

Inbound Refinery Installation Guide
10g Release 3 (10.1.3.3.0)

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Inbound Refinery Installation Guide, 10g Release 3 (10.1.3.3.0)
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INTRODUCTION

OVERVIEW

This section contains the following topics:

- ❖ [About Inbound Refinery](#) (page 1-1)
- ❖ [About This Guide](#) (page 1-4)
- ❖ [Conventions](#) (page 1-4)
- ❖ [Inbound Refinery Documentation](#) (page 1-5)

ABOUT INBOUND REFINERY

Inbound Refinery version 10gR3 is a conversion server that manages file conversions and provides thumbnailing functionality. Inbound Refinery can be used for the following when running on either a Windows or a UNIX server:

- ❖ To create thumbnails of files using Outside In Image Export. Thumbnails are small preview images of content.
- ❖ To convert files to multi-page TIFF files using Outside In Image Export, enabling users to view the files through standard web browsers with a TIFF viewer plugin.
- ❖ To set up custom conversions and create custom conversion engines.



Note: For more information about file formats that can be converted by Inbound Refinery using OutSide In Image Export, refer to the *Inbound Refinery Administration Guide*.

In addition, the following conversion add-ons are available for use with Inbound Refinery:

- ❖ **PDF Converter**—Converts files to PDF (Portable Document Format), enabling users to view the files through standard web browsers with a PDF reader plugin (such as Adobe Acrobat Reader). There are three options for converting files to PDF:
 - *Convert to PDF using third-party applications*—When running on Windows, PDF Converter can use several third-party applications to create PDF files of content items. In most cases, a third-party application that can open and print the file is used to print the file to PostScript, and then the PostScript file is converted to PDF using the configured PostScript distiller engine. In some cases, PDF Converter can use a third-party application to convert a file directly to PDF. When using this option, PDF Converter requires a PostScript distiller engine, a PostScript printer, and the third-party applications used during the conversion.
 - *Convert to PDF using OpenOffice*—When running on either Windows or UNIX, PDF Converter can use OpenOffice to convert some file types directly to PDF. When using this option, PDF Converter requires only OpenOffice.
 - *Convert to PDF using Outside In*—PDF Converter includes Outside In X, which can be used on Windows to create PDF files of some content items. Outside In X is used to print the files to PostScript, and then the PostScript files are converted to PDF using the configured PostScript distiller engine. When using this option, PDF Converter requires only a PostScript distiller engine.



Important: Third-party applications used in conversions, a PostScript distiller engine, and a PostScript printer are not provided with PDF Converter. You must obtain all third-party applications required for the conversions you want to perform, as well as a PostScript distiller engine and a PostScript printer of your choice.



Note: For more information about file formats that can be converted by PDF Converter, refer to the *PDF Converter Installation and Administration Guide*.

❖ **Tiff Converter**—Enables the following functionality specific to TIFF (Tagged Image File Format) files:

- Creation of a managed PDF file from a single or multiple-page TIFF file.
- Creation of a managed PDF file from multiple TIFF files that have been compressed into a single ZIP file.
- OCR (Optical Character Recognition) during TIFF to PDF conversion. This enables indexing of the text within checked-in TIFF files, so that users can perform full-text searches of these files.

Tiff Converter is supported on Windows only.



Important: Tiff Converter requires CVISION CVista PdfCompressor to perform TIFF to PDF conversion with OCR. PdfCompressor is not provided with Tiff Converter. You must obtain PdfCompressor from CVISION. For more information, refer to the *Tiff Converter Installation and Administration Guide*.

❖ **XML Converter**—Converts files to XML (eXtensible Markup Language) files using Outside In XML Export, Search Export, and either the FlexionDoc or SearchML schema.



Note: For more information about file formats that can be converted by XML Converter, refer to the *XML Converter Installation and Administration Guide*.

❖ **Digital Asset Manager**—Enables you to define and provide images and videos in specified formats and sizes for download by the people in your organization who need them. This helps your organization maintain consistent standards for branding and digital content use.

Digital Asset Manager creates multiple formats of digital assets automatically when an image or video is checked into Content Server, and lists the formats under one content ID. This ensures that the asset, such as a corporate logo or promotional video, maintains a standard size and quality in the multiple formats required by your organization, while providing the content management and workflow features of Content Server. For people in your organization who need to find and use digital assets, Digital Asset Manager gives them the confidence that they are using the approved asset and format for their needs. For example, one person can bundle and download images of the logo for use on a web-site, and another can download and bundle images of the same logo for use in office presentations or print collateral, all from a single digital asset checked into Content Server.

Digital assets are valuable electronic images and videos to be made available within your organization in multiple output formats. Each output format is called a rendition.

The quantity and type of renditions are defined by the system administrator in rendition sets. A user selects a rendition set used to create renditions of a digital asset at the time the asset is checked into Content Server.



Note: For more information about file formats that can be converted by Digital Asset Manager, refer to the *Digital Asset Manager Installation and Administration Guide*.

ABOUT THIS GUIDE

This installation guide provides all information required to install Inbound Refinery version 10gR3 on a computer running either Microsoft Windows or UNIX. For details on supported operating systems, see [Software Requirements](#) (page 2-2).

The information contained in this document is subject to change as the product technology evolves and as hardware, operating systems, and third-party software are created and modified.



Important: Before proceeding with the installation of this software, make sure that you read the release note that is shipped with the software. It contains up-to-the-minute installation issues and considerations.

CONVENTIONS

The following conventions are used throughout this guide:

- ❖ Forward slashes (/) are used to separate parts of an Internet address. For example, <http://www.google.com/maps>. A forward slash might or might not appear at the end of an Internet address.
- ❖ Backward slashes (\) are used to separate the levels in a path to a Windows server, directory, or file. For example, C:\ibr\refinery\. A backward slash will always appear after the end of a Windows server, directory, or file path.
- ❖ Forward slashes (/) are also used to separate the levels in a path to a UNIX server, directory, or file. For example, /usr/ibr/refinery.
- ❖ File names and file paths within text are indicated by the following convention: `<filename>` file in the `<path_to_directory>` directory.
- ❖ The notation `<refinery_install_dir>` is used to refer to the location of the main Inbound Refinery installation directory.

- ❖ The notation `<content_server_install_dir>` is used to refer to the location of the main Content Server installation directory.
- ❖ Notes, technical tips, important notices, and cautions use these conventions:

Symbols	Description
	This is a note. It is used to bring special attention to information.
	This is a technical tip. It is used to identify information that can be used to make your tasks easier.
	This is an important notice. It is used to identify a required step or required information.
	This is a caution. It is used to identify information that might cause loss of data or serious system problems.

INBOUND REFINERY DOCUMENTATION

Inbound Refinery comes with a comprehensive online Help system and a full set of PDF documentation.

On-Line Help System

Inbound Refinery Help can be accessed from the Inbound Refinery administration interface or from the file system on the refinery computer:

- ❖ To view Help from the Inbound Refinery administration interface, click on a Help link.
- ❖ To start the Refinery Products Help system from the refinery computer file system, open the `wh_start.htm` file located in the following directory:

Windows—`<refinery_install_dir>\weblayout\help\`

UNIX—`<refinery_install_dir>/weblayout/help`



Note: The Welcome link in the online Help system table of contents provides useful information on using the Help system.

PDF Documentation

The Inbound Refinery documentation is also available as a set of PDF files. All of the PDF files are included with the Inbound Refinery software installation files. PDF files of guides are also installed along with the Inbound Refinery software:

- ❖ To view the PDF version of a guide from the Refinery Products Help system, click the PDF icon in the upper right-hand corner of any help page.
- ❖ To view the PDF files from the refinery computer file system, go to the following directory:

Windows—*<refinery_install_dir>\weblayout\help\documentation*

UNIX—*<refinery_install_dir>/weblayout/help/documentation*

PRE-INSTALLATION TASKS AND CONSIDERATIONS

OVERVIEW

The following tasks and considerations need to be taken into account before installing Inbound Refinery:

- ❖ [Hardware Requirements](#) (page 2-2)
- ❖ [Software Requirements](#) (page 2-2)
- ❖ [Considerations for Installing Inbound Refinery on Windows or UNIX](#) (page 2-13)
- ❖ [Preparing the Inbound Refinery Environment](#) (page 2-14)
- ❖ [Overview of Inbound Refinery Installation and Setup](#) (page 2-18)

HARDWARE REQUIREMENTS

The target computer for Inbound Refinery 10gR3 should meet the following hardware requirements:

- ❖ **Windows:** Industry-standard PC with Intel, AMD, or x86-compatible processor
- ❖ **Sun Solaris:** Sun Microsystem SPARC
- ❖ **Linux Red Hat:** x86-based PC
- ❖ **Linux SuSe:** x86-based PC



Important: Inbound Refinery will run on 64-bit hardware as long as your operating system provides a fully capable 32-bit mode.

SOFTWARE REQUIREMENTS

This section covers the following topics:

- ❖ [Operating Systems](#) (page 2-3)
- ❖ [Java Virtual Machine \(JVM\)](#) (page 2-6)
- ❖ [Web Servers](#) (page 2-7)
- ❖ [Web Browsers](#) (page 2-10)
- ❖ [Content Server](#) (page 2-12)
- ❖ [X Server, Motif, and LessTif](#) (page 2-12)



Important: Due to the technical nature of operating systems, web servers, and browsers, Oracle, Inc. cannot warrant compatibility with all versions and features of third-party products.

Operating Systems

This section covers the following topics:

- ❖ [Supported Operating Systems](#) (page 2-3)
- ❖ [Considerations for All Operating Systems](#) (page 2-4)
- ❖ [Considerations for Windows](#) (page 2-4)
- ❖ [Consideration for UNIX](#) (page 2-5)

Supported Operating Systems

Inbound Refinery 10gR3 can be installed on any of the following operating systems:



Note: Only English versions of the following operating systems are supported.

Windows

- ❖ Windows 2000 Server with Service Pack 4 (32-bit only, on x86)
- ❖ Windows Server 2003, Standard Edition, with Service Pack 1 (32-bit only, on x86)
- ❖ Windows Server 2003, Enterprise Edition, with Service Pack 1 (32-bit only, on x86)
- ❖ Windows Server 2003 R2, Standard Edition (32-bit only, on x86)
- ❖ Windows Server 2003 R2, Enterprise Edition (32-bit only, on x86)

UNIX

- ❖ Solaris 9 or 10 (on Sun SPARC)
- ❖ Red Hat Enterprise Linux 3 or 4 (AS or ES, on x86)
- ❖ SuSe Linux Enterprise Server 9 or 10 (on x86)



Important: Your operating system must provide a fully capable 32-bit mode, as Inbound Refinery is built with 32-bit executables and requires a 32-bit JVM.

Considerations for All Operating Systems

Please note the following considerations for all supported operating systems:

- ❑ Unless otherwise noted, “Windows” is used in this guide to refer to all supported versions of the Microsoft Windows operating system, and “UNIX” is used to refer to all supported versions of the UNIX operating system.
- ❑ It is strongly recommended that you install Inbound Refinery from the distribution media that was provided to you. If you downloaded an ISO image, either burn a CD or mount the ISO image to install.
- ❑ For the latest information on the exact versions supported and late-breaking installation considerations, refer to the *DAM and Conversion Products Release Notes*.

Considerations for Windows

Please note the following considerations when installing Inbound Refinery on Windows:

- ❑ Make sure that your Windows environment is running at the required Service Pack level and that the latest critical patches have been applied. If this is not the case, make sure that you update Windows before proceeding with the installation of Inbound Refinery. Service Packs for Microsoft Windows can be downloaded from Microsoft’s Internet site (<http://www.microsoft.com>). Alternatively, you can also contact your local Microsoft representative.
- ❑ You need local administrator rights for the computer on which Inbound Refinery will be installed.
- ❑ If you are planning to install Inbound Refinery from a shared network location rather than the CD drive, make sure that you assign a drive letter to that network location and then install the software using the drive letter (for example, *V:\InboundRefinery\win32\setup.exe*). Otherwise, the installation will fail.
- ❑ You may use Terminal Services to install Inbound Refinery.
- ❑ Make sure that you do not copy the installation files to a directory that contains any spaces (for example, *C:\IBR 10gR3*) and start the installation from there. If you do, the installation process might not complete successfully and might hang under certain circumstances.

- ❑ It is recommended that you use local drives for the native and web-viewable file repositories (the “Vault” and “Web Layout,” respectively). If you do need to use shared network locations, you should preferably use UNC paths (\\Location) to refer to the network locations rather than mapping them and using drive letters (X:\Location). This is because mapped drives are disconnected when you log out of the server unless you use another piece of software to have the drives mapped as a service. Make sure that Inbound Refinery runs as a Microsoft domain user with access privileges to the UNC locations.
- ❑ Make sure that you exit all Windows programs before installing Inbound Refinery.

Consideration for UNIX

Please note the following considerations when installing Inbound Refinery on UNIX:

- ❑ Make sure that your UNIX operating system has been updated with the latest official patches.
- ❑ A complete Solaris install is required. An end-user or developer install is not sufficient.
- ❑ You can use the following Solaris kernel configuration entries to improve file upload performance from Internet Explorer to a refinery running on Solaris:


```
ndd -set /dev/tcp tcp_deferred_acks_max 0
nnd -set /dev/tcp tcp_deferred_ack_interval 10
```
- ❑ If you install Inbound Refinery on Linux, make sure that the C++ backward compatibility package is installed on the server (and also on the web server if it is running on a separate machine). Otherwise, errors might be reported during Inbound Refinery installation or while starting the web server (for example, NativeOsUtils exceptions or failure to open a shared object file). Typically the package is called *compat-<version_info>.rpm* or *compat-libstc++-<version_info>.rpm*, and usually it is included on the Linux distribution media.

Java Virtual Machine (JVM)

Inbound Refinery 10gR3 requires a Java Virtual Machine (JVM) to execute server-side Java programs on the web server. For new installations on either Windows or UNIX, by default Sun JVM 1.5.0_07 is installed with Inbound Refinery unless you indicate that you want to use a different JVM. For updates, you might be able to use a JVM already on the computer (depending on the current configuration).

Please note the following considerations for JVMs:

- ❑ Only the JVMs provided with Inbound Refinery have been tested. If you do not want to use the default JVM for Inbound Refinery, use caution. Make sure that you install a JDK 1.4.2 or 1.5-compliant Java Virtual Machine (JVM) on your Inbound Refinery system before installing Inbound Refinery. Inbound Refinery might not function properly with non-tested JVMs.
- ❑ Inbound Refinery requires a 32-bit JVM.
- ❑ If you have a JVM on your computer other than the one required for Inbound Refinery, you can install the required JVM safely. Multiple JVMs can co-exist on the same computer.
- ❑ The default JVM for Linux on x86-based computers is the Sun JVM 1.5. It is recommended that you use this JVM and avoid the IBM JVM (because of performance issues). You can use the IBM JVM if you are willing to tolerate the performance issues, but you must then turn off optimization by adding the following line to the *intradoc.cfg* configuration file located in the *<refinery_install_dir>/bin* directory:

```
JVMFLAGS=-Djava.compiler=off
```

Do not forget to restart Inbound Refinery after making this change.
- ❑ For Solaris, you must install the correct Solaris patches for the 1.5 JVM.

Web Servers

This section covers the following topics:

- ❖ [Supported Web Servers](#) (page 2-7)
- ❖ [Considerations for All Web Servers](#) (page 2-7)
- ❖ [Considerations for Microsoft Internet Information Systems \(IIS\)](#) (page 2-8)
- ❖ [Considerations for Sun Java System Web Server](#) (page 2-8)
- ❖ [Considerations for Apache](#) (page 2-8)

Supported Web Servers

Inbound Refinery 10gR3 requires a web server. The following web servers are supported:

- ❖ Microsoft Internet Information Services (IIS) 5.0 or 6.0
- ❖ Sun Java System Web Server 6.1 (with the latest Service Pack)
- ❖ Apache 2.0.x (2.0.55 or higher) or 2.2.x

Considerations for All Web Servers

Please note the following considerations for all web servers:

- If you are using a non-English operating system, you must make sure that you use the internationalized version of the web server software.
- The installation procedures in this document assume that you install Inbound Refinery on the same physical computer as the web server. While it is possible to distribute Inbound Refinery and web server among different physical systems (Disassociated Installation), this configuration is not supported for Inbound Refinery 10gR3.
- Make sure the web server software is installed and running correctly before installing Inbound Refinery.
- When installing the web server, record the following information, as you might be asked for it during the installation of Inbound Refinery:
 - Full path (not required for IIS)
 - Web server root
 - Admin user name and password

- ❑ During the installation of Inbound Refinery, you might be asked if you want to overwrite DLLs (Windows) or files (UNIX). If that is the case, choose to overwrite them.
- ❑ Certain third-party products designed to enhance application security in your web server might disable functionality in Inbound Refinery. In particular, bear in mind that Inbound Refinery requires lengthy CGI parameters (potentially up to 20,000 characters) and arbitrary path suffixes to the Inbound Refinery CGI URL path.
- ❑ For the latest information on the exact versions supported and the most current installation considerations, refer to the *DAM and Conversion Products Release Notes*.

Considerations for Microsoft Internet Information Systems (IIS)

There are no special considerations for Microsoft IIS currently.

Considerations for Sun Java System Web Server

Please note the following considerations for Sun web servers:

- ❑ When installing on UNIX, install the web server using the root user.
- ❑ Make sure that the following settings are made:
 - Set the server user to Inbound Refinery's user login.
 - Set the bind-to address to the IP address of the web server.
- ❑ Should you choose to install multiple refineries on the same computer, you will need to create a separate Sun web server instance for each refinery. If you use a different port number than 80 for your web server instance, you will need to include that port number as part of the HTTP address of the web server (for example, "server:81").

Considerations for Apache

Please note the following considerations for Apache:

- ❑ Apache 1.x is not supported for Inbound Refinery 10gR3.
- ❑ When installing on UNIX, enable support for dynamically loadable modules. Specifically, configure the build of Apache server for DSO modularization.
- ❑ Configure Apache configuration switches.

- ❑ For Apache 2.x to function properly in international environments, you might need to modify Apache's `AddDefaultCharset` configuration setting. Some browsers (particularly, Mozilla-based ones) might not show an HTML page in the character set specified in the page. This is because Apache has a configuration entry which augments the HTTP Content-Type return header to specify the character set of every page that Apache returns, and some browsers will trust the header instead of the character set as specified in the page. This can be a particular problem for the Inbound Refinery help pages, which use UTF-8 as their standard internal character set encoding. This issue tends to show up only in non-English sites because the default character set is `iso-8859-1`.

To work around this issue, use the Apache configuration entry `AddDefaultCharset` to make it agree with the character set as specified in the web pages. This value can be determined by looking for the value `%pagecharset%` in the HTML tag:

```
<meta http-equiv="Content-Type" content="text/html;
charset=%pagecharset%">
```

If the website is returning pages in more than one character set, then set `AddDefaultCharset` to the value "Off" or use the `Location` or `Directory` directives to scope its usage. Please note that the refinery might be using different character sets depending on the source of the content in the pages. The following is an example configuration for a Japanese refinery that is using the native SJIS character set:

```
<Location /idcm1>
AddDefaultCharset shift_jis
</Location>

<Location /idcm1/help>
AddDefaultCharset utf-8
</Location>
```

Note that the help pages have to be separately scoped to deliver UTF-8 encoded pages.

Web Browsers

This section covers the following topics:

- ❖ [General Browser Considerations](#) (page 2-10)
- ❖ [Recommended Browsers on Windows Clients](#) (page 2-10)
- ❖ [Recommended Browsers on UNIX Clients](#) (page 2-11)
- ❖ [Recommended Browsers on Mac Clients](#) (page 2-11)

General Browser Considerations

The following considerations apply to all web browsers on all client platforms:

- Browsers or versions other than the ones specifically mentioned in this section might also work, but there might be some issues, which typically are associated with supported layouts and advanced interface features such as option lists based on views. For example, some browser versions might only support the Classic layout, not the Trays or Top Menus layout. These browsers typically also fail to display the options of an option list based on a view.
- For the latest information on the exact versions supported and the most current browser considerations, refer to the *DAM and Conversion Products Release Notes*.

Recommended Browsers on Windows Clients

The following web browsers are recommended for use with Inbound Refinery 10gR3 for client computers running on the Microsoft Windows operating system:

- ❖ Microsoft Internet Explorer 7
- ❖ Firefox 2

Please note the following considerations for web browsers on Windows clients:

- Make sure that Internet Explorer uses version 5.5 or higher of Microsoft's JScript engine. Otherwise JavaScript rendering errors (for example, "Object Not Found") might be reported. Please note that Windows XP SP2 uses JScript engine 5.6.

- ❑ If you access a refinery running on Windows Server 2003 using Internet Explorer 7 on the same computer as the refinery, you will see many security prompts before you can actually access the refinery. This is because of security features that are built into Windows Server 2003. To turn off these prompts, remove the Internet Explorer Enhanced Security Configuration (using Control Panel—Add or Remove Programs—Add/Remove Windows Components). Alternatively, you can also access the refinery using a different web browser (for example, Firefox) or using Internet Explorer 7 from a different computer than the refinery.

Recommended Browsers on UNIX Clients

The following web browsers are recommended for use with Inbound Refinery 10gR3 for client computers running on a UNIX-based operating system:

- ❖ Firefox 2

There are no special considerations for web browsers on UNIX clients currently.

Recommended Browsers on Mac Clients

The following web browsers are recommended for use with Inbound Refinery 10gR3 for client computers running on a UNIX-based operating system:

- ❖ Firefox 2
- ❖ Safari 2.04

Please note the following considerations for web browsers on Mac clients:

- ❑ See knowledgebase article p88005152 for a number of considerations for using Mac clients.

Content Server

Inbound Refinery can serve as a provider for one or multiple Content Server instances. Inbound Refinery version 10gR3 requires Content Server version 10gR3. It might be possible to use Inbound Refinery with other versions of Content Server, however, Oracle, Inc. cannot guarantee that Inbound Refinery version 10gR3 will function correctly when it is not used with a Content Server version 10gR3 instance.

X Server, Motif, and LessTif

When running Inbound Refinery on UNIX and creating multi-page TIFF files or thumbnails, by default Outside In Image Export uses its internal graphics code to render fonts and graphics. Therefore, X Server, Motif, and LessTif are not required. The system only needs to be able to locate usable fonts.

After installation you can configure Inbound Refinery so that Image Export uses the operating system's native graphics subsystem to render fonts and graphics instead of its internal graphics code. If you choose to do so, X Server, Motif, and LessTif are required.

For more information about configuring rendering options on UNIX, refer to the *Inbound Refinery Administration Guide*.

CONSIDERATIONS FOR INSTALLING INBOUND REFINERY ON WINDOWS OR UNIX

Inbound Refinery 10gR3 can be installed on either Windows or UNIX. Inbound Refinery itself (i.e., without any conversion add-ons installed) provides the same functionality when installed on Windows or UNIX. The functionality of the conversion add-ons that are available for use with Inbound Refinery 10gR3 varies by operating system, with some conversion add-ons being supported on Windows only. When determining whether to install Inbound Refinery on Windows or UNIX, consider the functionality that is supported on each operating system:

Product	Functionality	Windows	UNIX
Inbound Refinery	Create thumbnails using Outside In Image Export	X	X
	Convert files to multi-page Tiff files using Outside In Image Export	X	X
	Create custom conversions	X	X
PDF Converter	Convert files to PDF using OpenOffice	X	X
	Convert files to PDF using third-party applications and PostScript to PDF distillation	X	
	Convert files to PDF using Outside In X and PostScript to PDF distillation	X	
Tiff Converter	Convert single or multi-page TIFF files to a single PDF file using CVISION CVista PdfCompressor	X	
	Convert multiple TIFF files that have been compressed into a single ZIP file into a single PDF file using CVISION CVista PdfCompressor	X	
	Perform OCR during TIFF to PDF conversion (for text indexing) using CVISION CVista PdfCompressor	X	
XML Converter	Convert files to XML using Outside In XML Export, Search Export, and either the FlexionDoc or SearchML schema.	X	X

PREPARING THE INBOUND REFINERY ENVIRONMENT

Make sure that you read, understand and comply with each of the following tasks and considerations before installing Inbound Refinery:

- Inbound Refinery 10gR3 is installed with an English-language user interface. It does not offer any localized (i.e., non-English) user interfaces.
- Make sure that the target computer for Inbound Refinery meets all hardware requirements. For details, see [Hardware Requirements](#) (page 2-2).
- Make sure that a supported operating system, including all required service packs and updates, is installed and running on the target computer for Inbound Refinery. For details, see [Operating Systems](#) (page 2-3).
- Make sure that you have read and understand all Java Virtual Machine (JVM) considerations. For details, see [Java Virtual Machine \(JVM\)](#) (page 2-6).
- When installing Inbound Refinery on Windows, make sure that you exit all Windows programs before installing Inbound Refinery.
- When installing Inbound Refinery on Windows, active virus scanning of some Inbound Refinery directories can cause conversions to fail. For details, refer to the *Inbound Refinery Administration Guide*.
- When installing Inbound Refinery on Windows, the same user should be used to install Inbound Refinery and its conversion add-ons, install all required third-party applications, and run Inbound Refinery.

Windows user name: _____

Windows password: _____



Important: If you choose to run Inbound Refinery as a service, this user should be used to run (log on as) the service. Therefore, this user must be granted the right to log on as a Windows service. If you want to create the refinery service during installation, you must grant the user the right to log on as a service before installation. If you do not, the installation will not complete successfully.

- ❑ When installing Inbound Refinery on UNIX, it is recommended that the UNIX login for Inbound Refinery is the same as the Server User login for the web servers. (The minimum requirement is that they are at least in the same group.) By making sure that these logins are the same, you prevent users from accessing secure documents from the operating system.

UNIX user name: _____

UNIX password: _____

UNIX group: _____



Note: Avoid UNIX user names that have more than eight characters.

Create an Inbound Refinery user profile for the UNIX login by completing the following steps:

1. Set the umask to create all files as mode 775:

```
umask 002
```

2. Set a useful path:

```
set path=(/bin /usr/bin sbin /usr/sbin /usr/ccs/bin
/usr/local/bin /usr/openwin/bin /usr/dt/bin)
```

(Please note that this is all on a single line.)

The home directory for the Inbound Refinery UNIX login is the default location presented during the Inbound Refinery installation.

- ❑ The standard installation procedure as described in the following sections uses the same UNIX user ID for all content servers and refineries on the same computer. This configuration enables a single Admin Server to control the starting, stopping, and configuration of all content servers and refineries in a straightforward manner.

However, some system managers might want to use a different user ID for each content server and refinery for reasons that are external to the product, such as distinct disk quotas for each.

In this case, to ensure that the installer can configure the Admin Server for the a new refinery it is recommended that each refinery be installed with the same user ID as the user that installed the Admin Server. After installation is complete, the UNIX superuser can then `chown(1)` the entire installation to the user ID that the refinery should use when running. To enable Admin Server to start, stop, or reconfigure refineries running under different user IDs, the file `admin/bin/UnixProcCtrl` must be owned by the UNIX superuser and set to `setuid`.

For example:

```
% cd [Admin_Server_Install_Dir]/admin/bin
% su
Password: [Superuser_Password]
# chown 0 UnixProcCtrl
# chmod 4550 UnixProcCtrl
# exit
%
```

- Make sure the web server software is installed and running correctly before installing Inbound Refinery, and record its full path (not required for IIS).

Web server path: _____

- Identify and record the web server root. You might be asked for it during the installation of Inbound Refinery.

Web server root: _____

- Identify the network IP address (for example, 61.45.14.104) of the Inbound Refinery computer (the localhost IP address 127.0.0.1 is not sufficient) and each computer running a content server for which the refinery will be a provider. To ensure that the refinery can communicate properly, you should add these addresses to the IP security filter for the refinery. You can also update the refinery's IP security filter after installation.

Refinery computer IP address: _____

Content server computer IP addresses: _____

- Identify where you want the native file repository (the "Vault") and the web-viewable file repository (the "Web Layout") to be located. You will be asked for the path name of each of these locations during installation of Inbound Refinery. If these directories are on a system separate from the rest of Inbound Refinery, make sure that the drives are accessible and have adequate permissions.



Note: It is recommended that you use local drives for the native and web-viewable file repositories. If you do need to use shared network locations, you should preferably use UNC paths (\\Location) to refer to the network locations rather than mapping them and using drive letters (X:\Location). This is because mapped drives are disconnected when you log out of the server unless you use another piece of software to have the drives mapped as a service. Make sure that Inbound Refinery runs as a Microsoft domain user with access privileges to the UNC locations.

Native file repository (“Vault”): _____

Web-viewable file repository (“Web Layout”): _____

- Identify the refinery port number(s). You will be asked for them during the installation of Inbound Refinery.

If you plan to use multiple refinery instances on the same computer, make sure that you use different port numbers for each instance.

Refinery port number(s): _____

- Identify the admin server port number(s). You will be asked for them during the installation of Inbound Refinery.

If you plan to use multiple admin servers on the same computer, make sure that you use different port numbers for each admin server instance.

Admin server port number(s): _____

- If you are installing Inbound Refinery on a Windows computer and it will be a provider to a content server on a UNIX computer, and you anticipate heavy batch-loading or a lot of check-in activity, Oracle recommends using Samba for file services. During testing, this has proved to be very reliable. Samba can be downloaded from the Internet at <http://us2.samba.org/samba/>.

OVERVIEW OF INBOUND REFINERY INSTALLATION AND SETUP

The following is an overview of the basic steps required to install a 10gR3 refinery and begin converting files for a content server:

1. Install a refinery. For details, see [Chapter 3 \(Installing Inbound Refinery\)](#).
 - ❖ During installation you can choose to add the refinery as a provider to a content server on the same computer, with that content server managing the refinery's authentication (the content server will own the refinery's user base).
 - ❖ You can also add the refinery as a provider to content servers on the same or separate computers after installation. For more information, refer to the *Inbound Refinery Administration Guide*.
 - ❖ During installation you can install an Admin Server for the refinery, or you can add the refinery to an existing Admin Server on the same computer.
 - ❖ You can also add the refinery to an existing Admin Server after installation. For more information, refer to the *Inbound Refinery Administration Guide*.
2. Check the installation log file. For details, see [Installation Log File](#) (page 4-2).
3. Install the InboundRefinerySupport component on each content server for which the refinery will be a provider. For details, see [Installing the InboundRefinerySupport Component on Content Servers](#) (page 4-2).
4. Depending on the web server and installation choices selected during the refinery installation, you might need to perform a number of tasks to set up and configure the web server for use with a refinery. For details, see [Configuring Your Web Server](#) (page 4-5).
5. Periodically, you might need or want to update an existing 10gR3 refinery to a newer version 10gR3 build. For details, see [Chapter 5 \(Updating an Existing Inbound Refinery\)](#).
6. After completing the refinery installation, the following setup is required:
 - ❖ If you did not add the refinery as a provider to a content server during installation, you need to do so after installation. You can also add the refinery as a provider to additional content servers.
 - ❖ You need to configure each content server to send conversion jobs to the refinery.
 - ❖ You need to configure the refinery to accept conversion jobs and configure your conversion settings.

For more information, refer to the *Inbound Refinery Administration Guide*.

INSTALLING INBOUND REFINERY

OVERVIEW

The installation procedure for Inbound Refinery depends on the preferred installation method:

- ❖ [Command-Line Installation](#) (page 3-2)
With this installation method, Inbound Refinery is installed using a text-based, command-line interface.
- ❖ [Unattended Installation](#) (page 3-10)
With this installation method, Inbound Refinery is installed using script files, which are executed by the installer without any intervention from the user.



Important: The procedures in this section apply only to new installations of Inbound Refinery 10gR3. For details on updating an Inbound Refinery 10gR3 instance, see [Chapter 5 \(Updating an Existing Inbound Refinery\)](#).

COMMAND-LINE INSTALLATION

With this installation method, Inbound Refinery is installed using a text-based, command-line interface. Please note the following considerations:

- ❖ The installation procedure contained in this document assumes that you install Inbound Refinery on the same system as the web server.
- ❖ Throughout the installation procedure described below, you can press [Enter] to accept the default, which is indicated either by square brackets ([]) or an asterisk (*).
- ❖ Even when installing on Windows, make sure that you use forward slashes (/) whenever you need to specify a path (for example *c:/ucm/ref1/*).
- ❖ Every value entered for each refinery installation must be unique.
- ❖ You can abort the installation procedure at any point before the installation starts by pressing [Ctrl+C].

To install Inbound Refinery using the command-line interface, complete the following steps:

1. Log in to the Inbound Refinery computer. Be mindful of the user account that you use to install and run Inbound Refinery. For details, see [Preparing the Inbound Refinery Environment](#) (page 2-14).
2. If you are installing the refinery on Windows, close all other Windows programs.
3. Open a command prompt or shell window and navigate to the Inbound Refinery installation directory on the Inbound Refinery distribution media.
4. Launch the installer:
 - ❖ **Windows:** Enter `Installer` and press [Enter].
 - ❖ **UNIX:** Enter `sh ./setup.sh` and press [Enter].



Note: You can specify some command-line parameters for the installer to override a number of default installation settings. For example, you can turn off the initial system checking that takes place by default. For further details refer to [Overriding Script File Entries](#) (page A-13).

5. You are prompted to choose the language of the installation procedure. Select a language from the list, and press [Enter].
6. A menu of installation options is displayed. Press '1' and [Enter] to install a new Inbound Refinery.

7. You are prompted to enter the full path to the target installation directory for the new refinery. Specify a valid installation directory path or accept the default, and press [Enter] when you are done. If you specify a directory that does not yet exist, you are asked whether this directory should be created. Press '1' (or [Enter]) to confirm.



Important: The directory path should not contain any spaces.

8. You are prompted to specify the Java Virtual Machine (JVM) that will be used with the new refinery. If you press '1' or [Enter], the default JVM is installed. If you press '2', you can specify a custom JVM by typing the full pathname to the JVM executable and pressing [Enter]. For more information about default and custom JVMs, see [Java Virtual Machine \(JVM\)](#) (page 2-6).
9. You are prompted to specify the location of the native file repository (the “Vault”) for the new refinery. This is where Inbound Refinery temporarily stores native files for conversion. Specify a valid directory path or accept the default, and press [Enter] when you are done. If you specify a directory that does not yet exist, you are asked whether this directory should be created. Press '1' (or [Enter]) to confirm.



Important: The directory path should not contain any spaces.

10. You are prompted to specify the location of the web-viewable file repository (the “Web Layout”) for the new refinery. This is where Inbound Refinery stores static refinery web pages. Specify a valid directory path or accept the default, and press [Enter] when you are done. If you specify a directory that does not yet exist, you are asked whether this directory should be created. Press '1' (or [Enter]) to confirm.



Important: The directory path should not contain any spaces.

11. You are prompted to choose if the refinery should be configured as a provider to an existing local content server (on the same computer), with that content server managing the refinery’s authentication (the content server will own the refinery’s user base). If you choose to configure the refinery as a provider to a local content server, you are prompted to enter the path to the local content server (for example `c:/ucm/cs1/`). You can also add the refinery as a provider to content servers on the same or separate computers after installation. For more information, refer to the *Inbound Refinery Administration Guide*.

12. You are prompted to choose if an Admin Server should be installed and configured to manage the refinery, or if the refinery should be added to an existing admin server on the same computer. If you choose to configure an existing Admin Server to manage the refinery, you are prompted to enter the path to the Admin Server (for example `c:/ucm/cs1/admin/`). You can also add the refinery to an existing Admin Server after installation. For more information, refer to the *Inbound Refinery Administration Guide*.
13. You are prompted to specify the location of your web browser executable. This browser will be used to display the online help (if called on the same computer as the refinery). Specify the location path of your browser or accept the default (which the path to the default browser on your computer), and press [Enter].
14. You are prompted to specify the system locale for the refinery. The system locale defines how the refinery handles a number of language-specific issues such as date/time format, default time zone, and default interface. Select the locale from the list, and press [Enter].



Note: The system locale of a refinery can be changed at any time using the System Properties utility.

15. You are prompted to specify the time zone which the refinery will operate in. Accept the default (use the time zone setting of the operating system) or select a world region, and press [Enter]. If you select a world region, you are prompted to specify which time zone the refinery will operate in. Choose the time zone from the list, and press [Enter]. If the displayed list does not include your time zone, you can press 'm' for more choices.
16. You are prompted to enter the refinery port number. The default port is 5555. This port must be otherwise unused, and must be unique for each content server or refinery on the same computer. Specify the port number, or press [Enter] to accept the default. If you specify a port number that is already in use, you are prompted to enter the port number again.
17. You are prompted to specify the IP address security filter of the refinery. This filter is used to restrict access to the refinery. Only hosts with IP addresses matching the specified criteria are granted access to the refinery. The default is 127.0.0.1 (localhost), but you can add any number of valid IP addresses. You can specify multiple IP addresses separated by the pipe symbol (|), and you can use wildcards (* for zero or many characters, and ? for single characters).
Example: `127.0.0.1|10.10.1.10|62.43.163.*|62.43.161.12?`

Make sure the IP address security filter includes the network IP address of the content server computer for which the refinery will be performing conversions, even if the content server is the same physical computer. In this case, the localhost IP address (127.0.0.1) is not sufficient. Also make sure that the IP address security filter always includes the localhost IP address (127.0.0.1), in addition to any other IP addresses.



Note: You can modify the IP address security filter of the refinery after installation. For details, refer to the *Inbound Refinery Administration Guide*.

When you are done, press [Enter].

18. You are prompted to specify the URL prefix (web server relative root) of the refinery. Specify the web server relative root or accept the default, and press [Enter] when you are done. If you specify a URL prefix that is already in use by another instance, you are prompted to enter the URL prefix again.



Note: This URL prefix is used when generating HTML pages that refer to the contents of the weblayout directory within the installation. This prefix must be mapped in the web server to the physical location of the *weblayout* directory.

19. You are prompted to specify the web server HTTP address. Specify the HTTP address of your web server (e.g., *web.company.com*) or accept the default (which is the detected computer name), and press [Enter] when you are done.



Note: The address specified here will be used when generating HTML pages. For example, “web.company.com” could be used in your installation to refer to the URL *http://web.company.com/ref1*.



Important: If your web server is running on a port other than 80, you need to append a colon and the port number to the HTTP address (for example, *web.company.com:81*).

20. You are prompted to specify a name for the refinery. This name should be unique across the entire enterprise. Specify the name or accept the default, and press [Enter] when you are done.
21. You are prompted to specify a short label for the refinery (for example, *ref1*). This label is used on web pages to identify this instance. The maximum number of characters for the label is 12. Specify the label, and press [Enter] when you are done.
22. You are prompted to specify a long description for the refinery. Specify the description (for example, *Inbound Refinery refinery_1*), and press [Enter] when you are done.

23. You are prompted to specify the web server that will be used with the refinery. A list of supported web servers is provided. You can also choose to configure the web server manually. Select an option from the list and press [Enter] to continue.



Note: If you choose to configure the web server manually, refer to [Appendix B \(Setting Up Your Web Server Manually\)](#) for more information.

- a. If you select Microsoft IIS 5.0/6.0 as your web server and file handling caching is enabled, you are prompted to specify whether it should be disabled. This is recommended so that locked files on your website can be updated dynamically without conflict from the web server. Press '1' (yes) or '2' (no), and press [Enter] to continue.
- b. If you select Microsoft IIS 5.0/6.0 as your web server, you might be prompted to specify what security model should be used for IIS (if this has not been set):
 - **Standard security**—Set up standard security manually. User, role, and account information must be set up separately from Windows NT security.
 - **NTLM security**—*Choose this option only if Microsoft Internet Explorer is used in conjunction with IIS.*
User, role, and account information are mapped from Microsoft network security. This is beneficial for sites desiring a single source of user administration and for complex security models. For this option, the server on which you install the core components must be participating in a Microsoft network security domain. It cannot be a stand-alone server or just a server participating in a workgroup. This means that if there are no other Microsoft network servers, your server must be a primary domain controller.
 - **ADSI security**—Active Directory Services Interface (ADSI) is used to provide security.

Press '1' (standard), '2' (NTLM), or '3' (ADSI), and press [Enter] to continue.



Important: Oracle Inbound Refinery 10gR3 does not support NTLM on Microsoft Windows Server 2003. If you want centralized user administration, it is recommended that you use Active Directory Services Interface (ADSI).

- c. If you select Sun ONE as your web server, you are prompted to specify the full directory path for the Sun web server to use for the refinery. Enter the web server's full directory path, and press [Enter] to continue.



Note: The directory you specify must contain a subdirectory called *config* with the files *obj.conf* and *magnus.conf*. The installer will create new *obj.conf* and *magnus.conf* files in the *install* subdirectory of the installation directory. If possible, these files will be installed automatically. The original *obj.conf* and *magnus.conf* files will be renamed *install/obj.conf.orig* and *install/magnus.conf.orig*, respectively.

24. If you are installing an Admin Server on Windows, you are prompted to specify how the Administration Server service should be configured. You can choose to install the service and start it automatically, just install it (and start it manually), or not install it at all. Select an option and press [Enter] to continue.



Note: If you choose not to install the service, you will not be able to perform administrative tasks remotely using a web browser interface until you start the admin server.

If you select to install the Administration Server service, you receive prompts for the following:

a. If you want to configure the service to run as a specific user.

If you select yes, you are prompted to enter a username and password. It is recommended that you select yes and run the service as the same user used to install Inbound Refinery and its conversion add-ons and to install all required third-party applications.

Make sure that you use the proper syntax for the username:

Local username syntax: `.\[username]`

Domain username syntax: `[domain]\[username]`

If you select no, the service will be configured to run as Local System.



Important: If you choose to configure the service to run as a specific user (recommended), this user must be granted the right to log on as a Windows service. If you do not grant the user the right to log on as a service before installation, the installation will not complete successfully.

b. If the service should be configured to be dependent on another service. If you choose yes, you are prompted to enter the name of the service upon which the Administration Server service will be dependent.

25. If you are installing the refinery on Windows, you are prompted to specify how the refinery service should be configured. You can choose to install the service and start it automatically, just install it (and start it manually), or not install it at all. Select an option and press [Enter] to continue.



Note: If you choose not to install the service, you can only start the refinery as an application (from the Windows Start Menu or a command line).

If you select to install the refinery service, you receive prompts for the following:

- a. If you want to configure the service to run as a specific user.

If you select yes, you are prompted to enter a username and password. It is recommended that you select yes and run the service as the same user used to install Inbound Refinery and its conversion add-ons and to install all required third-party applications.

Make sure that you use the proper syntax for the username:

Local username syntax: `.\[username]`

Domain username syntax: `[domain]\[username]`

If you select no, the service will be configured to run as Local System.



Important: If you choose to configure the service to run as a specific user (recommended), this user must be granted the right to log on as a Windows service. If you do not grant the user the right to log on as a service before installation, the installation will not complete successfully.

- b. If the service should be configured to be dependent on another service. If you choose yes, you are prompted to enter the name of the service upon which the refinery service will be dependent.

26. If you are installing the refinery on Windows, you might be prompted to specify whether the 8.3 file name creation should be disabled (if this has not been set already). Press '1' (yes) or '2' (no), and press [Enter] to continue.



Caution: For systems dedicated to running Inbound Refinery, disable the 8.3 naming convention. All systems used for production purposes should be dedicated to running Inbound Refinery.

For systems not dedicated to running Inbound Refinery, do not disable the 8.3 naming convention option. This ensures that other products installed on this system which require the 8.3 naming convention function properly. Systems not dedicated to running Inbound Refinery could be demonstration or development systems.

27. The installer now performs a number of pre-installation checks. If there are any errors or warnings, they are reported. Review the installation settings, and then indicate whether the installation should proceed or abort, or whether you want to make changes to the configuration. You can also recheck the configuration. This enables you to correct any reported errors before proceeding. When you are ready, choose a menu option and press [Enter].
28. If you choose to proceed with the installation, all files are copied and the configuration settings made. During that process, a message line shows the percentage of what has been completed, as well as a brief description of the task currently being performed.
29. After installing Inbound Refinery, consider the following:
 - ❖ Several tasks and considerations should be taken into account after installing Inbound Refinery, including installing the InboundRefinerySupport component on each content server for which the refinery will be a provider (i.e., for which the refinery will perform conversion jobs).
For details, see [Chapter 4 \(Post-Installation Tasks and Considerations\)](#).



Important: If you chose to configure the refinery as a provider to an existing local content server, the InboundRefinerySupport component must be installed on the content server before you will be able to log into the refinery successfully.

- ❖ For more information on starting, setting up, and administering a refinery after it has been installed, refer to the *Inbound Refinery Administration Guide*.

UNATTENDED INSTALLATION

Inbound Refinery supports unattended installations. An unattended installation is basically a command-line installation that uses a specific script file as the parameter. This enables administrators to install and set up Inbound Refinery on multiple computers using the exact same installation settings, without any human intervention (other than starting the installation process).

This section covers the following topics:

- ❖ [Creating a Script File](#) (page 3-10)
- ❖ [Running an Unattended Installation](#) (page 3-11)

Creating a Script File

Before you can perform an unattended installation, you need to create a script file that contains all the required installation parameters. The easiest way to create this file is to go through a command-line installation of the Inbound Refinery software all the way to the final review step. Do not proceed at this point! Rather, abort the installation and go to the `<refinery_install_dir>/install` directory. The installer generated a script file that was going to be used to install the Inbound Refinery software. The generated script file is named `[date]-[type].txt`, where `[date]` is the current date and `[type]` the type of installation ('new' or 'update'), for example `2003-08-21-new.txt`.

Once a script file has been created, it can easily be modified and reused.



Note: Refer to [Appendix A \(Installation Script Files\)](#) for further details on creating and modifying script files.

Running an Unattended Installation

To install Inbound Refinery using an unattended installation, complete the following steps:

1. Log in to the Inbound Refinery computer. Be mindful of the user account that you use to install and run Inbound Refinery. For details, see [Preparing the Inbound Refinery Environment](#) (page 2-14).
2. When installing on Windows, close all other Windows programs.
3. Open a command prompt or shell window and navigate to the Inbound Refinery installation directory on the Inbound Refinery distribution media.

4. Launch the installer:

- ❖ **Windows:** Enter `Installer` followed by the name of the script file to be used (including the full path, if required) and press [Enter]. For example:

```
Installer c:\scripts\install.txt
```

- ❖ **UNIX:** Enter `sh ./setup.sh` followed by the name of the script file to be used (including the full path, if required) and press [Enter]. For example:

```
sh ./setup.sh /ul/scripts/install.txt
```



Note: You can specify some command-line parameters for the installer to override a number of default installation settings. For example, you may turn off the initial system checking that takes place by default. For further details refer to [Overriding Script File Entries](#) (page A-13).

5. The installer now analyzes the script file. If it finds no fatal errors, it starts installing Inbound Refinery based on the parameters contained in the installation script file. During that process, a message line shows the percentage of what has been completed, as well as a brief description of the task currently being performed.

Any errors that occur after the initial preinstallation check are recorded in a log file called *log.txt*, which is located in the `<refinery_install_dir>/install` directory. The file is a plain-text file that can be opened and edited using any text editor such as Notepad, WordPad, or vi.



Note: For further details on installation script files, including the available script file entries, refer to [Appendix A \(Installation Script Files\)](#).

POST-INSTALLATION TASKS AND CONSIDERATIONS

OVERVIEW

The following tasks and considerations should be taken into account after installing Inbound Refinery:

- ❖ [Installation Log File](#) (page 4-2)
- ❖ [Installing the InboundRefinerySupport Component on Content Servers](#) (page 4-2)
- ❖ [Configuring Your Web Server](#) (page 4-5)

INSTALLATION LOG FILE

After installing Inbound Refinery, it is recommended that you check the installation log file (*log.txt*) located in the `<refinery_install_dir>/install` directory. If any errors or warnings occurred during the installation, they will be logged in this file. Also, if any steps need to be performed manually after the installation, they will be logged in this file. For example, when installing on UNIX the *Obj.conf* file might need to be copied manually (if you are using Sun ONE, the *magnus.conf* file might also need to be copied). In this case, the log file will specify both the source and target directories.

INSTALLING THE INBOUNDREFINERYSUPPORT COMPONENT ON CONTENT SERVERS

After installing Inbound Refinery, you need to install the InboundRefinerySupport component each content server for which the refinery will be a provider (i.e., for which the refinery will perform conversion jobs). The InboundRefinerySupport component enables Inbound Refinery functionality on the content server and adds the following pages:

- ❖ File Formats Wizard page (Administration—Refinery Administration—File Formats Wizard)
- ❖ Inbound Refinery Conversion Options page (Administration—Refinery Administration—Conversion Options)

For more information on using these pages to administer Inbound Refinery functionality, refer to the *Inbound Refinery Administration Guide*.

This section covers the following topics:

- ❖ [Installing the InboundRefinerySupport Component Using Component Manager](#) (page 4-3)
- ❖ [Installing the InboundRefinerySupport Component Using Component Wizard](#) (page 4-4)



Important: If you chose to configure the refinery as a provider to an existing local content server during installation, the InboundRefinerySupport component must be installed on the content server before you will be able to log into the refinery successfully.

Installing the InboundRefinerySupport Component Using Component Manager

To install the InboundRefinerySupport component using Component Manager, complete the following steps:

1. Open a new browser window and log into the content server as a system administrator.
2. Launch the Admin Server.
3. On the Content Admin Server page, click the button of the content server instance where you want to install the InboundRefinerySupport component. The status page for the content server instance is displayed.
4. In the option list for the server instance, click the **Component Manager** link. The Component Manager page is displayed.
5. Click the **Browse** button next to the **Install New Component** field.
6. Navigate to the InboundRefinerySupport component on the Inbound Refinery distribution media.
7. Double-click on the component zip file or select the component zip file and click **Open**.
8. Click **Install**. An overview page is displayed providing a list of the items that will be installed.
9. Click **Continue**. All required files are now installed. This might take a few minutes.
10. After all files have been copied, a message is displayed stating that the component was uploaded and installed successfully.
11. Click the link to enable the component and restart the server. The content server status page is displayed.
12. Click the restart button to restart the content server instance.

Installing the InboundRefinerySupport Component Using Component Wizard

To install the InboundRefinerySupport component using Component Wizard, complete the following steps:

1. Start Component Wizard:
 - ❖ In Windows, choose **Start—Programs—Stellent Content Server—<instance>—Utilities—Component Wizard**.
 - ❖ In UNIX, navigate to the `<install_dir>/bin` directory. At the command prompt, type `ComponentWizard`.

The Component Wizard main screen and the Component List screen are displayed.
2. Click **Install**. The Install dialog is displayed.
3. Click **Select** and navigate to the InboundRefinerySupport component on the Inbound Refinery distribution media.
4. Double-click on the component zip file or click **Open**. The Install list displays the files that will be installed.
5. Click **OK**. All required files are now installed. This might take a few minutes.
6. After all files have been copied, you are prompted to confirm enabling the component. Click **Yes**.
7. Close Component Wizard.
8. Restart the content server.

CONFIGURING YOUR WEB SERVER

Depending on the web server and installation choices selected during the refinery installation, you might need to perform a number of tasks to set up and configure the web server for use with a refinery:

- ❖ [Manual Configuration of the Web Server](#) (page 4-5)
- ❖ [Sun Web Server Configuration Files](#) (page 4-5)
- ❖ [Registering MIME Types for IIS 6.0](#) (page 4-6)

Manual Configuration of the Web Server

If during the refinery installation you chose to configure the web server manually, you need to perform a number of tasks to set up and configure the web server for use with the refinery. For details see [Appendix B \(Setting Up Your Web Server Manually\)](#).

Sun Web Server Configuration Files

If during the refinery installation you chose to configure the Sun web server automatically, its configuration files were modified. You must apply these changes before they take effect.

To apply the changes to the Sun web server, complete the following steps:

1. Launch the Administer Web Server utility.
2. Enter the user name and password.
3. Select your refinery, and then click **Manage**.
4. A message is displayed indicating that changes were made to your configuration files. Click **OK**.
5. Click **Apply**, which is located in the top-right corner of the screen.
6. The Apply Changes page is displayed. Click **Load Configuration Files**.
7. A message is displayed confirming that your recent changes have been loaded.
8. Click **OK**.
9. Close the browser.

Registering MIME Types for IIS 6.0

For security reasons, IIS 6.0 will not serve a file if its file extension is not registered as a MIME type for the website. MIME (Multipurpose Internet Mail Extensions) is a standard used to communicate the type of data being delivered. When a file extension is not registered, IIS 6.0 returns a 404 (“File not found”) status code to the client browser. When this happens, it is recorded in the IIS logs with sc-status 404 and the scsubstatus 3.

In order to prevent this from happening, you need to register the MIME types with IIS, so it will serve the associated files to the end-users. To do this, complete the following steps:

1. Start the Internet Information Services (IIS) Manager from Administrative Tools.
2. Bring up the Properties dialog for the server level object. The location and text for this object might be different depending on how the tool was started. In any view, it is the level above the “Web Sites” folder.
3. At the bottom of this dialog box, click the “MIME types...” button to bring up the MIME types dialog box. Here you can view, add, edit, remove file extension registrations for the entire server.

Which MIME type to specify depends on the application. Typical settings for some common missing registrations are as follows:

File extension	MIME type
. (i.e., no file extension)	application/octet-stream
.log	text/plain
.dwg (i.e., AutoCAD drawings)	drawing/x-dwg



Note: Note that the ability to add the file extension of just “.” to serve files without an extension was added in an update of Windows Server 2003. Using the no-extension registration is preferred over the wildcard extension (*). The wildcard extension would serve all unknown extensions and thus remove the security benefits of this IIS 6.0 feature.

4. Restart IIS.
5. Test the configuration. When the MIME type has been configured, you will be able to view or download the file.



Note: If you prefer to change the configuration for a specific website, use the MIME types dialog on the HTTP Headers tab of the properties dialog for that site. At site level, the server-wide registrations do not display, making this harder to use.

UPDATING AN EXISTING INBOUND REFINERY

OVERVIEW

This section covers the following topics:

- ❖ [Supported Update Versions](#) (page 5-1)
- ❖ [Before You Begin](#) (page 5-2)
- ❖ [Updating a 10gR3 Refinery Using the Command-Line Installer](#) (page 5-3)

SUPPORTED UPDATE VERSIONS

An existing Inbound Refinery 10gR3 can be updated to a newer version 10gR3 build. Updates from pre-10gR3 versions of Inbound Refinery to version 10gR3 are not supported.

BEFORE YOU BEGIN

Review the following important considerations and recommendations before updating an existing Inbound Refinery 10gR3 installation to a newer version 10gR3 build:

- ❖ Updates are only supported from an existing 10gR3 Inbound Refinery installation to a newer version 10gR3 build. If you are running a pre-10gR3 version of Content Refinery or Inbound Refinery, you will need to complete a new installation of Inbound Refinery 10gR3. If you need assistance, please contact support.
- ❖ Make sure that your hardware and software meets all requirements specified in [Chapter 2 \(Pre-Installation Tasks and Considerations\)](#).
- ❖ If your refinery is running any components, make sure that the components are compatible with the new refinery build, or that new updated component versions are available.
- ❖ Make sure that you have a current backup of the entire directory structure of the directory in which you installed the refinery.
- ❖ Wait until the refinery is not processing any content items. Then, either stop the refinery, or configure the refinery provider not to accept additional conversion jobs.
- ❖ Exit all Content Server and Inbound Refinery applications (applets) before updating the refinery.
- ❖ Make sure there are no browser connections to the refinery before starting the update.
- ❖ If the refinery is running as an application, shut it down before updating the refinery.
- ❖ If the refinery is running as a service, it does not need to be shut down. If the installer detects that the refinery services are running during the update process, it will shut them down automatically and restart them after the update is complete.

UPDATING A 10gR3 REFINERY USING THE COMMAND-LINE INSTALLER

Complete the following steps to update an existing 10gR3 refinery to a newer 10gR3 build using the command-line interface:

1. Log in to the Inbound Refinery computer. Be mindful of the user account that you use to install and run Inbound Refinery. For details, see [Preparing the Inbound Refinery Environment](#) (page 2-14).
2. When updating on Windows, close all other Windows programs.
3. Open a command prompt or shell window and navigate to the Inbound Refinery installation directory on the Inbound Refinery distribution media.
4. Launch the installer:
 - ❖ **Windows:** Enter `Installer` and press [Enter].
 - ❖ **UNIX:** Enter `sh ./setup.sh` and press [Enter].



Note: You can specify some command-line parameters for the installer to override a number of default installation settings. For example, you may turn off the initial system checking that takes place by default. For further details refer to [Overriding Script File Entries](#) (page A-13).

5. You are prompted to choose the language of the update procedure. Select a language from the list, and press [Enter].
6. A menu of installation options is displayed. Press '2' and [Enter] to update an existing refinery.
7. You are prompted to enter the full path to the refinery installation directory (for example, `c:/ucm/ref1/`). Enter the directory path and press [Enter] when you are done.
8. When updating on Windows, you are prompted to specify if the Administration Server service should be run as a specific user. If you want to change this setting, select yes. Otherwise, select no.

If you select yes, you are prompted to enter a username and password. It is recommended that you run the service as the same user used to install Inbound Refinery and its conversion add-ons and to install all required third-party applications.

Make sure that you use the proper syntax for the username:

Local username syntax: `.\[username]`

Domain username syntax: `[domain]\[username]`



Important: If you choose to configure the service to run as a specific user, this user must be granted the right to log on as a Windows service.

9. When updating on Windows, you are prompted to specify if the refinery service should be run as a specific user. If you want to change this setting, select yes. Otherwise, select no.

If you select yes, you are prompted to enter a username and password. It is recommended that you run the service as the same user used to install Inbound Refinery and its conversion add-ons and to install all required third-party applications.

Make sure that you use the proper syntax for the username:

Local username syntax: `.\[username]`

Domain username syntax: `[domain]\[username]`



Important: If you choose to configure the service to run as a specific user (recommended), this user must be granted the right to log on as a Windows service.

10. The installer now performs a number of pre-update checks. If there are any errors or warnings, they are reported. Review the update settings, and then indicate whether the update should proceed or abort, or whether you want to recheck the configuration. When you are ready, choose a menu option and press [Enter].
11. Check the update log file. For details, see [Installation Log File](#) (page 4-2).
12. Update the InboundRefinerySupport component on any content servers using either Component Manager or Component Wizard:
 - a. Disable and uninstall the InboundRefinerySupport component using either Component Manager or Component Wizard.
 - b. Restart the content server.
 - c. Install and enable the new InboundRefinerySupport component. For details, see [Installing the InboundRefinerySupport Component on Content Servers](#) (page 4-2).
 - d. Restart the content server.



INSTALLATION SCRIPT FILES

OVERVIEW

This section covers the following topics:

- ❖ [About Script Files](#) (page A-2)
- ❖ [Script File Structure](#) (page A-2)
- ❖ [Script File Entries](#) (page A-4)
- ❖ [Using Script Files for Unattended Installations](#) (page A-12)
- ❖ [Overriding Script File Entries](#) (page A-13)
- ❖ [Performing Special Installation Tasks on the Windows Command Line](#) (page A-14)

ABOUT SCRIPT FILES

Inbound Refinery 10gR3 is installed using script files, which contain a series of installation parameters used by the installer. The parameters define, for example, where the software should be installed, what JVM should be used, etc.

The script files are built automatically by the software installer, based on the answers provided during the sequence of installation prompts. The software is then installed using the generated script file (which is run in the background).

Inbound Refinery 10gR3 also supports unattended installations. These are basically command-line installations with a specific script file as a parameter. This enables administrators to install and set up Inbound Refinery on multiple computers using the exact same installation settings, without any human intervention (other than starting the installation process). For further details refer to [Using Script Files for Unattended Installations](#) (page A-12).

SCRIPT FILE STRUCTURE

Installation script files are plain-text files that can be created using any text editor such as Notepad, WordPad, or vi. They can be created from scratch, but it is recommended that you take an existing script file and modify it to your needs.

The easiest way to create this file is to go through a new installation of Inbound Refinery, all the way to the final review step. At this point, abort the installation. The installer generated an installation script file that you can use or edit. The location of the script file is the `<refinery_install_dir>/install` directory. The file name is `[date]-new.txt` or `[date]-update.txt`, where [date] is the current date, for example `2003-08-21-new.txt`. For scripts generated on the command line, the date is always formatted as YYYY-MM-DD.

Parameter=Value

Each script file contains a number of installation parameters in the following format:

```
Parameter_Name=Parameter_Value
```

(where each parameter occupies one line).

Comment Lines

All lines in an installation script file that start with # are considered comment lines and are ignored. For example:

```
#This is a comment line.
```

Example Script File

Here is an example of what a script file for a new installation on Windows could look like:

```
<?cfg jcharset="UTF8"?>
IntradocDir=c:/ucm/ref1
InstallJvm=win32-sun-1.5.0_07
VaultDir=c:/ucm/ref1/vault/
WeblayoutDir=c:/ucm/ref1/weblayout/
ConfigureProxiedServer=local_server
MasterServerDir=c:/ucm/cs1/
ConfigureAdminServer=configure_existing
AdminServerDir=c:/ucm/cs1/admin/
WebBrowserPath=c:/program files/internet explorer/iexplore.exe
SystemLocale=English-US
IntradocServerPort=5555
SocketHostAddressSecurityFilter=127.0.0.1|10.143.*.*
HttpRelativeWebRoot=/ref1/
HttpServerAddress=IDVM190
IDC_Name=ref1
InstanceMenuLabel=ref1
InstanceDescription=Inbound Refinery ref1
WebServer=iis
InstallType=new
InstallConfiguration=RefineryInstall
InstallAdminServerService=false
InstallServerService=auto
ConfigureServerServiceRunAs=true
InstallServerServiceUser=.\Administrator
InstallServerServicePassword=idc
ConfigureServerServiceDependency=false
Platform=win32
UserLocale=English-US
RunChecks=true
RunInstall=true
SourceDirectory=G:/InboundRefinery/win32/
SHARED_CONFIG_DIR=$BIN_DIR/./
InstallerJvmPath=G:/InboundRefinery/win32/./././3rdParty/win32/jdk1.5.0_07/bin/java.exe
TargetDir=c:/ucm/ref1/
IsRefineryInstall=1
OS_DIR=$SHARED_CONFIG_DIR
MediaDirectory=G:/InboundRefinery/win32/././
MEDIA_DIR=$BIN_DIR/./
JAVA_CLASSPATH_refineryinstall=$ALLPLATFORM_PACKAGES_DIR/idcrefinery.jar
RefineryInstallTypes=new
InstallDefinitionFile_refinery=ref_install_info.htm
```

SCRIPT FILE ENTRIES

This section lists all installation parameters that can be included in the script files (in alphabetical order), together with descriptions, their possible values, and other considerations.

This section covers the following topics:

- ❖ [General Considerations](#) (page A-4)
- ❖ [Script File Entries](#) (page A-5)

General Considerations

Please note the following general considerations:

- ❖ **Case-sensitivity**—It is recommended that you pay close attention to case when it comes to parameter values, especially for directory paths and file names. This is particularly important if script files are to be used in UNIX environments, which are case-sensitive (i.e., `/u1/IBR/Vault` is not the same as `/u1/ibr/vault`). In Microsoft Windows, path and file names are not case-sensitive, which means this is not an issue on Windows.
Case is not important for true/false-type parameters. It does not matter if the values of such parameters are ‘true’, ‘True’, or ‘TRUE’.
- ❖ **Slashes**—Make sure that you use forward slashes (/) in directory paths (for example, `c:/ibr/vault`), even in a Windows environment (unless indicated otherwise).
- ❖ **Incorrect or missing parameters**—If the installer encounters invalid parameter values, the installation will typically proceed with the default values of these parameters (where possible). For example, if the value of the `CreateDatabase` parameter is set to ‘nein’ (rather than ‘false’ or ‘no’), the installation will proceed, but the database tables will be created automatically (which is the default). If, however, the missing or incorrect parameter is critical for successful installation of the software, the installation is aborted. For example, if the value of the `TargetDir` parameter (target installation directory) contains illegal characters in the path, the installation will abort since the installer has no place to copy files to.
- ❖ **Log files**—The installer creates a log file for each installation. The file is called *log.txt* and is located in the `<refinery_install_dir>/install` directory, for example `c:\ibr\idcrefinery\install\log.txt` or `/u1/ibr/idcrefinery/install/log.txt`.

- ❖ **System variables**—You can use some system variables to refer to certain content server locations:
 - `${SourceDirectory}`: This refers to the directory where the installation files for the content server software are located, for example
`E:/install/InboundRefinery/win32/` or
`/u1/install/InboundRefinery/solaris/`.

 This variable can be used to make relative references to the installation directory, for example `${SourceDirectory}/../..../packages/win32` or `${SourceDirectory}/../..../packages/solaris/`.
- ❖ **Clashing parameters**—If installation parameters clash, the installation procedure is aborted.

Script File Entries

The following script file entries are valid:

Disable8dot3NameCreation=true|yes|false|no

This entry specifies whether the 8.3 file naming convention should be disabled for the refinery. If this parameter has an invalid or no value or is not included in the script file, the 8.3 naming convention will not be disabled.

DisableIISFileHandleCaching=true|yes|false|no

This entry specifies whether file handle caching for IIS should be disabled. If this parameter has an invalid or no value or is not included in the script file, it will not be disabled.

FileEncoding=UTF8|[empty]

This entry specifies whether UTF-8 file encoding should be used for the content server instance. If this parameter has an invalid or no value or is not included in the script file, no UTF-8 file encoding will be used, but rather the default file encoding for the specified system locale.

HttpRelativeWebRoot=[web_root]

This entry specifies the web server root directory as a relative URL. If this parameter has an invalid or no value or is not included in the script file, the default (`/idc/`) will be used. It is recommended that you only use US-ASCII characters for the parameter value. You typically access the refinery login page by typing
`http://[HttpServerAddress]/[HttpRelativeWebRoot]`.

Example: `HttpRelativeWebRoot=/ibr/`

HttpServerAddress=[address]

This entry specifies the HTTP address of the web server. It is used for generating HTML pages that refer to the web server. If the web server is running on a different port than 80, make sure that you append a colon and the port number. The default is the current computer network name (if available). If this parameter has an invalid or no value or is not included in the script file, the installation is aborted. It is recommended that you only use US-ASCII characters for the parameter value.

You typically access the refinery login page by typing

http://[HttpServerAddress]/[HttpRelativeWebRoot].

Example: HttpServerAddress=ibr.company.com:81

IDC_Name=[name]

This entry specifies the unique name of the refinery.

If you install multiple refineries in your organization, make sure that you use different names for each of them. If this parameter has an invalid or no value or is not included in the script file, the installation is aborted.

Example: IDC_Name=Refinery5

IdcAdminServerPort=[address]

This entry defines the port that is used to communicate with the admin server. If you install multiple refineries on the same computer, make sure that you use different admin server ports for each of them.

Please note that refineries can share an admin server port. The default is 4440. If this parameter has an invalid or no value or is not included in the script file, the default port number will be used.

Example: IdcAdminServerPort=4440

InstallAdminServerService=true|yes|false|no|auto

This entry specifies how the Admin Server service should be installed. It can either be installed and started automatically ('auto'), installed but not started automatically ('true' or 'yes'), or it may not be installed altogether ('false' or 'no'). If this parameter has an invalid or no value or is not included in the script file, the service will be installed and started automatically.

InstallerJvmPath=[path]

This entry defines the full path to the java executable that should be used to install the Java Virtual Machine (JVM).

Example: InstallerJvmPath=D:/VM_Installer/jdk1.5.0_07/bin/java.exe

Example: InstallerJvmPath=/ul/JVM_Installer/jdk1.5.0_07/bin/java.exe

InstallJvm=default|current|custom

Defines what Java virtual machine (JVM) should be installed with the Inbound Refinery software:

- **default:** The default JVM (see page 2-6) will be installed for use with Inbound Refinery.
- **current:** This option is relevant for updates only. If the parameter is set to this value, the JVM currently used with Inbound Refinery will continue to be used.
- **custom:** A user-specified JVM will be used. The `JvmPath` parameter specifies the path to the `java.exe` executable that Inbound Refinery should use.

If this parameter has an invalid or no value or is not included in the script file, the default JVM (see page 2-6) will be installed.

InstallServerService=true|yes|false|no|auto

This entry specifies how the refinery service should be installed. It can either be installed and started automatically ('auto'), installed but not started automatically ('true' or 'yes'), or it may not be installed altogether ('false' or 'no'). If this parameter has an invalid or no value or is not included in the script file, the service will be installed and started automatically.

InstallServerServiceDependency=[value]

This entry specifies the name of a service that must run before the content server service will be started.

Example: `InstallServerServiceDependency=MSSQLServer`

InstallType=new|update

This entry specifies the type of installation. The following options are supported:

- **new:** This option installs a new refinery.
- **update:** This option updates an existing refinery.

InstanceDescription=[description]

This entry specifies the long description for the refinery. If this parameter has an invalid or no value or is not included in the script file, the instance description will be blank (and the installation will continue normally).

Example: `InstanceDescription=Refinery_5`

InstanceMenuLabel=[label]

This entry specifies a short label for the refinery. This label is used on web pages to identify this instance. The maximum number of characters for the label is 12. If this parameter has an invalid or no value or is not included in the script file, the instance description will be blank (and the installation will continue normally).

Example: InstallConfiguration=REF5

IntradocDir=[path]

This entry specifies the installation directory of Inbound Refinery. If this parameter has no value or is not included in the script file, the installation is aborted.

Example: IntradocDir=c:/ibr

Example: IntradocDir=/ul/ibr

IntradocServerPort=[port]

This entry specifies the port that the web server filter or any other application should use to talk to the refinery. If you install multiple refineries on the same computer, make sure that you use different server ports for each of them. If this parameter has an invalid or no value or is not included in the script file, the default port number will be used. The default is 4444.

Example: IntradocServerPort=4445

JvmPath=[path]

Used in conjunction with the `InstallJvm` parameter. It specifies the location of the custom Java virtual machine (JVM) that will be used with Inbound Refinery. If this parameter has an invalid or no value or is not included in the script file, the default JVM will be used.

Example: JvmPath=c:/winnt/system32/java.exe

Example: JvmPath=/u1/jvm/java.exe

NtlmSecurityEnabled=ntlm|adsi|no

This entry specifies what type of security should be used (Windows only):

- **ntlm:** If the parameter is set to this value, user/role/account information are mapped from Microsoft network security.
- **adsi:** If the parameter is set to this value, Active Directory Services Interface (ADSI) is used.

- **no:** If the parameter is set to this value, standard security will be used. This means that user/role/account information must be set up separately from Windows NT security.

Please note that Oracle Inbound Refinery 10gR3 does not support NTLM on Microsoft Windows Server 2003. If this parameter has an invalid or no value or is not included in the script file, standard security will be used.

Platform=win32|solaris|linux

Specifies the hardware platform that the Inbound Refinery software is installed on.

RunChecks=true|yes|false|no

Specifies whether the installer will perform a number of system checks before starting the installation procedure. If this parameter has an invalid or no value or is not included in the script file, the preinstallation checks will be carried out.

RunInstall=true|yes|false|no

If this parameter is set to 'false' or 'no', the installation procedure will not be executed. This may be useful if you want to perform the installation checks, but not go ahead with the actual installation.

SocketHostAddressSecurityFilter=[IP_addresses]

This entry specifies the IP security filter, which restricts access to the refinery. Only hosts with IP addresses matching the specified criteria are granted access to the refinery. The default is 127.0.0.1 (localhost), but you can add any number of valid IP addresses. You can specify multiple IP addresses separated by the pipe symbol (|), and you can use wildcards (* for zero or many characters, and ? for single characters).

Example: SocketHostAddressSecurityFilter=127.0.0.1|163.192.10.*

SourceDirectory=[path]

Specifies the directory where the Inbound Refinery installation files are located. If this parameter has an invalid or no value or is not included in the script file, the installation is aborted.

Example: SourceDirectory=E:/install/InboundRefinery/win32/

Example: SourceDirectory=/u1/install/InboundRefinery/solaris/

SystemLocale=[locale]

This entry specifies the system locale for the refinery. If this parameter has an invalid or no value or is not included in the script file, the installer will use the system locale of the operating system on the target computer.

The LocaleConfig table in */InboundRefinery/resources/std_locale.htm* (lcLocaleId column) on the software distribution media lists the system locale values that can be specified. They include the following:

English-US, English-UK, Deutsch, Français, Español, Japanese, Korean, Italiano, Português, Nederlands, Dansk, Svenska, and Suomi.

Example: SystemLocale=English-US

SystemTimeZone=[time_zone]

This entry specifies the default time zone for the refinery. If this parameter has an invalid or no value or is not included in the script file, the installer will use the current time zone of the operating system on the target computer.

The SystemTimeZones table in */InboundRefinery/resources/std_locale.htm* (lcTimeZone column) on the software distribution media lists the time zone values that can be specified. They include the following:

America/Los_Angeles, America/Denver, America/Chicago, America/New_York, Europe/London, Europe/Paris, Asia/Singapore, Asia/Seoul, and Asia/Tokyo.

Example: SystemTimeZone=America/Chicago

TargetDir=[path]

This entry specifies the installation directory of Content Server. If this parameter has no value or is not included in the script file, the installation is aborted.

Example: TargetDir=c:/ibr/

Example: TargetDir=/ul/ibr/

UserLocale=[locale]

This entry specifies the default user locale for the content server. If this parameter has an invalid or no value or is not included in the script file, the installer will use the user locale of the operating system on the target computer.

The LocaleConfig table in *\ContentServer\resources\std_locale.htm* or */ContentServer/resources/std_locale.htm* (lcLocaleId column) on the software distribution media lists the user locale values that can be specified. They include the following:

English-US, English-UK, Deutsch, Français, Español, Japanese, Korean, Italiano, Português, Nederlands, Dansk, Svenska, and Suomi.

Example: SystemLocale=English-US

VaultDir=[path]

This entry sets the path to the root directory of the native-file repository. If this parameter has no value or is not included in the script file, the installer will assume *[IntradocDir_Variable]/vault*.

Example: VaultDir=c:/ibr/vault

Example: VaultDir=/ul/ibr/vault

WebBrowserPath=[path]

This is the path to the web browser executable that is used to view the Inbound Refinery help system. If this parameter has an invalid or no value or is not included in the script file, Inbound Refinery's Help system will not work in the stand-alone applications.

Example: WebBrowserPath=C:/Program Files/Internet Explorer/ iexplore.exe

Example: WebBrowserPath=/u1/netscape/netscape.exe

WeblayoutDir=[path]

This entry sets the path to the root directory of the web-viewable file repository .If this parameter has an invalid or no value or is not included in the script file, the installer will assume *[IntradocDir_Variable]/weblayout*.

Example: VaultDir=c:/ibr/weblayout

Example: VaultDir=/ul/ibr/weblayout

WebServer=apache | nes6 | iis | manual

This entry specifies what web server will be used in conjunction with the refinery. If this parameter has an invalid or no value or is not included in the script file, the web server will need to be configured manually. If you want to use Sun ONE, use 'nes6'.

USING SCRIPT FILES FOR UNATTENDED INSTALLATIONS

You can use script files to run unattended installations. This enables administrators to install and set up the Inbound Refinery software on multiple computers using the exact same installation settings, without any human intervention (other than starting the installation process).



Important: Before running a script file to install the Inbound Refinery software, make sure that the target computer meets all hardware and software prerequisites. For example, make sure that the web server specified in the script file is up and running on the target computer, etc. Otherwise the installation might fail.

To perform an unattended installation, run the installer with the name of a script file as the command-line parameter, for example:

```
Installer install.txt
```

or:

```
sh ./setup.sh install.txt
```

The installer will immediately analyze the installation script and start the installation process (providing no fatal errors were found).

OVERRIDING SCRIPT FILE ENTRIES

The installer will normally use all the installation parameters as they are included in the script file. However, it is possible to override parameter values in the script file at run time. This is done by adding one or more parameters to the command line in the following format:

```
--set-[parameter_name]=[value]
```

For example:

```
installer --set-RunChecks=false --set-InstallJvm=false script.txt
```

or:

```
sh ./setup.sh --set-RunChecks=false --set-InstallJvm=false script.txt
```



Note: Make sure that you provide the script file name *after* any parameter overrides.

In the preceding example, the installer uses the file *script.txt* to obtain the installation parameters, and uses the values of the variables `RunChecks` and `InstallJvm` specified on the command line (regardless of what they are in the script file). This can be useful in a number of situations. For example, some installation parameters need to be unique for each refinery, for example `IDC_Name` (i.e., instance name). You can accommodate for this by specifying this parameter on the command line.

PERFORMING SPECIAL INSTALLATION TASKS ON THE WINDOWS COMMAND LINE

The installer can also be used to perform special installation tasks on the Windows command line. This is done by running `installer.exe` with some specific parameters. You can do the following:

- ❖ Create or remove the configuration of IIS
- ❖ Create or remove the Inbound Refinery shortcuts from the Start menu
- ❖ Create or remove Inbound Refinery entries in the Windows Registry
- ❖ Build the portal page

To perform these tasks, complete the following steps:

1. Log in to the Inbound Refinery computer as the user being used to run Inbound Refinery.
2. Close all other Windows programs.
3. Open a command prompt window and navigate to the *bin* directory of the refinery that you want to perform the task for, for example `c:\ibr\idcm1\bin`.



Important: Make absolutely sure that you go to the *bin* directory of the correct refinery. Otherwise you may unintentionally perform the installation tasks on the wrong refinery, which can cause it to stop functioning.

4. Enter `Installer [Parameters]` and press [Enter].
5. The specified installation task is now performed.

Supported Parameters

The following parameters are supported:

BuildPortal

If you run the installer with this parameter, the installer rebuilds the portal page of the refinery.

ConfigureIIS

If you run the installer with this parameter, the IIS web server is configured for use with the refinery. (See also `UnconfigureIIS`.)

CreateShortcuts

If you run the installer with this parameter, all shortcuts for the refinery are created in the Windows Start menu. (See also `RemoveShortcuts`.)

RefineryRegisterAll

If you run the installer with this parameter, the installer performs the `CreateShortCuts`, `ConfigureIIS`, and `Register` tasks in a single operation. (See also `RefineryUnregisterAll`.)

RemoveShortcuts

If you run the installer with this parameter, all shortcuts for the refinery are removed from the Windows Start menu. (See also `CreateShortcuts`.)

UnconfigureIIS

If you run the installer with this parameter, the configuration of the IIS web server for use with the refinery is removed. (See also `ConfigureIIS`.)

RefineryUnregisterAll

If you run the installer with this parameter, the installer performs the `RemoveShortCuts`, `UnconfigureIIS`, and `Unregister` tasks in a single operation. (See also `RefineryRegisterAll`.)

SETTING UP YOUR WEB SERVER MANUALLY

OVERVIEW

This appendix explains the steps that need to be performed if you set up your web server manually. It covers the following topics:

- ❖ [Setting Up IIS 5.0 \(Windows 2000 Server\)](#) (page B-2)
- ❖ [Setting Up IIS 6.0 \(Windows Server 2003\)](#) (page B-7)
- ❖ [Setting Up Sun Web Server](#) (page B-13)
- ❖ [Setting Up Apache](#) (page B-17)



Note: Make sure that you read the pre-installation tasks and considerations in [Chapter 2 \(Pre-Installation Tasks and Considerations\)](#).

SETTING UP IIS 5.0 (WINDOWS 2000 SERVER)

If you chose to set up IIS 5.0 manually during the installation of the Inbound Refinery software, you need to complete the following steps:

1. [Specifying the Web Server](#) (page B-2)
2. [Setting Up Password Authentication](#) (page B-2)
3. [Setting Up Virtual Directories \(Aliases\)](#) (page B-3)
4. [Setting Up the ISAPI Authentication Filter](#) (page B-5)
5. [Specifying the Filter Name and Location](#) (page B-6)

Specifying the Web Server

Since you chose to set up IIS 5.0 manually, the Inbound Refinery installer did not automatically specify the web server in the refinery's configuration files. To do this manually, complete the following steps:

1. Go to the file `<refinery_install_dir>\config\config.cfg`, and open this file in a text editor.
2. Make sure the file includes the following entry:
`WebServer=iis`
(This entry will be typically be under `#Additional Variables`.)
3. Save the modified configuration file.

Setting Up Password Authentication

To specify how IIS 5.0 verifies the identity of users, complete the following steps:

1. Launch the Internet Information Services (IIS) Manager.
2. Expand the tree entry of the refinery.
A number of websites and/or virtual servers unfold.
3. Select the **Default Web Site** entry, right-click, and then choose **Properties**.
The Default Web Site Properties screen is displayed.
4. On the Directory Security tab, click **Edit** in the "Anonymous access and authentication control" box.

The Authentication Methods screen is displayed.

5. Set the authentication methods as follows:
 - Anonymous access:selected
 - Basic authentication
(password is sent in clear text):cleared

If you chose to use NT security during the Inbound Refinery installation, make sure the “Integrated Windows authentication” check box is also selected.

6. Click **OK** twice to return to the main screen.
7. Exit the application, saving any changes you made.

Setting Up Virtual Directories (Aliases)

You need to set up two virtual directories (“aliases”) to point to the refinery’s web-viewable file repository (“Web Layout”) and the filter plugin directory. To accomplish this, complete the following steps:

1. Launch the Internet Information Services (IIS) Manager.
2. Expand the tree entry of the refinery.
A number of websites and/or virtual servers unfold.
3. Select the **Default Web Site** option, right-click, and then choose **New—Virtual Directory**.

The Virtual Directory Creation Wizard is started.



Important: It is extremely important that you create a *new* virtual directory and not use an existing one. Otherwise security issues might arise.

4. Click **Next** in the welcome screen.
5. Enter the virtual directory alias name (typically the refinery’s relative web root, for example *ibr*), and click **Next** to continue.
6. Specify the physical path to the web-viewable file directory of the refinery (for example, *c:\ibr\refl\weblayout*), and click **Next** to continue.
7. Set the access permissions as follows:
 - Read:selected
 - Run scripts:cleared
 - Execute:cleared

- Write:set according to your application's requirements
- Browse:set according to your application's requirements

When you are done, click **Next** to continue.

8. Click **Finish** to complete the wizard.
You are now back in the main Internet Information Services screen.
9. Right-click the virtual directory that you created in step 5, and then choose **Properties**.
10. On the Documents tab, make sure that the "Enable Default Document" check box is selected and *portal.htm* is included in the box below. If it is not, click **Add**, type *portal.htm*, and click **Apply**.
11. On the Directory Security tab, click **Edit** in the "Anonymous access and authentication control" box.

The Authentication Methods screen is displayed.
12. Make sure the "Anonymous access" check box is selected.
If you chose to use NT security during the Inbound Refinery installation, make sure the "Integrated Windows authentication" check box is also selected.
13. Click **OK** twice to return to the main Internet Information Services screen.
14. Right-click the virtual directory that you created in step 5, and then choose **New—Virtual Directory**.

Virtual Directory Creation Wizard is started.
15. Click **Next** in the welcome screen.
16. Enter "idcplg" as the virtual directory alias name and click **Next** to continue.
17. Specify the physical path to the filter plugin directory (for example, *c:\ibr\refl\idcplg*), and click **Next** to continue.
18. Set the access permissions as follows:
 - Read:cleared
 - Run scripts:selected
 - Execute:selected
 - Write:cleared
 - Browse:cleared

When you are done, click **Next** to continue.

19. Click **Finish** to complete the wizard.
You are now back in the main screen.
20. Make sure the virtual directory that you created in step 5 is expanded. Right-click the newly created 'idcplg' item, and then choose **Properties**.
21. On the Documents tab, verify that the "Enable Default Document" check box is not selected, and click **Apply**.
22. On the Directory Security tab, click **Edit** in the "Anonymous access and authentication control" box.

The Authentication Methods screen is displayed.
23. Make sure the "Anonymous access" check box is selected.
If you chose to use NT security during the Inbound Refinery installation, make sure the "Integrated Windows authentication" check box is also selected.
24. Click **OK** twice to return to the main screen.
25. Exit the application, saving any changes you made.

Setting Up the ISAPI Authentication Filter

To set up the ISAPI authentication filter for IIS 5.0, complete the following steps:

1. Launch the Internet Information Services (IIS) Manager.
2. Expand the tree entry of the refinery.

A number of websites and/or virtual servers unfold.
3. Select the **Default Web Site** option, right-click, and then click **Properties**.

The Default Web Site Properties screen is displayed.
4. Open the ISAPI Filters tab.
5. Click **Add**.
6. The Filter Properties dialog is displayed.
7. Enter `Idc Plugin [Instance_Name]` in the Filter Name field, for example "Idc Plugin idcm1."
8. In the Executable field, specify the name and location of the executable ISAPI filter (for example, `c:\ibr\refl\idcplg\idc_cgi_isapi-idcm1.dll`).
9. Click **OK** twice to return to the main screen.

10. Exit the application, saving any changes you made.



Important: If Microsoft FrontPage is installed, setting up the ISAPI authentication filter will disable Microsoft FrontPage.



Note: After installation of the Oracle Inbound Refinery software, all web server plugins and cgi programs are available in the following directories:

❖ `<refinery_install_dir>\shared\os\win32\lib`

❖ `<refinery_install_dir>\shared\os\win32\bin`

Specifying the Filter Name and Location

If you set up IIS 5.0 manually, you need to check the references to the refinery web filter in the following configuration files:

❖ `<refinery_install_dir>\admin\config\config.cfg`

❖ `<refinery_install_dir>\config\config.cfg`

❖ `<refinery_install_dir>\admin\data\servers\<instance_name>\server.hda`

HTTP Relative CGI Root

The HTTP relative CGI root is the location of Oracle Inbound Refinery's web filter. The default location is the *idcplg* subdirectory of the refinery root directory (for example, *c:\ibr\refl\idcplg*). If you want to use a different directory, you need to make sure each of the configuration files above refers to the correct location (which is a subdirectory of refinery's installation directory):

```
HttpRelativeCgiRoot=/<new_directory>/
```

CGI File Name

Make sure that each of the preceding configuration files contains the following entry:

```
CgiFileName=idcplg
```

(If the `CgiFileName` entry already exists, modify it to match the line above.)

SETTING UP IIS 6.0 (WINDOWS SERVER 2003)

If you chose to set up IIS 6.0 manually during the installation of the Inbound Refinery software, you need to complete the following steps:

1. [Specifying the Web Server](#) (page B-2)
2. [Setting Up Password Authentication](#) (page B-2)
3. [Setting Up Virtual Directories \(Aliases\)](#) (page B-3)
4. [Setting Up the ISAPI Authentication Filter](#) (page B-5)
5. [Specifying the Filter Name and Location](#) (page B-6)
6. [Setting Up the Web Service Extension](#) (page B-12)
7. [Registering MIME Types](#) (page B-12)

Specifying the Web Server

Since you chose to set up IIS 6.0 manually, the Inbound Refinery installer did not automatically specify the web server in the refinery's configuration files. To do this manually, complete the following steps:

1. Go to the file `<refinery_install_dir>\config\config.cfg`, and open this file in a text editor.
2. Make sure the file includes the following entry:
`WebServer=iis`
(This entry will be typically be under `#Additional Variables`.)
3. Save the modified configuration file.

Setting Up Password Authentication

To specify how IIS 6.0 verifies the identity of users, complete the following steps:

1. Launch the Internet Information Services (IIS) Manager.
2. Expand the tree entry of the refinery.
3. Expand the Web Sites entry.

A number of websites and/or virtual servers unfold.

4. Select the **Default Web Site** entry, right-click, and then choose **Properties**.
The Default Web Site Properties screen is displayed.
5. On the Directory Security tab, click **Edit** in the “Authentication and access control” box.
The Authentication Methods screen is displayed.
6. Set the authentication methods as follows:
 - Enable anonymous access: selected
 - Basic authentication
(password is sent in clear text): cleared



Note: Do not change the user name or password for anonymous access.

If you chose to use NT security during the Inbound Refinery installation, make sure the “Integrated Windows authentication” check box is also selected.

7. Click **OK** twice to return to the main screen.
8. Exit the application, saving any changes you made.

Setting Up Virtual Directories (Aliases)

You need to set up two virtual directories (“aliases”) to point to the refinery’s web-viewable file repository (“Web Layout”) and the filter plugin directory. To accomplish this, complete the following steps:

1. Launch the Internet Information Services (IIS) Manager.
2. Expand the tree entry of the refinery.
3. Expand the Web Sites entry.
A number of websites and/or virtual servers unfold.
4. Select the **Default Web Site** option, right-click, and then choose **New—Virtual Directory...**

The Virtual Directory Creation Wizard is started.



Important: It is extremely important that you create a *new* virtual directory and not use an existing one. Otherwise security issues might arise.

5. Click **Next** in the welcome screen.

6. Enter the virtual directory alias name (typically the refinery's relative web root, for example *ibr*), and click **Next** to continue.
7. Specify the physical path to the web-viewable file directory of the refinery (for example, *c:\ibr\refl\weblayout*), and click **Next** to continue.
8. Set the access permissions as follows:
 - Read:selected
 - Run scripts:cleared
 - Execute:cleared
 - Write:set according to your application's requirements
 - Browse:set according to your application's requirements

When you are done, click **Next** to continue.

9. Click **Finish** to complete the wizard.
You are now back in the main screen.
10. Right-click the virtual directory that you created in step 5, and then choose **Properties**.
11. On the Documents tab, make sure that the "Enable default content page" check box is selected and *portal.htm* is included in the box below. If it is not, click **Add**, type *portal.htm*, and click **Apply**.
12. On the Directory Security tab, click **Edit** in the "Authentication and access control" box.

The Authentication Methods screen is displayed.
13. Make sure the "Enable anonymous access" check box is selected.
If you chose to use NT security during the Inbound Refinery installation, make sure the "Integrated Windows authentication" check box is also selected.
14. Click **OK** twice to return to the main screen.
15. Right-click the virtual directory that you created in step 5, and then choose **New—Virtual Directory...**

The Virtual Directory Creation Wizard is started.
16. Click **Next** in the welcome screen.
17. Enter "idcplg" as the virtual directory alias name and click **Next** to continue.
18. Specify the physical path to the filter plugin directory (for example, *c:\ibr\refl\idcplg*), and click **Next** to continue.

19. Set the access permissions as follows:

- Read:cleared
- Run scripts:selected
- Execute:selected
- Write:cleared
- Browse:cleared

When you are done, click **Next** to continue.

20. Click **Finish** to complete the wizard.

You are now back in the main screen.

21. Make sure the virtual directory that you created in step 5 is expanded. Right-click the newly created 'ideplg' item, and then choose **Properties**.

22. On the Documents tab, verify that the "Enable default content page" check box is not selected, and click **Apply**.

23. On the Directory Security tab, click **Edit** in the "Authentication and access control" box.

The Authentication Methods screen is displayed.

24. Make sure the "Enable anonymous access" check box is selected (do not change the user name or password).

If you chose to use NT security during the Inbound Refinery installation, make sure the "Integrated Windows authentication" check box is also selected.

25. Click **OK** twice to return to the main screen.

26. Exit the application, saving any changes you made.

Setting Up the ISAPI Authentication Filter

To set up the ISAPI authentication filter for IIS 6.0, complete the following steps:

1. Launch the Internet Information Services (IIS) Manager.
2. Expand the tree entry of the refinery.
3. Expand the Web Sites entry.

A number of websites and/or virtual servers unfold.

4. Select the **Default Web Site** option, right-click, and then click **Properties**.
The Default Web Site Properties screen is displayed.
5. Open the ISAPI Filters tab.
6. Click **Add**.
7. The Add/Edit Filter Properties dialog is displayed.
8. Enter `Idc Plugin [Instance_Name]` in the Filter Name field, for example “Idc Plugin idcm1.”
9. In the Executable field, specify the name and location of the executable ISAPI filter (for example, `c:\ibr\refl\idcplg\idc_cgi_isapi-idcm1.dll`).
10. Click **OK** twice to return to the main screen.
11. Exit the application, saving any changes you made.



Important: If Microsoft FrontPage is installed, setting up the ISAPI authentication filter will disable Microsoft FrontPage.



Note: After installation of the Oracle Inbound Refinery software, all web server plugins and cgi programs are available in the following directories:

- ❖ `<refinery_install_dir>\shared\os\win32\lib`
- ❖ `<refinery_install_dir>\shared\os\win32\bin`

Specifying the Filter Name and Location

If you set up IIS 6.0 manually, you need to check the references to the refinery web filter in the following configuration files:

- ❖ `<refinery_install_dir>\admin\config\config.cfg`
- ❖ `<refinery_install_dir>\config\config.cfg`
- ❖ `<refinery_install_dir>\admin\data\servers\<instance_name>\server.hda`

HTTP Relative CGI Root

The HTTP relative CGI root is the location of Oracle Inbound Refinery's web filter. The default location is the *idcplg* subdirectory of the refinery root directory (for example, *c:\ibr\refl\idcplg*). If you want to use a different directory, you need to make sure each of the configuration files above refers to the correct location (which is a subdirectory of refinery's installation directory):

```
HttpRelativeCgiRoot=/[New_Directory]/
```

CGI File Name

Make sure that each of the preceding configuration files contains the following entry:

```
CgiFileName=idcplg
```

(If the `CgiFileName` entry already exists, modify it to match the line above.)

Setting Up the Web Service Extension

If you set up IIS 6.0 manually, you need to set up the web service extension:

1. Launch the Internet Information Services (IIS) Manager.
2. Expand the tree entry of the refinery.
3. Select the Web Service Extensions link.
4. Click on "Add a new Web service extension..."
5. Provide an extension name, for example "Idc Plugin idcm1".
6. Click the **Add** button to add the required file, for example
`<refinery_install_dir>\idcplg\idc_cgi_isapi_idcm1.dll`.
7. Make sure that you select the "Set extension status to Allowed" check box.

Registering MIME Types

For security reasons, IIS 6.0 will not serve a file if its file extension is not registered as a MIME type for the website. Depending on the file types handled by your refinery, you might need to register their MIME types with IIS, so the web server will serve the associated file types to the client browsers.

SETTING UP SUN WEB SERVER

If you chose to set up the Sun web server manually during the installation of the Oracle Inbound Refinery software, you need to complete the following steps:

1. [Adding an Additional Document Directory](#) (page B-13)
2. [Specifying the CGI Directory](#) (page B-14)
3. [Modifying the obj.conf File](#) (page B-14)
4. [Modifying the magnus.conf File](#) (page B-15)
5. [Specifying the Filter Name and Location](#) (page B-16)

Adding an Additional Document Directory

The web server needs to know where the refinery's web-viewable file repository (*weblayout* directory) is located. To accomplish this, complete the following steps:

1. Launch the Administer Web Server utility.
2. Enter the user name and password.
3. Select your refinery, and then click **Manage**.
4. Click **Class Manager** in the top right-hand corner of the page.
5. Open the **Content Mgmt** tab.
6. Click the **Additional Document Directories** link on the left side of the page.
7. Enter `ibr` as the URL prefix.
8. Enter `<refinery_install_dir>/weblayout` as the directory to map to, for example:
`c:/ibr/ref1/weblayout`
or:
`/u1/ibr/ref1/weblayout`
9. Click **OK** when you are done.

Specifying the CGI Directory

The web server needs to know where the refinery's CGI directory is located. To accomplish this, complete the following steps:

1. Launch the Administer Web Server utility.
2. Enter the user name and password.
3. Select your refinery, and then click **Manage**.
4. Click **Class Manager** in the top right-hand corner of the page.
5. Open the **Programs** tab.
6. Click the **CGI Directory** link on the left side of the page.
7. Enter `idcplg` as the URL prefix.
8. Enter `<refinery_install_dir>/idcplg` as the CGI directory, for example:
`c:/ibr/ref1/idcplg`
or:
`/ul/ibr/ref1/idcplg`
9. Click **OK** when you are done.

Modifying the *obj.conf* File

You need to modify the *obj.conf* file of the Sun web server to include two new entries:

1. Go to the Sun web server software directory, and open the `https-<host_name>/config` subdirectory, for example:
`c:\iplanet\servers\https-server7\config`
or:
`/ul/iplanet/servers/https-server7/config`
2. Open the file *obj.conf* in a text editor.

3. Add the following 'ppath' object to the *obj.conf* file:

```
<Object ppath="[weblayout_dir]/*">
NameTrans fn="idcNameTrans"
PathCheck fn="idcPathCheck"
Service fn="idcService"
</Object>
```

(*[weblayout_dir]* is the full path to the web-viewable file repository, for example *c:/ibr/ref1/weblayout* or */ul/ibr/ref1/weblayout*.)



Note: Enter the Object entry above on multiple lines, as shown.

4. Inside the <Object name="default"> section, add the following line:

```
NameTrans fn="pfx2dir" from="/[relative_web_root]"
dir="[weblayout_dir]"
```

(*[relative_web_root]* is the relative web root of the refinery, and *[weblayout_dir]* is the full path to the web-viewable file repository.)

Examples:

```
NameTrans fn="pfx2dir" from="/ibr" dir="c:/ibr/ref1/weblayout"
NameTrans fn="pfx2dir" from="/ibr" dir="/ul/ibr/ref1/weblayout"
```



Important: Enter the NameTrans entry above on a single line and not on multiple lines as shown (add a space instead of a line break).

5. Apply the changes that you just made to the *obj.conf* file on the web server's administration page.
6. Stop and restart the web server.

Modifying the *magnus.conf* File

You need to configure the *magnus.conf* file of the Sun web server to include two new entries:

1. Go to the Sun web server software directory, and open the *https-<host_name>/config* subdirectory, for example:

```
c:\iplanet\servers\https-server7\config
```

or:

```
/ul/iplanet/servers/https-server7/config
```

2. Open the file *magnus.conf* in a text editor.

3. Add the following entries after the last 'Init fn' entry:

Windows:

```
Init fn="load-modules"
funcs="idcInit,idcNameTrans,idcPathCheck, idcService"
shlib="[refinery_install_dir]/shared/os/[OS]/lib/
IdcNSAuth.dll"
Init fn="idcInit" idocdb="[refinery_install_dir]/data/users/userdb.txt"
```

UNIX:

```
Init fn="load-modules"
funcs="idcInit,idcNameTrans,idcPathCheck, idcService"
shlib="[refinery_install_dir]/shared/os/[OS]/lib/
IdcNSAuth.so"
Init fn="idcInit" idocdb="[refinery_install_dir]/data/users/userdb.txt"
```

(*[refinery_install_dir]* is the full path to the installation directory of the refinery, and *[OS]* the name of the operating system.)



Important: Enter each of the Init entries above on a single line and not on multiple lines as shown (add a space instead of a line break).

4. Apply the changes that you just made to the *magnus.conf* file on the web server's administration page.
5. Stop and restart the web server.

Specifying the Filter Name and Location

You need to check the name and location of the refinery web filter. This file is referenced in the following configuration files:

- ❖ *<refinery_install_dir>/admin/config/config.cfg*
- ❖ *<refinery_install_dir>/config/config.cfg*
- ❖ *<refinery_install_dir>/admin/data/servers/<instance_name>/server.hda*

HTTP Relative CGI Root

The HTTP relative CGI root is the location of Oracle Inbound Refinery's web filter. The default location is the *idcplg* subdirectory of the refinery root directory (for example, *c:\ibr\refl\idcplg* or */u1/ibr/refl/idcplg*). If you want to use a different directory, you need to make sure each of the configuration files above refers to the correct location (which is a subdirectory of the refinery's installation directory):

```
HttpRelativeCgiRoot=/[new_directory]/
```

CGI File Name

You need to make sure that each of the configuration files above contains the following entry:

```
CgiFileName=idcplg
```

(If the `CgiFileName` entry already exists, modify it to match the line above.)

SETTING UP APACHE

Since Apache cannot be configured automatically by the Inbound Refinery installer, you need to do it manually. This consists of the following steps:

1. [Configuring Apache for Refineries](#) (page B-17)
2. [Enabling Debug on Apache](#) (page B-18)
3. [Log Dump File](#) (page B-19)
4. [Turning Off “Canonical” Names](#) (page B-19)

Configuring Apache for Refineries

To configure Apache for refineries, complete the following steps:

1. For each refinery, add the following configuration entries to the bottom of the *httpd.conf* file (or at least below the ‘clearmodulelist’ line):

- **Solaris and Linux:**

```
LoadModule IdcApacheAuth [Webserver_Filters_Path] /IdcApache2Auth.so
IdcUserDB [Refinery_Instance] "[User_Data_Dir_Path]/userdb.txt"
```

- **Windows:**

```
LoadModule IdcApacheAuth [Webserver_Filters_Path] /IdcApache2Auth.dll
IdcUserDB [Refinery_Instance] "[User_Data_Dir_Path]/userdb.txt"
```

(Please note that each of the entries above is on a single line.)



Note: The path to the web server filters is on Windows is usually *[root_dir]\shared\os\win32\lib* and on UNIX is usually *[root_dir]/shared/os/[OS_name]/lib* (where *[OS_name]* is the name of the operating system, for example ‘solaris’). *[refinery_instance]* is usually the instance name of the refinery (IDC_NAME parameter in *config.cfg*). The path to the user data directory is usually *[root_dir]\data\users* or *[root_dir]/data/users*.

For example:

```
LoadModule IdcApacheAuth C:/ibr/ref1/shared/os/win32/lib/ IdcApache2Auth.dll
IdcUserDB ibr "C:/ibr/ref1/data/users/userdb.txt"
```

or:

```
LoadModule IdcApacheAuth /u1/apps/ibr/ref1/shared/os/solaris/lib/
IdcApache2Auth.so
IdcUserDB ibr "/u1/apps/ibr/ref1/data/users/userdb.txt"
```

2. Add the following entries to set up the alias to the refinery *weblayout* directory and have its security controlled by the filter.

```
Alias /[Rel_URL_To_Refinery] "[Path_To_Refinery_WebL.]"
<Location /[Rel_URL_To_Refinery]>
    DirectoryIndex portal.htm
    IdcSecurity [Refinery_Instance]
</Location>
```

For example:

```
Alias /ibr "C:/ibr/ref1/weblayout"
<Location /ibr>
    DirectoryIndex portal.htm
    IdcSecurity ibr
</Location>
```

or:

```
Alias /ibr "/u1/apps/ibr/ref1/weblayout"
<Location /ibr>
    DirectoryIndex portal.htm
    IdcSecurity ibr
</Location>
```



Note: The path to the web layout of the refinery is usually *[root_dir]\weblayout* or *root_dir/weblayout*, but it might be relocated to another disk drive. The relative URL to the refinery should be specified without its trailing slash. *[refinery_instance]* is usually the instance name of the refinery (IDC_NAME parameter in *config.cfg*) and should match the name used for the IdcUserDB entry.

Enabling Debug on Apache

To enable debug on Apache, complete the following steps:

1. Log into the refinery as an administrator.
2. Open the Administration page.
3. Click on the **Filter Administration** link. (You might need to scroll down.)

The Configure Web Server Filter page is displayed.

4. Under Logging Options, make sure that the CGI_RECEIVE_DUMP and CGI_SEND_DUMP options are both selected.
5. Click the **Update** button in the Logging Options section.

Log Dump File

The log dump will go to the file `<refinery_install_dir>/data/users/authfilter.log`.

On UNIX you can create this file manually (using an application such as vi), with the permissions set so that o (other) has +rw (read and write) privileges, for example:

```
vi /u1/work/idctest1/data/users/authfilter.log
```

(Add some information, save, and exit.)

```
chmod o+rw /u1/work/idctest1/data/users/authfilter.log
```

Turning Off “Canonical” Names

Your refineries might use an IP address or an address that is different from the physical server they are running on (i.e., the *HttpServerAddress* variable is defined in Inbound Refinery’s *config.cfg* file). If that is the case, it is a good idea to turn off “canonical” names. With this setting turned on, whenever Apache needs to construct a self-referencing URL (i.e., a URL that refers back to the server the response is coming from), it will use ServerName and Port to form a “canonical” name. With this setting turned off, Apache will use the hostname:port that the client supplied (if possible). This eliminates double login prompts.

To turn “canonical” names off, make sure the *httpd.conf* file includes the following line:

```
UseCanonicalName Off
```

(Please note that on UNIX the default setting is ‘On’.)

UNINSTALLING INBOUND REFINERY

OVERVIEW

There are different ways to uninstall a refinery:

- ❖ [Uninstalling Inbound Refinery on Windows Using the Command Line](#) (page C-2)
- ❖ [Uninstalling Inbound Refinery on Windows Manually](#) (page C-3)
- ❖ [Uninstalling Inbound Refinery on UNIX](#) (page C-4)



Important: When uninstalling on Windows, do not use the Add/Remove Programs applet in Control Panel to uninstall a refinery. It does not perform a complete uninstall.

UNINSTALLING INBOUND REFINERY ON WINDOWS USING THE COMMAND LINE

To uninstall a refinery on Windows using the command line, complete the following steps:

1. Open a command prompt window and navigate to the *bin* directory of the refinery that you want to uninstall, for example *c:\ibr\idcm1\bin*.



Caution: Make absolutely sure that you go to the *bin* directory of the correct refinery. Otherwise you might unintentionally uninstall the wrong refinery.

2. Enter `Installer RefineryUnregisterAll` and press [Enter].
3. The uninstaller now executes the following tasks:
 - It removes the refinery shortcuts from the Start menu.
 - It removes the refinery entries in the Windows Registry.
 - It removes the configuration of IIS (if applicable).
4. Remove the installation directory of the refinery (for example *c:\ucm\ref1*).
5. Remove the web server used by the refinery. It is recommended that only system administrators perform this action.
6. If desired, disable and uninstall the `InboundRefinerySupport` component on any content servers using either Component Manager or Component Wizard.



Note: After you have uninstalled the Inbound Refinery software, some shortcuts might still be in cache memory. This might cause the shortcut to be displayed, but no longer be functional. If this happens, simply log out of Windows and log back in. The shortcuts are then no longer displayed.



Note: The Windows Registry of each machine running Inbound Refinery will still contain an entry called `HKEY_LOCAL_MACHINE\SOFTWARE\Stellent`. This registry entry was created automatically by the ISAPI filter. It is completely harmless, but can be removed if desired.

UNINSTALLING INBOUND REFINERY ON WINDOWS MANUALLY

It is recommended that you uninstall refineries from the command line (see page C-2). However, there might be situations where a manual uninstallation of the Inbound Refinery software might be required. To accomplish this, complete the following steps:



Caution: The following procedure removes *all* refineries from the computer!

1. Stop all IDC services and the web server:
 - a. Launch the Windows services manager.
 - b. Stop all Inbound Refinery, Admin Server, and web server services.
2. If you were using IIS, remove the ISAPI filter and delete the virtual directories:
 - a. Launch the Internet Information Service Manager.
 - b. Select the Default Web Site, right-click, and choose **Properties** from the popup menu.
 - c. Open the ISAPI Filters tab.
 - d. Select each “Idc Plugin [*Refinery instance name*]” entry and click **Remove**.
 - e. Click **OK**.
 - f. Under Default Web Site, select <default web site> (i.e., ibr), right-click, and choose **Delete** from the popup menu.
 - g. **(IIS 6.0 only:)** Under Web Service Extensions, Prohibit the Web Service Extension for the “Idc Plugin...”.
3. Delete the main refinery installation directory (for example, *C:\ucm\refl*).
4. Remove the Inbound Refinery group from the Start menu.
5. Empty the recycle bin.
6. Run Regedit and do the following:
 - a. Delete the following registry key:
 - HKEY_LOCAL_MACHINE\SOFTWARE\Intranet (this key might be empty)
 - HKEY_LOCAL_MACHINE\SOFTWARE\Stellent

- b. Delete the following registry keys for each refinery:
 - HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\IcdAdminService[instance_name]_admin
 - HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\IcdRefineryService[instance_name]
7. Reboot the Inbound Refinery host machine.
8. If desired, disable and uninstall the InboundRefinerySupport component on any content servers using either Component Manager or Component Wizard.

UNINSTALLING INBOUND REFINERY ON UNIX

To uninstall a refinery from a UNIX computer, complete the following steps:

1. Stop the refinery server if it is running.
2. Stop the Admin Server, if it is present on the refinery host machine and running.
3. Remove the directory of the refinery (for example */u1/apps/ucm/ref1*).
4. Remove the web server used by the refinery. It is recommended that only system administrators perform this action.
5. If a command was included in the autostart scripts to start the refinery, remove this command.
6. If desired, disable and uninstall the InboundRefinerySupport component on any content servers using either Component Manager or Component Wizard.

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ZLIB LICENSE

* zlib.h -- interface of the 'zlib' general purpose compression library
version 1.2.3, July 18th, 2005

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