

Transaction Designer

Version 4.3.0.9

Quick Start Guide
Revision 4.9

CLE|E|O

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Introduction

Overview

This Installation Guide provides first-time and upgrade installation information for the Transaction Designer. It also includes licensing, initial configuration, and testing information. It is intended to be a starting point for users of the Transaction Designer.

The Transaction Designer is one component of Cleo's *Transaction Development Kit*, a set of tools designed to simplify program access to mainframe and application server data. This kit is composed of:

- *Transaction Designer (TD)* –records screens and creates transactions.
- *Transaction Designer for XML (TD-XML)* –imports or captures XML documents and creates transactions.
- *Transaction Processor (TP)* – processes the transactions in real time.
- *Transaction Processor Client (TP Client)* – provides the basic API functions.
- A set of *Transaction Processor Administration, Configuration, and Connection Manager* tools (TP Admin) – web based utilities used to set configuration parameters, provide session monitoring, display log messages and statistics for the TP Service and initialize the connection pools for redundant and secure client support.

Other supporting documents include (available at <http://www.cleo.com/>):

Transaction Designer User's Guide

This guide explains how to record screen clips and create transactions.

Transaction Designer For XML User's Guide

This guide explains how to import or capture XML documents and create transactions.

Transaction Processor Client Quick Start Guide

This guide lists prerequisites and provides an installation procedure for the Transaction Processor Client.

Transaction Processor Administration Guide

This document describes the functions provided by the Transaction Processor Configuration, Administration, and Connection Manager Tools.

Transaction Processor Programmer's Guide

This guide provides information about developing applications that utilize the Transaction Processor.

Installation & Removal

WARNING! – Back up Transactions First

- Before beginning the installation process, make sure to back up any Transaction Sets created using any previous version of the Cleo Transaction Designer. If you previously installed the TD in the default location, the Transaction Sets will be located in C:\Program Files\Cleo TD\trans. Move all subdirectories of this folder to another location such as C:\Temp.
- After installation is complete, move the Transaction Sets back into the CleoTD\trans directory.

Software Prerequisites

Operating System: Windows 2000 Professional, Windows 2000 Server, Windows 2000 Advanced Server, Windows XP Professional, Windows VISTA, Windows 2008, Windows 2008 R2, or Windows 7.

Hardware Prerequisites

- PC
- 52 MB disk space required
- CD Drive
- Network Card/Modem

Pre-Installation Check List

Before installing the Transaction Designer,

- **Any previous versions of the Transaction Designer must be uninstalled using Add/Remove programs**

Locate and have available the following:

- Transaction Designer Quick Start Guide (this document)
- Transaction Designer Installation CD

OR

Download from Cleo Website of Transaction Designer Installer
install.exe

Install the Transaction Designer

1. Turn on the PC
2. Logon to Windows as an administrator.
3. After you have downloaded the Transaction Designer from the Cleo Website Launch the installer by double clicking on the “install.exe” file..
4. The first screen introduces you to the *InstallAnywhere* program, which guides you through the installation. All instructions from *InstallAnywhere* are meant to be self-explanatory. Read and then follow the instructions as described on each screen. (See the following section for details.)

InstallAnywhere Details

InstallAnywhere walks you through a set of installation steps. These steps are displayed on the left side of the screen, and will be checked upon step completion:

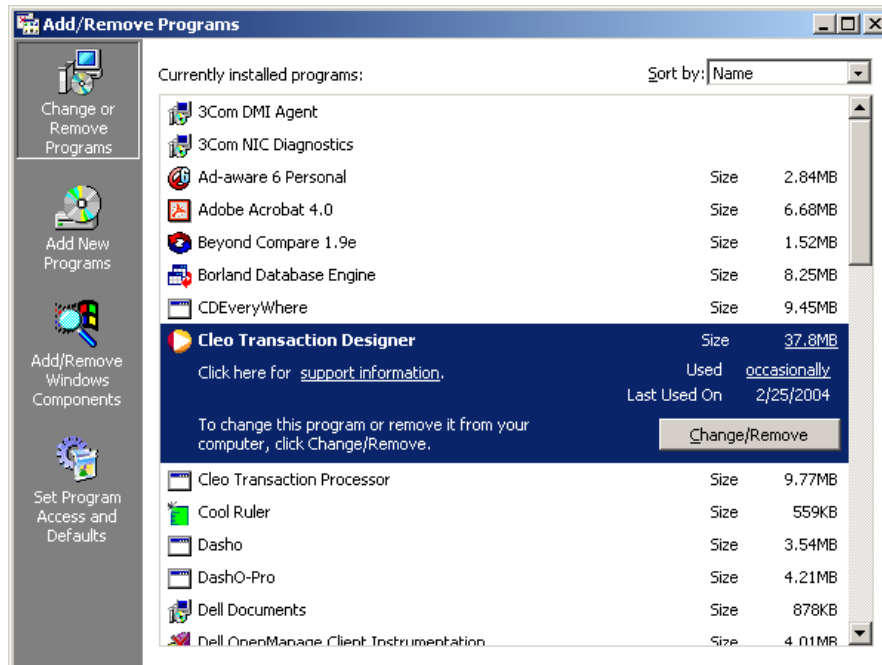
1. Read the Introduction Screen and then click **Next**.
2. Read the License Agreement. Select “I accept the terms of the License Agreement”, and then click **Next**.
3. Choose your install folder. The program defaults to C:\Program Files\CleoTD. Click **Choose** to search for (and then select) another folder location, or click **Next** to accept the default.
NOTE: If you are installing on Vista or Windows 7 DO NOT USE the default “C:\Program Files\CleoTD” install folder. Please create a new folder that is not under the “Program Files” folder. The Cleo Transaction Designer writes configuration files and log files to the CleoTD installation folder and Vista and Windows 7 do not allow writing under the “Program Files” directory.
4. Choose a shortcut folder. Select from the list provided, or leave at the default. Click **Next**.
5. Review the Pre-Installation Summary and then click **Install**.
6. Upon completion of the install, click **Done**. The system will automatically reboot.

Removing the Transaction Designer or Conversion Utility

Both the Cleo Transaction Designer and the Conversion Utility can be removed when they are longer needed. See Converting Transaction Sets on page 10 for a description of the Conversion Utility.

To uninstall the Transaction Designer or Conversion Utility:

1. Launch Add/Remove Programs in the Control Panel.
2. Click Change/Remove under Cleo Transaction Designer to remove the Transaction Designer, or click Change/Remove under TD Converter to remove the Conversion utility.
3. Follow the instructions displayed on the screen. When the removal of the Transaction Designer has been completed, **reboot** your PC.



Licensing

Obtain a License

To obtain a license, contact Cleo at SupportEN@cleo.com. A form will be sent for you to fill out. The Host ID name of your system (see below) and Serial Number (located on the CD case) must be provided to obtain a license. Cleo will send you the license file that you'll need to install.

NOTE: *The Host ID is a unique alphanumeric string that identifies a particular computer. The Host ID is used to generate a license key. The license key that is generated is therefore bound to a single computer and cannot be transferred to any other computer.*

View the Host ID

1. Invoke the Transaction Designer. Without a license, the Transaction Designer will display the following message:

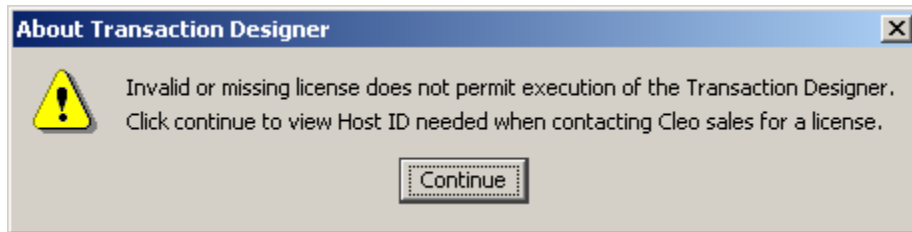


Figure 1: Invalid/Missing License

2. Click **Continue**. A dialog similar to the following is displayed:



Figure 2: Host Id Information

3. Record the Host ID information to forward to Cleo.
4. Close the dialog box by clicking **×**.

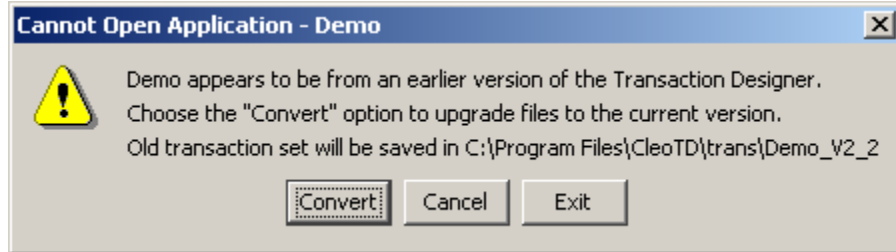
Install the License File

After you receive the license file from Cleo, perform the following:

1. Move the license file to the **%TD_HOME%\lic** folder. If you've installed the Transaction Designer in its default location, the path will be:
C: \Program Files\CleoTD\lic
2. Rename the license file to the exact name
cleotd.lic
3. The next time you launch the Transaction Designer, it will read the file and validate the license. You may confirm this by clicking on **View License** from the initial Transaction Designer screen.

Converting Transaction Sets

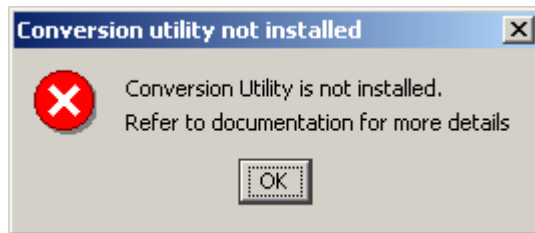
1. When opening a Transaction Set created using a previous version of the TD (2.2 or earlier), you will see the following message (“Demo” is the name of the transaction set in this example):



2. Click **Convert** and the Transaction Set will automatically be upgraded and opened. An archive of the old Transaction Set will be stored in the *trans* directory (e.g. C:\Program Files\CleoTD\trans). The folder name will be appended with the extension *_V2_2*.

Installing the Conversion Utility

If the TD Conversion Utility was not installed, you will see the following message when **Convert** is clicked:



1. Insert the Transaction Designer installation CD
2. Click on the folder named Conversion
3. Click on *convt.exe*
4. Read the Introduction Screen and then click **Next**.
5. Read the License Agreement. Select “I accept the terms of the License Agreement”, and then click **Next**.
6. Review the Pre-Installation Summary and then click **Install**.
7. Upon completion of the install, click **Done**.

Using the Sample Transaction Set

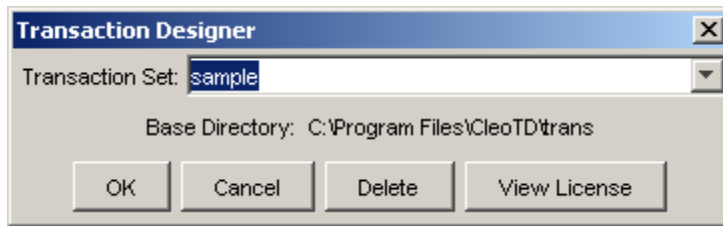
To introduce you to the Transaction Designer, Cleo has created a sample set of transactions so that you can quickly become familiar with the capabilities of the Transaction Designer. This sample transaction set uses the University of Florida mainframe for a simple login and query of the library card catalog.

Running this sample also will verify that the Transaction Designer is installed correctly.

Please refer to the Transaction Designer User's Guide for details on the various options.

Start the Transaction Designer

1. Launch the TD (e.g., From the Start Menu: **TDesigner**).
2. From the drop down list of Transaction Sets, choose "sample".



3. A screen similar to that shown in Figure 3 will be displayed. See the Transaction Designer User's Guide for a description of the various elements of the screen.

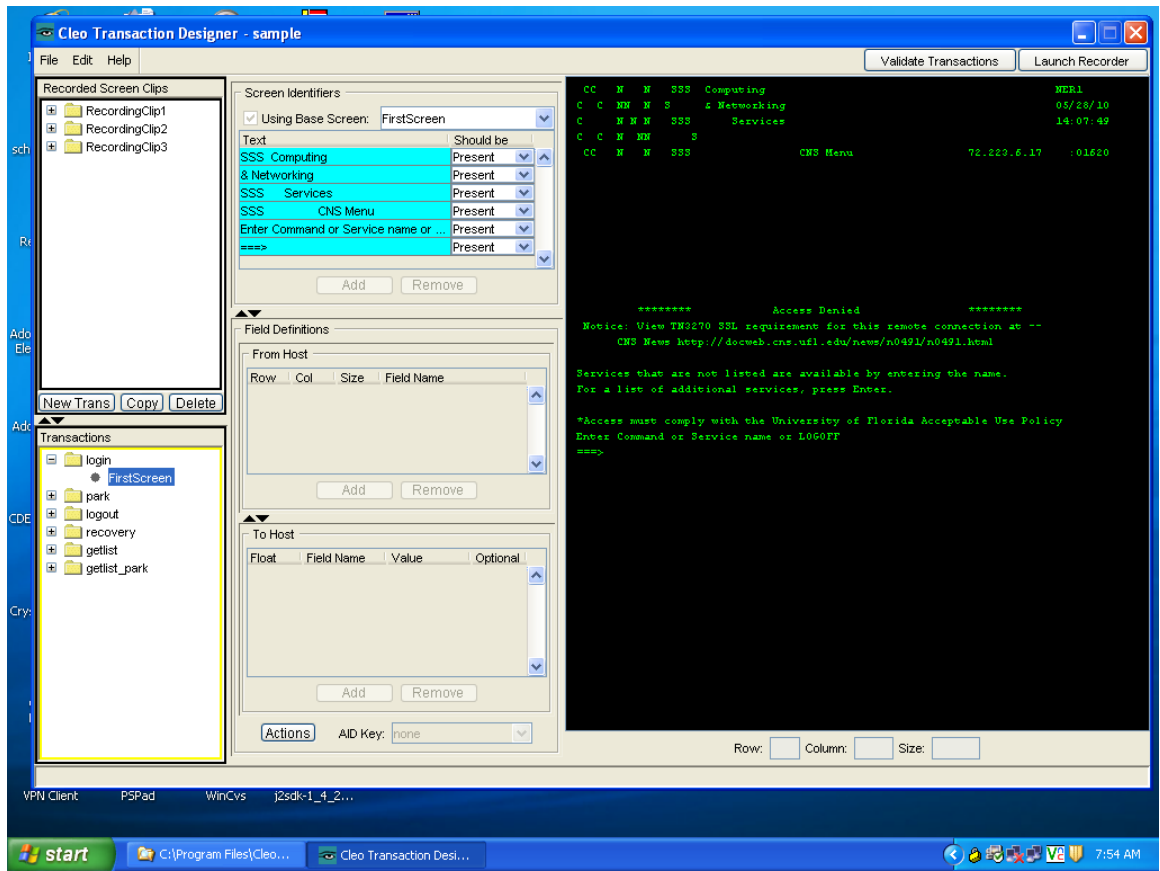
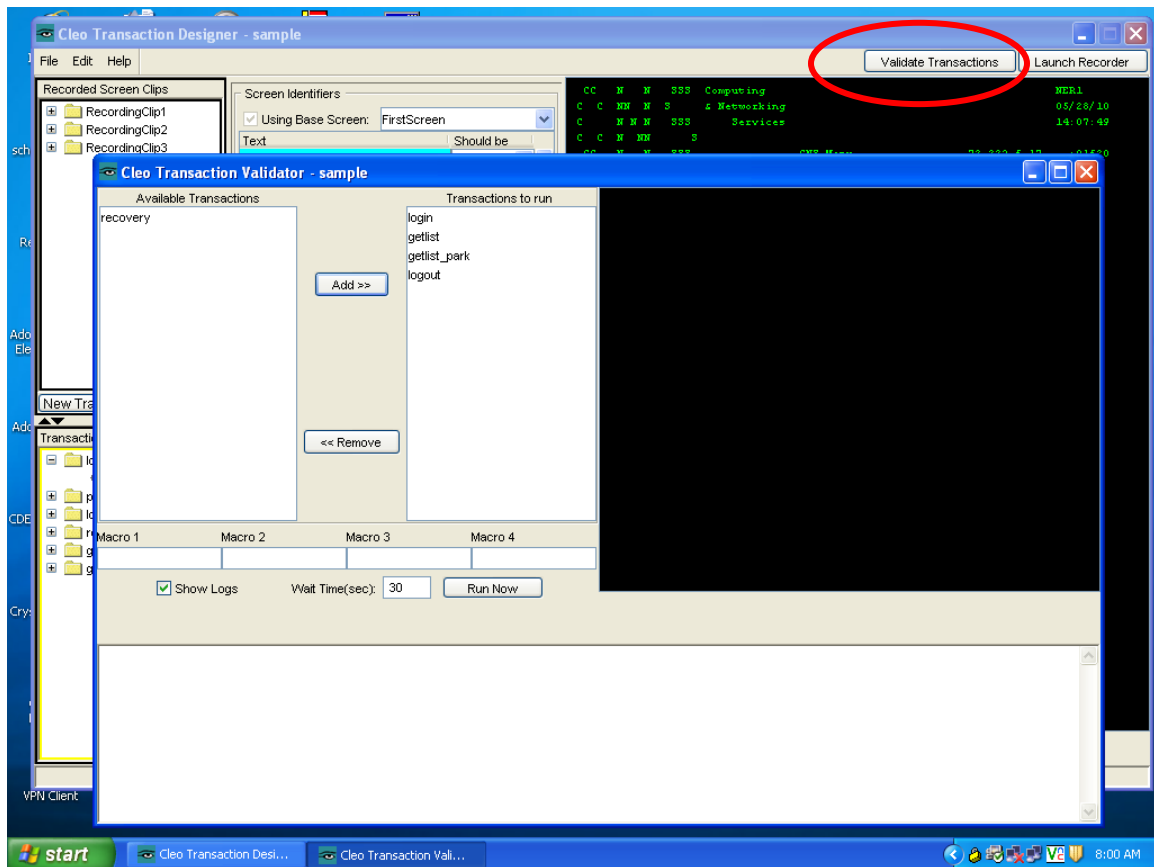


Figure 3: Transaction Set "sample"

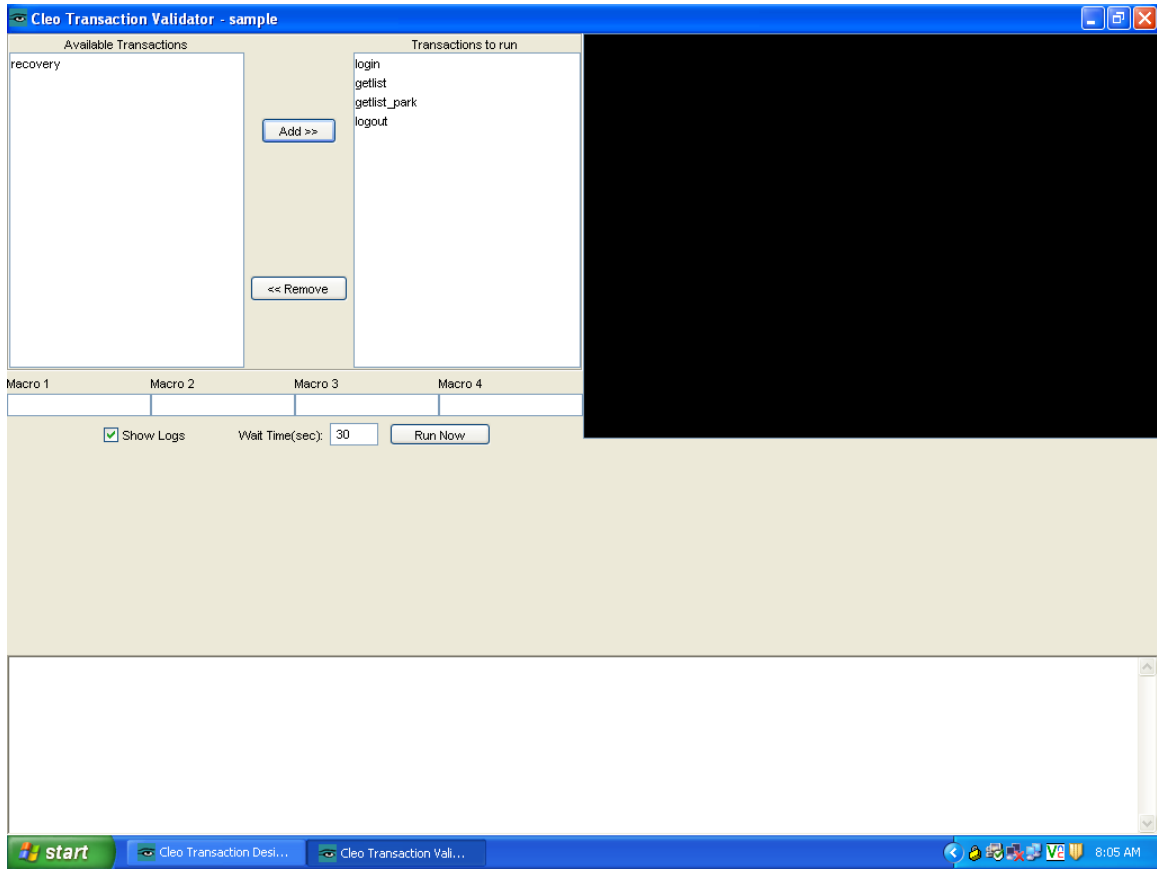
Testing the “sample” Transaction Set Using the Validator

To test “published” transactions, the Transaction Designer offers a Validator feature. This feature is accessible from the Validate Transactions button in the upper right-hand corner of the TD screen. This feature requires a host connection for validation.

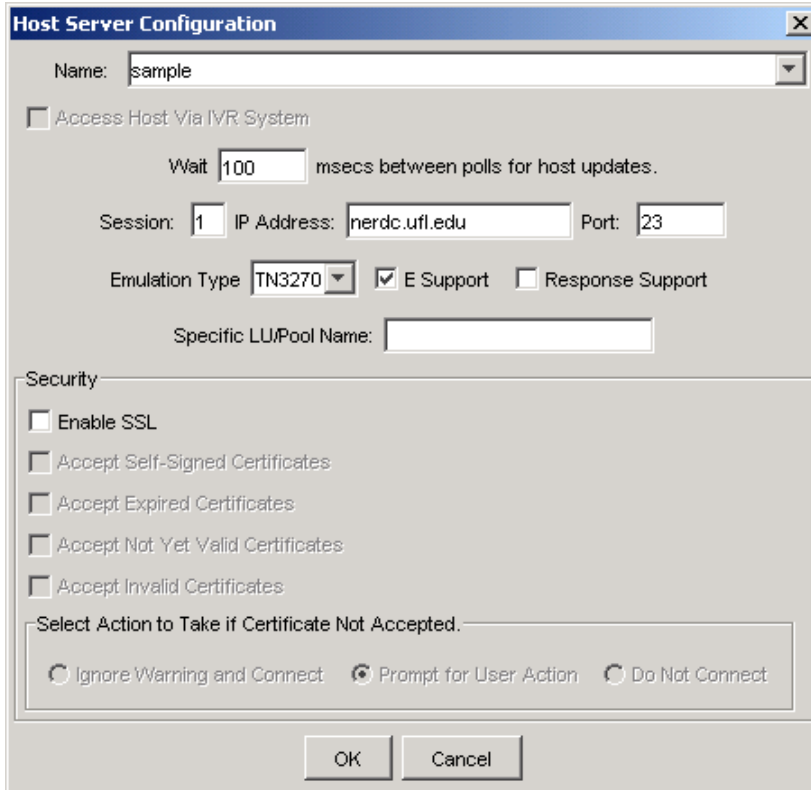
1. Click *Validate Transactions* to open the Validator.



2. On the left, the available transactions are listed.
 - a. Highlight “login” and click *add*.
 - b. Highlight “getlist” and click *add*.
 - c. Highlight “getlist_park” and click *add*.
 - d. Highlight “logout” and click *add*.



3. Click **Run Now**, and the Host Server Configuration window will be launched.



The image shows a 'Host Server Configuration' dialog box. At the top, the title bar reads 'Host Server Configuration' with a close button. Below the title bar, there is a 'Name:' dropdown menu with 'sample' selected. A checkbox labeled 'Access Host Via IVR System' is unchecked. Below this, a 'Wait' field contains '100' with the text 'msecs between polls for host updates.' To the right of the wait field are three input fields: 'Session:' with '1', 'IP Address:' with 'nerdc.ufl.edu', and 'Port:' with '23'. Below these is an 'Emulation Type' dropdown menu with 'TN3270' selected, followed by two checkboxes: 'E Support' (checked) and 'Response Support' (unchecked). A 'Specific LU/Pool Name:' text box is empty. A 'Security' section is enclosed in a box and contains five unchecked checkboxes: 'Enable SSL', 'Accept Self-Signed Certificates', 'Accept Expired Certificates', 'Accept Not Yet Valid Certificates', and 'Accept Invalid Certificates'. Below these is a label 'Select Action to Take if Certificate Not Accepted.' followed by three radio buttons: 'Ignore Warning and Connect' (unselected), 'Prompt for User Action' (selected), and 'Do Not Connect' (unselected). At the bottom of the dialog are 'OK' and 'Cancel' buttons.

4. Select “sample” from the drop down list, modify IP Address to be “nermvs.nerdc.ufl.edu” and click **OK**.
5. You will now see the transactions being run in sequence in the **Validation Window**.

