suffix DN** field specify `o=root organization`.

   f. Click the **Update** button.

   g. Select **Introduction** in the left-hand panel, and click **Restart**.

   To add a suffix for a SecureWay Directory Server running on an iSeries machine, you must do the following:

   a. Launch AS/400 Operations Navigator from a Windows workstation connected to the network on which your directory server resides.

   b. Connect to the iSeries machine which has Directory Services installed.

   c. Expand the machine name under **My Connections**.

   d. Expand **Network**.

e. Expand **Servers**.

f. Click **TCP/IP**.

g. Mark **Directory** in the right panel. Make sure the Directory Service is started.

h. Right-click the directory service, and choose **Properties**.

i. Click **Database/Suffixes**

j. In the New suffix field specify `o=root organization`, then click **Add**.

k. Click **OK**, and restart the server.

2. Create bootstrap entries. To create the bootstrap entries, do the following:

a. Select **Start > Programs > IBM Secureway Directory > Directory Management Tool**.

b. On the Directory Management Tool window, expand the **Server > Rebind**.

c. On the **Rebind** window select the **Authenticated** radio button

d. Enter the user DN, and password in the appropriate fields. Click **OK**.

> **Note:** You may encounter a "There is no data for o=root organization." error. This can be safely ignored. Click **OK** to proceed.

e. Select `ldap://localhost:389`, and click the **Add** button.

- Select **Organization** in the **Entry Type** field.
- Enter `o=root organization` in the **Entry RDN** field.
- Click **OK** then **Add** to add the changes.

f. Select `o=root organization`, and click the **Add** button.

- Select **Organization** in the **Entry Type** field.
- Enter `o=root organization` in the **ParentDN** field.
- Enter `o=default organization` in the **Entry RDN** field.
- Click **OK** then **Add** to add the changes.

g. Select **Directory Tree > Browse Tree** to view the changes.

> **Note:** You may need to select **Directory Tree > Refresh Tree**, to see the updated changes.

3. Enable LDAP in the WebSphere Commerce Configuration Manager. To enable LDAP in the WebSphere Commerce Configuration Manager, do the following:

a. In the **Services** window, start the **IBM WC Configuration Manager Server** service.

b. Select **Start > Programs > IBM WebSphere Commerce > Configuration**. Enter your Configuration manager user ID, and password.

c. Expand your host name.

d. Expand **Instance List > *instance_name* > Instance Properties**.

e. Select **Member Subsystem** and do the following:

1) In the **Authentication Mode** field, select **LDAP**.

2) In the **Host** field, enter the *host_name* of your LDAP server machine.

3) Enter your administrator's distinuished name in the **Administrator Distinguished Name** field. This distinguished name must match, the name used on your LDAP server (for example, `cn=root`).

4) Enter the administration password in the **Administrator Password** field (for example, `root`). You must confirm the password in the **Confirm Password** field.

5) Click **Apply**.

6) The **Successfully configured member subsystem for WebSphere Commerce** window displays. Click **OK** to continue.

   f. Exit the Configuration Manager.

4. You must now enable user migration. To enable user migration in WebSphere Commerce, you must do the following:

   a. In the **Services** window, stop the **IBM WS AdminServer 4.0** service.

   b. Open the following file in a text editor:

```
/QIBM/UserData/WebCommerce/instances/instance_name/xml/
instance_name.xml
```

   c. Ensure that the MigrateUsersFromWCSdb entry is set to "ON". This line should appear as follows:

```
MigrateUsersFromWCSdb="ON"
```

   d. Save the file.

   e. In the **Services** window, start the **IBM WS AdminServer 4.0** service.

The next time you log into any WebSphere Commerce administration page (For example, store services, or administration console) your user's profile is migrated to the LDAP server.

Netscape Directory Server

> **Restriction**
>
> Netscape Directory Server is only supported on Windows NT. It is not supported on Windows 2000.

Refer to your Netscape documentation for instructions on enabling and configuring Netscape Directory Server.

Chapter 2. Installing WebSphere Commerce 5.4 Recommendation Engine powered by LikeMinds

LikeMinds Personalization Server uses collaborative filtering technology to provide personalization solutions. It builds user profiles using both users' explicit ratings (explicit profiling) as well as implicit user behavior such as:

- Product purchases
- Items added or removed from a shopping cart
- Navigation history

LikeMinds Personalization Server collaborative filtering technology complements the existing WebSphere Commerce rule-based personalization offering. It consists of a client component, a server component, and a database. For more information on Macromedia LikeMinds, see the following Web site:

`http://www.macromedia.com/software/likeminds/`

WebSphere Commerce installs the client component of the LikeMinds Personalization Server on the WebSphere Commerce machine, by default.

To install and configure the server component of the LikeMinds Personalization Server, see the `readme.txt` file and the Installation Guide. The `readme.txt` file is located in the root directory, and the Installation Guide is located in the `/likeminds/docs` directory of the WebSphere Commerce 5.4 Recommendation Engine powered by LikeMinds CD.

Note: The LikeMinds Personalization Server only supports Windows NT®, AIX®, or the Solaris operating environment.

To use the server component of the LikeMinds Personalization Server, see the Customization Guide and the API Guide. These documents are located in the `/likeminds/docs` directory of the WebSphere Commerce 5.4 Recommendation Engine powered by LikeMinds CD.

Chapter 3. IBM WebSphere Commerce Analyzer 5.2

WebSphere Commerce Analyzer is an optionally installable feature of WebSphere Commerce. WebSphere Commerce Analyzer generates predefined business reports about online stores that are created using WebSphere Commerce. The business reports provide information about the effectiveness of marketing promotions as well as information about product sales. The Marketing Manager can access the business reports from the WebSphere Commerce Accelerator.

During installation and configuration, WebSphere Commerce Analyzer creates a database-based data mart and control database on the WebSphere Commerce Analyzer server. These databases are used to store information needed to generate the business reports. The WebSphere Commerce Analyzer installation program also installs the Brio Broadcast Server reporting tool, which WebSphere Commerce Analyzer uses to generate the business reports.

WebSphere Commerce Analyzer and the Brio Broadcast Server reporting tool are provided on separate CDs with WebSphere Commerce.

Installation prerequisites

WebSphere Commerce Analyzer runs on Windows NT and Windows® 2000 and requires access to certain WebSphere Commerce and Web server directories. If WebSphere Commerce or the Web server are running on machines separate from the machine running WebSphere Commerce Analyzer, these directories must be accessible to your WebSphere Commerce Analyzer machine as shared directories.

Before installing and configuring WebSphere Commerce Analyzer, ensure such access is in place.

For more information on the directories WebSphere Commerce Analyzer accesses, refer to "Sharing directories between WebSphere Commerce Analyzer and WebSphere Commerce" on page 10.

Brio Broadcast Server

WebSphere Commerce Analyzer installs a subset of Brio Broadcast Server from Brio Technology. WebSphere Commerce Analyzer uses Brio Broadcast Server in a limited way to generate the business reports.

Installing WebSphere Commerce Analyzer and Brio Broadcast Server

To install and configure WebSphere Commerce Analyzer, refer to the *WebSphere Commerce Analyzer Installation and Configuration Guide* (`install.pdf`). It is located in the `\`*locale*`\books` directory on the IBM WebSphere Commerce Analyzer 5.4 CD (where *locale* is the locale code for the language environment your machine uses. For example, the locale for United States English is `en_US`).

Note: After you install WebSphere Commerce Analyzer, pay special attention to protecting the business reports provided by WebSphere Commerce Analyzer. This includes the content and structure of the IBM HTTP Server configuration file . General considerations on protecting these reports and

sample configuration directives are included in the *WebSphere Commerce Analyzer Installation and Configuration Guide.*

Sharing directories between WebSphere Commerce Analyzer and WebSphere Commerce

During configuration of WebSphere Commerce Analyzer, you are required to specify the locations of directories that are shared between WebSphere Commerce Analyzer and WebSphere Commerce. These shared directories are needed so that WebSphere Commerce Analyzer can obtain information about the store, and so that WebSphere Commerce can make business reports available through the WebSphere Commerce Accelerator.

The shared directories are:
- WebSphere Commerce installation directory (`/QIBM/UserData/webasadv4`*was_inst*`/installedApps/ WC_Enterprise_App_`*instance_name*`.ear` by default).
- WebSphere Commerce HTML document root directory. The default document root is `/QIBM/UserData/WebCommerce/instances/`*instance_name*.
- WebSphere Commerce HTML relative report path (`WCA/reports` by default).

WebSphere Commerce installation directory

This is the directory on the WebSphere Commerce database server where WebSphere Commerce is made accessable to WebSphere Application Server. By default, it is installed in `/QIBM/Userdata/WebASAdv4`*was_admin_instance*`/installedApps/ WC_Enterprise_App_`*instance_name*`.ear`.

WebSphere Commerce Analyzer requires read access to this directory.

Before you install WebSphere Commerce Analyzer, be sure that this directory is available from the WebSphere Commerce server. Before you configure WebSphere Commerce Analyzer, connect to the directory.

During WebSphere Commerce Analyzer configuration, provide the drive letter and, if necessary, the path by which the WebSphere Commerce Analyzer server connects to the directory. For example, if the directory `/QIBM/UserData/WebASAdv4`*was_admin_instance*`/installedApps/ WC_Enterprise_App_`*instance_name*`.ear` is shared by WebSphere Commerce, and WebSphere Commerce Analyzer connects to the directory as `S:\`, provide `S:\` as the **WebSphere Commerce Product Install Directory** during WebSphere Commerce Analyzer configuration.

However, if the directory `/QIBM/UserData/WebASAdv4`*was_admin_instance*`/installedApps` is shared by WebSphere Commerce and WebSphere Commerce Analyzer connects to the directory as `R:\`, you must provide `R:\WC_Enterprise_App_`*instance_name*`.ear` as the **WebSphere Commerce Product Install Directory** during WebSphere Commerce Analyzer configuration.

WebSphere Commerce HTML document root directory

WebSphere Commerce Analyzer displays business reports to Marketing Managers. WebSphere Commerce Analyzer server creates and deletes files and subdirectories

in this directory. The default document root is
/QIBM/UserData/WebCommerce/instances/*instance_name*

WebSphere Commerce Analyzer requires permission to read the directory, and to
create and delete files and subdirectories.

Before you install WebSphere Commerce Analyzer, be sure that this directory is
available. Before you configure WebSphere Commerce Analyzer, connect to the
directory.

During WebSphere Commerce Analyzer configuration, provide the drive letter and,
if necessary, the path by which the WebSphere Commerce Analyzer server connects
to the directory. For example, if the shared HTML document root is
/QIBM/UserData/WebCommerce/instances/*instance_name*, the WebSphere Commerce
shared directory is also /QIBM/UserData/WebCommerce/instances/*instance_name*
and the WebSphere Commerce Analyzer server connects to the directory as T:\,
then provide T:\ as the **WebSphere Commerce Analyzer's HTML Document Root**
during configuration.

WebSphere Commerce HTML relative report path

This is the subdirectory of the WebSphere Commerce HTML document root in
which the business reports are stored. By default, this subdirectory is WCA/reports.
This path is specified during WebSphere Commerce configuration. WebSphere
Commerce Analyzer concatenates the path to the end of the WebSphere Commerce
HTML Document Root Directory and adds the store's locale and a store identifier
to yield the complete path to WebSphere Commerce Analyzer's report file on the
WebSphere Commerce server. For example, if your WebSphere Commerce HTML
Document Root Directory is
/QIBM/UserData/WebCommerce/instances/*instance_name* and you accept the default
WebSphere Commerce HTML Relative Report Path, business reports is stored
under /QIBM/UserData/WebCommerce/instances/*instance_name*/WCA/reports. If this
directory is changed during WebSphere Commerce configuration, you must
provide the new subdirectory name in the **WC HTML Relative Report Path**
during WebSphere Commerce Analyzer configuration.

Note that you only enter the relative subdirectory path, and not the full path.

Before user traffic starts

Before user traffic starts, you must enable the **UserTrafficEventListener**,
CampaignRecommendationStatisticsListener and
CampaignRecommendationListener components in the WebSphere Commerce
Configuration Manager. If these components are not enabled, some of the business
reports will contain no data. For instructions on enabling components using the
WebSphere Commerce Configuration Manager refer to the WebSphere Commerce
online help. Information on how to access the WebSphere Commerce online help is
in Appendix A, "Where to find more information" on page 27.

Chapter 4. Collaboration

Whether it is a Buyer and Seller discussing details of a purchasing agreement, or a Customer Service Representative assisting a customer in placing an order, e-commerce collaboration is necessary to maintain the communication flow between parties. Traditionally, exchange of information has been achieved through phone or fax. WebSphere Commerce supports e-commerce collaboration functionality by offering two Web-based features within the WebSphere Commerce Accelerator:

- > Business > Professional The customer care feature provides real-time customer service support by way of a synchronous text interface using the Lotus Sametime Server. A customer may enter the site, and click a link on the store page to connect to a Customer Service Representative (CSR) so that the two parties can communicate or chat over the Internet. A CSR accesses the customer care interface through the WebSphere Commerce Accelerator. In addition, the CSR can view the store page where the customer needs assistance, and retrieve shopping cart and profile information. This interface also allows the CSR to chat with other CSRs. To use Sametime, this must first be installed and configured with WebSphere Commerce. For installation instructions, see "Installing customer care".

- > Business Collaborative workspaces provides a collaborative interface using Lotus QuickPlace to support business discussions, such as negotiating contract terms and conditions between a Buyer and a Seller (or Account Representative for the Seller) and amongst the business users within the Seller's organization. Collaborative workspaces support asynchronous communication. Collaborative workspaces can be created by any role other than the Buyer, by using the WebSphere Commerce Accelerator and the WebSphere Commerce default QuickPlace template. Only an Account Representative or Account Manager with QuickPlace Manager access to a collaborative workspace can add Buyers to the workspace. To use collaborative workspaces, member data must be on an LDAP server with WebSphere Commerce, not a relational database. For installation instructions on configuring an LDAP server, see Chapter 1, "Using Lightweight Directory Access Protocol with WebSphere Commerce" on page 3. The details about the collaborative workspaces and workspace member information are managed through the WebSphere Commerce system. Any discussion threads, postings, or file attachments used for collaboration are stored on the QuickPlace server.

Note: QuickPlace, Sametime, WebSphere Commerce, and LDAP should be installed on separate machines.

Installing customer care

> Business > Professional Lotus Sametime enables customer care collaboration. It provides customer service real-time support via synchronous text interface (instant messaging - IM) using Lotus Sametime between customer service representative and store customers or buyers.

Prerequisites

Lotus Sametime cannot be installed on the same machine as your WebSphere Commerce server or your LDAP server. Your Sametime system must meet the following requirements:

- Hardware requirements:
  - You require a Pentium II 350 MHz IBM-compatible personal computer.
  - A minimum of 500 MB free disk space.
  - A minimum of 256 MB for Random Access Memory (RAM).
  - A local area network (LAN) adapter that is supported by the TCP/IP protocol.
- Software Requirements:
  - You must have one of the following operating systems installed:
    - Windows NT Server Version 4 with Service Pack 6a or above installed Sametime on your server. You can obtain the service pack at the following Web address:

      `http://www.microsoft.com`
    - Windows 2000 Server or Advanced Server with Service Pack 1 or later installed. You can obtain the service pack at the following Web address:

      `http://www.microsoft.com`

The following Web browsers are supported by Sametime:

- Microsoft Internet Explorer version 4 with Service Pack 2 applied, version 5.01, and version 5.5 with Service Pack 1 applied.
- Netscape Navigator version 4.5.
- Netscape Communicator version 4.7.

Installing Lotus Sametime

Sametime should be installed as a standalone server. To install Sametime, do the following on your Sametime server machine:

1. Log on to a Windows user ID that has Administrator authority.
2. Insert the Lotus Sametime CD into the CDROM drive.
3. Change to the *CD-drive*:*locale*\Server directory and click `setup.exe`. Where *locale* is your desired language.
4. A **Welcome** window opens. Click **Next** to continue.
5. The **License Agreement** screen opens. Review the terms of the license agreement and either accept or decline the agreement. If you accept the terms of the license agreement, the installation program will continue. If you decline the license agreement, the installation program will exit.
6. The **Sametime server** installation window opens. Click **Complete**.
7. The **Choose Installation Path** window opens. This window allows you to override the default installation path where Sametime is installed. When you have chosen your installation path, click **Next** to continue.
8. The **Start Copying Files** window opens. This window displays a summary of the selections you have made. Click **Next** to continue.
9. The **Installation Complete** window opens. Select **Yes, I want to restart my computer now** and click **Finish**.
10. When your computer restarts, log on to a Windows user ID that has Administrator authority. This Windows user ID must be the same ID used when installing Sametime.

11. On the **Setting up the Sametime Server** panel, select **Set Up as a Server in a Sametime Community (Web only)**. Click **Next** to continue.
12. **The Set Up in a Sametime Community** window opens. Do the following:
    a. Enter your WebSphere Commerce Instance Name as the Sametime community name (recommended).
    b. Enter a name in the **First Name** field.
    c. You may leave the **Middle Initial** field empty.
    d. Enter a user name in the **Last Name** field. The name entered in the **Last Name** field becomes the administrator's log in name for the Sametime server.
    e. Enter a password in the **Password** field. Your password must contain at least 8 characters. You are required to repeat the password.

    Click **Next** to continue.
13. The **Select Directory Type** panel opens. Select **Domino directory** and click **Next** to continue.
14. When the setup process is complete the Setup Finished window opens. Click **OK** to continue.

A progress bar opens displays the progress of the Sametime services. Once the services have been started, Sametime attempts to open the Lotus Sametime homepage. If the page fails to open, click refresh on your Web browser.

Installing customer care on the Sametime server

You must now install and configure the customer care component. To install and configure customer care, do the following:

1. Insert the WebSphere Commerce Disk 1 CD and change to the `CD-drive:\Sametime` directory.
2. Run `setup.exe` to install customer care.
3. The **Choose Setup Language** window opens. Select a language from the list and click **OK**.
4. A **Welcome** window opens. Click **Next** to continue.
5. The **License Agreement** screen opens. Note that a DOS window may briefly appear on your screen prior to the license agreement being displayed. Review the terms of the license agreement and either accept or decline the agreement. If you accept the terms of the license agreement, the installation program will continue. If you decline the license agreement, the installation program will exit.
6. The Choose Destination window opens. This window allows you to override the default installation path. Accept the default path and click **Next**.
   CAUTION:
   We strongly suggest that you do not override the default path. The customer care installation program is designed to copy the applet code to specific locations within the Sametime Server installation directory. Choosing another directory will cause errors.
7. The **Setup Complete** window opens. Click **Finish** to continue.
8. In the **Services** window stop the **IBM WS AdminServer 4.0** service.
9. You must now open the Configuration Manager on your WebSphere Commerce machine. To open the Configuration Manager, do the following:
   a. Ensure that the WebSphere Commerce Configuration Manager process is running.

b. Start the Configuration Manager.

c. Enter your Configuration Manager user ID, and password.

d. Expand your host name.

e. Expand **Instance List**.

f. Expand your instance node (for example, demo).

g. Expand **Instance Properties**.

h. Expand **Collaboration**.

i. Click **Sametime**, and do the following:

1) Select the **Enable** check box.

2) Enter the fully qualified host name of your Sametime server in the **Host Name** field.

3) Enter the registration URL of your Sametime server in the **Registration URL** field.

4) Enter the applet code base URL in the **Applet CodeBase URL** field. The applet code base URL is the location of the applet code. Ensure that the applet code is installed on the Sametime server machine.

5) Click **Apply**. A message appears indicating that Sametime has been successgully configured for WebSphere Commerce. Click **OK** to continue.

6) Close the WebSphere Commerce Configuration Manager.

7) In the **Services** window stop the **IBM WS AdminServer 4.0**.

Configuring the Sametime self-registration feature

When Sametime is installed on the same machine as a Domino server there are additonal steps that you must take to enable the self-registration feature.

To enable self-registration, do the following:

1. You must set STCENTER.NSF as your default home page. To set STCENTER.NSF as your default home page, you must do the following:

   a. Launch the Lotus Administration client. You must log on using the server administrator user ID and password.

   b. Select **File > Open Server**, and select the Domino server where Sametime exists.

   c. Click the **Configuration** tab.

   d. Select the server document for the Domino server where Sametime exists.

   e. Select the **Internet Protocols** tab.

   f. Select the **HTTP** tab.

   g. In the mapping section, enter STCENTER.NSF **Home UR**L field.

   h. Save and close the server document.

   i. Restart your Domino server.

2. Set user access rights for the Domino directory. To set user access rights for the Domino directory, do the following:

   a. Launch the Lotus Administration client. You must log on using the server administrator user ID and password.

   b. Select **File > Open Server**, and select the Domino server where Sametime exists.

   c. Select the **Files** tab. In the **Show Me** field, select **Database Only**.

   d. Select the server document for the Domino server where Sametime exists.

e. Right-click the server document, and select **Access Control > Manager**. Add the **Sametime Development/Lotus Notes Companion Products** ID, and assign the following access privileges:

```
Access Level: Author

Allowed Access: Create Document, Create Personal folders/views,
create LotusScript/java agent, Write public documents

Roles: [Group Creator],[Group Modifier],[User Creator],[User Modifier]
```

f. Save and close the server document.

3. Enable the self-registration link. To enable the self-registration link, do the following:

a. Enter the following URL in a Web browser:

```
http://Sametime_server/stcenter.nsf
```

b. Click the **Administer the Server** link.

c. Log in using the administrator user ID and password.

d. Click the **Domino Directory > Domino** link and select **Allow people to register themselves in the Domino Directory**.

e. Click **Update**.

4. You should now test the self-registration feature. To test the self-registration feature, do the following:

a. Enter the following URL in a Web browser:

```
http://Sametime_server/stcenter.nsf
```

b. Click the **Register** link.

c. Select the **Register to use Sametime** link.

d. Enter your user information on the **Register to use Sametime** page, and click **Submit Request**. A confirmation page should appear. Your user is registered.

For information on how to configure your store to use collaboration, see "Where to find more information" on page 22.

Installing collaborative workspaces

▶Business The collaborative workspaces feature is available with WebSphere Commerce Business Edition. Lotus QuickPlace is the self-service Web tool for team collaboration. QuickPlace enables the creation of a secure and central workspace on the Web instantly. Structured for immediate participation, teams use QuickPlace to to the following:

- Coordinate people, tasks, plans, and resources.
- Collaborate share ideas and discussion, resolve issues, coauthor documents, exchange files, manage due diligence.
- Communicate actions and decisions, key findings and lessons, publish knowledge captured to a broader base of readership.

Teams use QuickPlace for project management, rapid response to ad-hoc initiatives, team Websites, and to facilitate discrete business processes that span the extended enterprise and value chain.

Prerequisites

QuickPlace prerequisites

Lotus QuickPlace cannot be installed on the same machine as your WebSphere Commerce server, or your LDAP server. Your QuickPlace server must meet the following requirements:

- Hardware requirements:
  - A minimum of 150 MB free disk space (200 MB recommended).
  - A minimum of 128 MB of Random Access Memory (256 MB recommended).
  - A video card that supports 256 colors.
  - A graphics-capable monitor with a color depth of at least 256 colors.
  - A local area network (LAN) adapter that is supported by the TCP/IP protocol.
- Software Requirements:
  - You must have one of the following operating systems installed:
    - Windows NT Server Version 4.0 with Service Pack 6a or above installed on your QuickPlace server. You can obtain the service pack at the following Web address:

      `http://www.microsoft.com`
    - Windows 2000 Server or Advanced Server with Service Pack 1 or later installed. You can obtain the service pack at the following Web address:

      `http://www.microsoft.com`
  - IBM SecureWay Directory Server 3.2.1 installed and configured for WebSphere Commerce, with LDAP enabled.

  The following Web browsers are supported by QuickPlace:
  - Microsoft Internet Explorer version 4 with Service Pack 2 applied, and version 5.
  - Netscape version 4.5, 4.6, and 4.7.
  - Lotus Notes version 4.6 and above using integrated Microsoft Internet Explorer version 4 and above.
  - Microsoft Internet Explorer version 5 for Macintosh.
  - Netscape version 4.5, 4.6, and 4.7 for Macintosh.

Installing Lotus QuickPlace Server

QuickPlace should be installed as a standalone server. To install QuickPlace, do the following:

1. Insert the QuickPlace CD into your QuickPlace server's CDROM drive.
2. Change to the root directory of the QuickPlace CD and run `setup.exe`.
3. The **Choose Setup Language** window opens. Select a language from the list and click **Next**.
4. A **Welcome** window opens. Click **Next** to continue.
5. The **Choose Destination** window opens. This window allows you to override the default installation path for some of the products that are being installed. When you have chosen your installation paths, click **Next** to continue.
6. The **License Agreement** screen opens. Note that a DOS window may briefly appear on your screen prior to the license agreement being displayed. Review the terms of the license agreement and either accept or decline the agreement.

If you accept the terms of the license agreement, the installation program will continue. If you decline the license agreement, the installation program will exit.

7. On the **User ID and Password** window, enter a user ID and password. Verify your password and click **Next** to continue. An installation progress bar opens.

8. The **Congratulations** window opens. Click **OK** to complete the installation.

To verify that your installation completed successfully, do the following:

- A browser will pop up after the QuickPlace installation. Click the links to access the QuickPlace server.

Configuring QuickPlace

To configure the QuickPlace Server, do the following:

1. Enter the following URL in a browser:

   `http://host_name/QuickPlace`

2. Sign in using the adminstrator's user ID and password.

3. Navigate to the **Server Settings ➜ Security** page. In the **Who can create new QuickPlaces on this server?** field, select **Only specific users (or groups) who provide a name and password**.

4. Set the User Directory to LDAP Server by doing the following:

   a. Click on **User Directory**, then **Change Directory**.

   b. In the **Type** field, select **LDAP Server**.

   c. In the **Name** field, type the *host_name* name of the LDAP server.

   d. In the **Search Database** field, type `o=root organization`.

   e. On the menus, check the box marked **check to use credentials specified below when searching the directory** and provide the user name and password for LDAP , for example, user name: cn=root, password: root.

   f. Select **Allow managers to create new users in each QuickPlace**.

   g. Click **Next** to continue.

   h. Close your Web browser.

5. In the **Services** window stop the **Lotus QuickPlace Server** service.

6. Insert the WebSphere Commerce Disk 1 CD and change to the *CD-drive*`:\QuickPlace` directory.

7. Run `setup.exe` to install IBM Collaborative Workspaces.

   a. The **Choose Language** window appears. Select your desired language.

   b. A **Welcome** window opens. Click **Next** to continue.

   c. The **License Agreement** screen opens. Review the terms of the license agreement and either accept or decline the agreement. If you accept the terms of the license agreement, the installation program will continue. If you decline the license agreement, the installation program will exit.

   d. The **Choose Destination** window opens. This window allows you to override the default installation path where QuickPlace is installed. When you have chosen your installation path, click **Next** to continue. An installation progress bar opens.

   e. A **Setup Complete** window appears. Click **Finish**.

   f. Stop your LDAP server from the SecureWay Directory Server Web Admin page. You can access the server admin page by entering the following URL in a Web browser on your LDAP machine:

      `http://host_name/ldap`

8. Copy *drive*:\CollabWorkspace\ldap\etc\V3.modifiedschema file from your QuickPlace server to the *drive*:\LDAP_installation_directory\etc\V3.modifiedschema on your LDAP server.

9. Restart the LDAP server or the following services:
   - IBM SecureWay Directory Server V3.2
   - DB2–LDAPDB2

10. In the **Services** window start the **Lotus QuickPlace Server**.

Configuring the QuickPlace server to work with WebSphere Commerce

To configure the QuickPlace server to work with WebSphere Commerce, do the following:

1. On your WebSphere Commerce machine, start the **IBM WC Configuration Manager Server** service.

2. On your WebSphere Commerce machine, open Configuration Manager.

3. Open *instance_name* → **Instance Properties** → **Collaboration** → **CollaborativeWorkspaces** → **QuickPlace**.

4. Enter your network domain name in the **Domain** field.

5. Enter the fully qualified QuickPlace server host name in **Host** field.

6. Enter the QuickPlace administrator login in **Administrator Login** field.

7. Enter the QuickPlace administrator password in **Administrator Password** field.

8. Enter the Collaboration Administrator's user name in the **Collaboration Administrator** field.

9. Enter the Collaboration Administrator password in the **Collaboration Administrator Password** field.

10. Select the correct locale for your installed QuickPlace server. For example, en_US.

11. Click **Apply**

12. The passwords will automatically be encrypted when the update is done successfully.

13. Restart the WebSphere Application Server.

Optional configurations

This section describes how to do the following:
- Create a template for QuickPlace.
- Set up email notification.
- Configure QuickPlace and Sametime to exist on the same server.
- Enable QuickPlace to use UTF-8.

Creating a template for QuickPlace

For information on creating custom templates for Lotus QuickPlace, please refer to the *Lotus Customizing QuickPlace* guide. This document is available from the IBM Redbook Web site at the following Web address:

http://www.redbooks.ibm.com/

Note: When creating a template for QuickPlace, the template name cannot contain spaces.

Setting up email notification

One feature of Collaboration is email notification. To set up email notification, do the following:

Note: When configuring email notification, both the sender and receiver must have an email address. That is, if you are logged on as `wcsadmin` and you want to add a user with email notification, you must first add an email address for `wcsadmin` through the WebSphere Commerce Administration Console. If either sender or receiver does not have an email, the email notification will not be sent.

1. Log on to the WebSphere Commerce Administration Console as a site administrator.
2. From the Configuration menu, select **Transports**.
3. Select the check box beside **E-mail** and click **Configure**.
4. Type the name of your email server in the **Host** field.
5. Ensure that the **Protocol** is set to SMTP, then click **OK**.
6. From the Configuration menu, select **Message Types**.
7. Click **New**.
8. Select **CollabEmail** in the Message Type drop-down list .
9. Set the Message Severity to: 0 to 0.
10. Set the Transport to **E-mail**.
11. Set the Device Format to **Standard Device Format**.
12. Click **Next**, then **Finish**.

Note: When configuring email notification, both the sender and receiver must have an email address. That is, if you are logged on as `wcsadmin` and you want to add a user with email notification, you must first add an email address for `wcsadmin` through the WebSphere Commerce Administration Console. If either sender or receiver does not have an email, the email notification will not be sent.

Configuring QuickPlace and Sametime to exist on the same server

Attention: If you are installing QuickPlace and Sametime on the same Domino server machine, you must install them in the following order:

1. Install Sametime.
2. Install QuickPlace.

If you have already installed QuickPlace before installing Sametime, you must uninstall it, and reinstall in the above order. Should you want to install QuickPlace on top of Domino, you need to ensure that the version release of QuickPlace corresponds with the appropriate release version of Domino. For example, QuickPlace 2.08 works as an overlay install on top of Domino 5.08.

If you do not have a Domino server installed, do the following to configure QuickPlace and Sametime to exist on the same server:

1. Stop the Sametime server.
2. Open your browser to `http://QuickPlace_server_name/names.nsf`.

3. Logon as the QuickPlace administrator.

4. Select **Server-Servers**, and open the server document..

5. Select **Edit Server**.

6. Select **Ports**, then **Internet Ports**.

7. Change the TCP/IP port number to a port number that is not currently in use.

8. Click **Save and Close**.

9. Restart the QuickPlace server.

10. The hostname for the QuickPlace server is now
    `http://`*`QuickPlace_server_name:Port_number`*. For example,
    `http://MyQuickPlace:1080`.

11. On your WebSphere Commerce machine, start the **IBM WC Configuration
    Manager Server** service.

12. Expand *host_name* > **Instance List** > *instance_name* > **Instance Properties >
    Collaboration > CollaborativeWorkspaces > QuickPlace**.

Configuring QuickPlace to use UTF-8

To configure QuickPlace to use the UTF-8 format, you must do the following:

1. Open a Web browser and enter the following URL:

   `http://`*`QuickPlace_server_hostname`*`/names.nsf`

2. Click **Servers – Servers**.

3. Double-click on the server document.

4. Click **Edit Server**.

5. Click **Internet Protocols**.

6. Click **Domino Web Engine**.

7. In the **Use UTF-8 for output** field select **Yes**.

8. Restart the QuickPlace server.

Where to find more information

Once you have installed and configured any collaboration components you must
enable them for your store. If you are using either the ToolTech, or NewFashion
samples stores included with WebSphere Commerce, see the following for more
information:

- *IBM WebSphere Commerce Store Developer's Guide*.
- WebSphere Commerce online help topic "Creating a store using a sample."

If you are developing a store not based on a sample, there are specific steps you
need to follow to enable collaboration. For information on how to enable
collaboration for your store see the following:

- *IBM WebSphere Commerce Store Developer's Guide*.

For specific information regarding Sametime and QuickPlace, please see the
documentation provided by Lotus.

Chapter 5. Installing Segue SilkPreview™ 1.0

Segue Software's SilkPerformer enables you to ensure the reliability, scalability and performance of your mission-critical application. SilkPerformer simulates thousands of users interacting with Web, application and database servers with one script, creates the most realistic models simulating different business environments for Internet, ERP and legacy systems, and provides a repository of information to easily analyze and report results throughout application development. With SilkPerformer you can ensure the scalability and performance of your e-business system, and be confident you are deploying high quality, reliable applications on time that meet your specifications. For more information on SilkPerformer, see the following Web site:

http://www.segue.com/html/s_solutions/s_performer/s_performer.htm

SilkPreview by Segue Software, Inc. is a free software package that provides you an introduction to load and scalability testing. SilkPreview monitors the access times of Web pages, and gives you valuable insight into whether or not your application is suffering performance degradation.

Real-world load testing is very complex, and covers a lot more territory. SilkPreview is only a sample of the functionality and user interface of SilkPerformer, Segue's high-end load testing tool. The system requirements for SilkPreview include Windows NT 4.0 with Service Pack 5 or higher or Windows 2000 and a Windows installer service (redistributed on SilkPerformer media).

Note: Although SilkPreview only runs on Windows NT or Windows 2000, you can use it to monitor the access times of any WebSphere Commerce Web pages, regardless of the operating system on which you are running WebSphere Commerce.

To install SilkPreview, insert the SilkPreview CD in your CD-ROM drive. The install wizard launches.

1. Click **Next**.
2. If you have read the license agreement, and agree to its terms, select **I accept the terms in the license agreement**.
3. Click **Next** twice.
4. Click **Install** to begin the installation. Wait until the setup process completes.
5. Click **Finish**. The SilkPreview application launches. (If you have an earlier release of Windows NT, you must reboot your machine after installing. The SilkPreview application launches as soon as you have restarted.)

You are prompted to either enter your license key or immediately begin using SilkPreview. You can request the license key from the following Web address:

http://www.segue.com/websphere

For additional installation information refer to the installation notes found in the \data folder in the CD, or at the following Web address:

http://www.segue.com/websphere/s_silkpreview/s_silkpreview_install.htm

To learn more about SilkPreview and Segue's e-business reliability solutions, contact Segue toll free, in North America, at 866- 449-2495. International users can

contact Segue at 781-402-5908.

Part 2. Appendixes

Appendix A. Where to find more information

More information about the WebSphere Commerce system and its components is available from a variety of sources in different formats. The following sections indicate what information is available and how to access it.

WebSphere Commerce information

The following are the sources of WebSphere Commerce information:
- WebSphere Commerce online help
- WebSphere Commerce portable document format (PDF) files
- WebSphere Commerce Web site

Using the online help

The WebSphere Commerce online information is your primary source of information for customizing, administering, and reconfiguring WebSphere Commerce. After you have installed WebSphere Commerce, you can access topics in the online information by visiting the following URL:

```
http://host_name/wchelp/
```

where *host_name* is the fully qualified TCP/IP name of the machine where you have installed WebSphere Commerce.

Locating the printable documentation

Some of the online information is also available on your system in PDF files, which you can view and print using Adobe® Acrobat® Reader. You can download Acrobat Reader for free from the Adobe Web site at the following Web address:

```
http://www.adobe.com
```

Viewing the WebSphere Commerce Web site

WebSphere Commerce product information is available at the WebSphere Commerce Web site:

```
http://www.ibm.com/software/webservers/commerce/
```

A copy of this book, and any updated versions of this book, are available as PDF files from the Library section of the WebSphere Commerce Web site. In addition, new and updated documentation may also be available from the Web site.

IBM HTTP Server information

IBM HTTP Server information is available at the following Web address:

```
http://www.ibm.com/software/webservers/httpservers/
```

The documents are in HTML format, PDF files, or both.

Payment Manager information

Payment Manager documents are available after installation of the Payment Manager and can be accessed from the Payment Manager Tasks Web page, accessible from the AS/400® Tasks Page at `http://host_name:2001` where `host_name` is the TCP/IP host name of the AS/400 system. The link name in the navigation frame is **Documentation**.

Additional Payment Manager information is available through the library link on the Payment Manager Web site:

`http://www.ibm.com/software/webservers/commerce/payment`

The following Payment Manager documentation is available:

- The *IBM WebSphere Payment Manager for Multiplatforms Installation Guide* PDF file format (`paymgrinstall.pdf`)
- The *IBM WebSphere Payment Manager Administrator's Guide* PDF file format (`paymgradmin.pdf`)
- The *IBM WebSphere Payment Manager for Multiplatforms Pogrammer's Guide and reference* PDF file format (`paymgrprog.pdf`)
- The *IBM WebSphere Payment Manager for Multiplatforms for SET™ Supplement* , in PDF file format (`paymgrset.pdf`)
- The *IBM WebSphere Payment Manager for Multiplatforms Cassette for VisaNet Supplement* PDF file format (`paymgrvisanet.pdf`)
- The *IBM WebSphere Payment Manager for Multiplatforms for CyberCash Supplement* , in PDF file format (`paymgrcyber.pdf`)
- The *IBM WebSphere Payment Manager for Multiplatforms for BankServACH Supplement* , in PDF file format (`paymgrbank.pdf`)
- The Payment Manager README file, in HTML format (`readme.framework.html`)
- The IBM Cassette for SET README file, in HTML format (`readme.set.html`)
- The IBM Cassette for VisaNet README file, in HTML format (`readme.visanet.html`)
- The IBM Cassette for CyberCash README file, in HTML format (`readme.cybercash.html`)
- The IBM Cassette for BankServACH README file, in HTML format (`readme.bankservach.html`)

The *Secure Electronic Transactions* section of the WebSphere Commerce online help also contains Payment Manager information.

WebSphere Application Server

WebSphere Application Server information is available at the WebSphere Application Server Web site:

`http://www.ibm.com/software/webservers/appserv`

Other IBM publications

You can purchase copies of most IBM publications from your IBM authorized dealer or marketing representative.

Appendix B. Program specifications and specified operating environment

This version of WebSphere Commerce supports the following operating environment:

- OS/400® for iSeries V5R1

WebSphere Commerce 5.4 includes the following components:

WebSphere Commerce Server

The WebSphere Commerce Server handles the store, and commerce-related functions, within your e-commerce solution. Functionality is provided by the following components:

- Tools (Store Services, Loader package, Commerce Accelerator, Administration Console)
- Subsystems (catalog, member, negotiation, order)
- Product Advisor
- Common server run time
- System management
- Messaging services
- WebSphere Application Server

Store Services

The Store Services provides a central location for creating, customizing, and maintaining certain operational features of a store.

Loader package

The Loader package allows the initial load of product information through ASCII and XML files, as well as incremental updates of complete or partial information. Online catalogs are updated using this tool.

WebSphere Commerce Accelerator

Once your store and product data have been created, use the WebSphere Commerce Accelerator to manage your store and to facilitate your business strategies. WebSphere Commerce Accelerator provides an integration point for all functionality that WebSphere Commerce delivers for operating an online store, such as store and product management, marketing, customer orders, and customer service.

WebSphere Commerce Administration Console

The Administration Console allows a Site Administrator or Store Administrator to perform tasks related to site and store configuration, including the following:

- User and group management (access control)
- Performance monitoring
- Messaging configuration
- IBM WebSphere Payment Manager functions
- Brokat Blaze Rules administration

The following products are bundled with, and supported by, WebSphere Commerce 5.4:

IBM Payment Manager 3.1.2
Payment Manager provides real-time Internet payment processing for merchants using a variety of methods including SET (Secure Electronic Transaction), and Merchant Originated Payment.

WebSphere Application Server 4.0
WebSphere Application Server is a Java-based application environment for building, deploying and managing Internet and Intranet Web applications.

IBM WebSphere Commerce Analyzer 5.4
IBM WebSphere Commerce Analyzer is a new, optionally installed feature of WebSphere Commerce. A WebSphere Commerce-specific entry edition of IBM WebSphere Commerce Analyzer provides reports for customer profiling and monitoring campaign performance. The reports cannot be customized. Note that you cannot install IBM WebSphere Commerce Analyzer without Brio Broadcast Server.

Brio Broadcast Server
The Brio Broadcast Server is a batch processing server that automates query processing and report distribution. Although the Brio Broadcast Server can deliver large amounts of data to many people, security safeguards are built into the product to enable administrators to tightly control database access and document distribution.

Segue SilkPreview 1.0
Segue SilkPreview provides a repository of information to analyze and report results throughout application development.

WebSphere Commerce 5.4 Recommendation Engine powered by LikeMinds
Macromedia LikeMinds provides product recommendations and targeted promotions for each individual Web visitor. It is a personalization server based on collaborative filtering and market basket analysis.

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