BEA AquaLogic® Interaction Collaboration

Installation and Upgrade Guide

Version 4.2 MP1
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Contents

4. Installation

CHAPTER 1

Welcome

This book describes the procedures required to install, upgrade, and perform basic configuration of BEA AquaLogic Interaction Collaboration (“Collaboration”).

How To Use This Book

This guide has been designed to be used by Collaboration administrators and developers. It has been organized to be a quick reference for experienced Collaboration installers, while also providing detailed instructions for those installing for the first time.

Audience

It is expected that the user of this guide has strong knowledge of the platform operating system, database, web and application servers, and any other third-party software required for the Collaboration installation.

Organization

- This chapter provides information on how to use this guide, and other resources available to help install, deploy, upgrade, and administer the Collaboration components.
- Chapter 2, “Installation Prerequisites,” provides hardware and software requirements, as well as environmental and third-party software prerequisites. This chapter must be read and prerequisites must be met prior to proceeding to the installation or upgrade.

- Chapter 3, "QuickStart Overview," provides a high level overview of the Collaboration installation and upgrade procedures. Sufficient detail is provided to allow an experienced Collaboration administrator to quickly install or upgrade Collaboration. Cross-references link the high level tasks to detailed procedures in other chapters.
- Chapter 4, "Installation," provides detailed instructions for the installation and configuration of Collaboration.
- Chapter 5, "Upgrade," provides detailed instructions for upgrading to Collaboration 4.2 MP1.

Typographical Conventions

This book uses the following typographical conventions.

Table 1-1 Typographical Conventions

Convention	Typeface	Example
File names Folder names Screen elements	**bold**	• Upload **Procedures.doc** to the portal. • Open the **General** folder. • To save your changes, click **Apply Changes**.
Text you enter	`computer`	• Type `Marketing` as the name of your community.
Variables you enter	*`italic computer`*	• Enter the base URL for the Portlet Server. For example, `http://my_computer/`.
New terms Emphasis Portal object example names	*italic*	• *Portlets* are Web tools, embedded in your portal. • The URI *must* be a unique number. • The example Knowledge Directory displayed in Figure 5 shows the *Human Resources* folder.

BEA Documentation and Resources

The tables in this section list other documentation and resources provided by BEA.

Table 1-2 Documentation

Resource	Description
Installation Worksheet	This worksheet helps you to gather and record prerequisite information necessary for installing BEA AquaLogic Interaction Collaboration. It is available on edocs.bea.com/alui/collaboration/docs42.
Administrator Guide	This book describes how to perform management and maintenance of Collaboration. It is available on edocs.bea.com/alui/collaboration/docs42.
Release Notes	These files are written for Collaboration administrators. They include information about new features and known issues in the release. They are available on edocs.bea.com/alui/collaboorati/docs42 and on any physical media provided for delivering the application.
Deployment Guide	This document is written for business analysts and system administrators. It describes how to plan your AquaLogic User Interaction deployment. It is available on edocs.bea.com/alui/deployment/index.html.
Online Help	The online help is written for all levels of Collaboration users. It describes the user interface for Collaboration and gives detailed instructions for completing tasks in Collaboration. To access online help, click the help icon.

Table 1-3 Other BEA Resources

Resource	Description
Developer Guides, Articles, API Documentation, Blogs, Newsgroups, and Sample Code	These resources are provided for developers on the BEA dev2dev site (dev2dev.bea.com). They describe how to build custom applications using AquaLogic User Interaction and how to customize AquaLogic User Interaction products and features.

Table 1-3 Other BEA Resources

Resource	Description
AquaLogic User Interaction Support Center	The AquaLogic User Interaction Support Center is a comprehensive repository for technical information on AquaLogic User Interaction products. From the Support Center, you can access products and documentation, search knowledge base articles, read the latest news and information, participate in a support community, get training, and find tools to meet most of your AquaLogic User Interaction-related needs. The Support Center encompasses the following communities: **Technical Support Center** Submit and track support incidents and feature requests, search the knowledge base, access documentation, and download service packs and hotfixes. **User Group** Visit the User Group section to collaborate with peers and view upcoming meetings. **Product Center** Download products, read Release Notes, access recent product documentation, and view interoperability information. **Developer Center** Download developer tools and documentation, get help with your development project, and interact with other developers via BEA's dev2dev Newsgroups. **Education Services** Find information about available training courses, purchase training credits, and register for upcoming classes. If you do not see the Support Center when you log in to http://support.plumtree.com, contact ALUIsupport@bea.com for the appropriate access privileges.
Technical Support	If you cannot resolve an issue using the above resources, BEA Technical Support is happy to assist. Our staff is available 24 hours a day, 7 days a week to handle all your technical support needs. E-mail: ALUIsupport@bea.com Phone Numbers: U.S.A. +1 866.262.PLUM (7586) or +1 415.263.1696 Europe +44 1494 559127 Australia/NZ +61 2.9923.4030 Asia Pacific +61 2.9931.7822 Singapore +1 800.1811.202

CHAPTER 2

Installation Prerequisites

Complete the following basic steps to prepare your network and host computers for deployment:

1. Download the most up-to-date documentation from edocs.bea.com.
2. Read the product release notes for information on compatibility issues, known problems, and workarounds that might affect how you proceed with your deployment. Release notes are located at the top-level directory of the product package.
3. Print the configuration worksheets provided in the Collaboration Installation Worksheet document: **Collaboration_Installation_Worksheet.pdf**.
4. Determine the values you have assigned for this deployment, and record these values in the Collaboration Installation Worksheet document.
5. Provision host computers for your deployment and install prerequisite software. For details, see "Hardware and Software Requirements" on page 2-2.

Hardware and Software Requirements

The following table lists the software requirements for Collaboration. For more information on recommended configurations based on the size of your implementation, see the *Deployment Guide for BEA AquaLogic User Interaction G6.*

Caution: IPv6 is not supported. You should verify that IPv6 is not enabled prior to installing this product.

Table 2-1 Hardware and Software Requirements

Component	Requirement
Collaboration Host Computer	• Microsoft Windows 2003 SP1 • Red Hat Enterprise Linux 4.0 Update 3 (ES & AS), on x86 • SUSE Enterprise Linux 9, on x86 • AIX 5.3, on POWER3, POWER4, POWER5 • Solaris 8, 9, or 10 on SPARC • HPUX 11i v2 (Itanium 32-bit)
Database Server Host Computer	• **(Windows only)** Microsoft SQL Server 2000 SP3a, Microsoft SQL Server 2000 SP4, Microsoft SQL Server 2005 (in 2000 Compatibility Mode) • Oracle 9i (9.2.0.4, 9.2.0.5, 9.2.0.6, 9.2.0.7) in default or Oracle RAC configuration • Oracle 10g (10.1.0.3 or 10.2.0.x) in default or Oracle RAC configuration **Note:** If you are upgrading Oracle from 10.1.x to 10.2.x or SQL Server from 2000 to 2005, you should perform this upgrade before upgrading Collaboration.
Portal	• BEA AquaLogic Interaction 6.1 MP1
Browser	• Internet Explorer 6.x, Internet Explorer 7.0 • Netscape 7.2, Netscape 8 • Safari 2.0 (Mac - Simple Mode only) • Firefox 1.5, Firefox 2.0
Groupware Servers	• Microsoft Exchange 2000 SP3 (and higher) • Microsoft Exchange 2003 • Lotus Notes 5.0.11

Table 2-1 Hardware and Software Requirements

Component	Requirement
Required Software for Exchange Integration	• Microsoft.NET • Microsoft Web Services Enhancement
Microsoft Project	• Microsoft Project 2000 • Microsoft Project 2003
Microsoft Office (for Collaboration Office Tools Add-in functionality)	• Microsoft Office 2000 on Windows XP SP2 • Microsoft Office XP on Windows XP SP2 • Microsoft Office 2003 on Windows XP SP2 • Microsoft Office 2007 on Windows XP SP2

CHAPTER 3

QuickStart Overview

This chapter provides brief, high level instructions for the installation and upgrade of Collaboration, and is intended to quickly guide experienced administrators through the installation or upgrade procedure.

This chapter is divided into two major sections:

- Installation. This section covers installing the Collaboration components, scripting the database, and starting and verifying the installation. The organization of this section maps directly to detailed instructions in Chapter 4, “Installation”.
- Upgrade. This section covers upgrading version of Collaboration to the latest version. The organization of this section maps directly to detailed instructions in Chapter 5, “Upgrade”.

Installation

Before installing Collaboration, verify that your portal is working correctly including the Search Service, Image Service, Document Repository Service, API Service, Automation Service, and ALI Logging Utilities. For more information on installing and configuring AquaLogic Interaction, see *Installation and Upgrade Guide for BEA AquaLogic Interaction.*

Creating the Collaboration Database

This section describes creating the Collaboration database. Perform the procedure that is appropriate to your database platform. For more complete details on performing this task, see “Creating the Collaboration Database” on page 4-2.

Note: Collaboration for UNIX/Linux only supports Oracle.

Creating the Collaboration Database (SQL Server)

Before performing these steps, ensure that you have a SQL Server portal database that is working correctly. To complete these steps, you must be the database administrator for the portal database.

Note: The Collaboration and portal databases must be the same vendor and version and they must reside on the same physical machine.

1. Ensure that the SQL Server Service Manager is running.
2. Perform one of the following:
   - **(SQL Server 2000)** Open the SQL Server Enterprise Manager.
   - **(SQL Server 2005)** Open SQL Server Management Studio.
3. **(SQL Server 2005)** Configure the SQL Server instance to use **SQL Server and Windows Authentication mode**.
4. Create the Collaboration database.

   (SQL Server 2005) Configure the Collaboration database to use **SQL Server 2000 (80) compatibility level**.
5. Create the Collaboration database user:
   a. Add a login ID and password for the Collaboration database, using SQL Server Authentication.
   b. Set the default database as the Collaboration database.
   c. Perform one of the following:
   - **(SQL Server 2000)** Grant the Collaboration user access to and ownership of the Collaboration database.
   - **(SQL Server 2005)** Grant the Collaboration database user the **sysadmin** server role.
6. **(SQL Server 2005)** In the Object Explorer, expand the Collaboration database and right-click on the Security folder. Select New, Schema. In the Schema Name field, type the name of the Collaboration database user. *Note that the schema name must exactly match the name of the* Collaboration *database user.* Click the **Search** button and browse for the name of the Collaboration database user. Then click **OK**. In the Object Explorer, expand the Users folder, which is under the Security folder. Right-click on the Collaboration database user and select Properties. In the Database User window, User Mapping page, click the **...** button to the right

of the Default Schema name to launch the Select Schema dialog box. Browse for the schema that you created; this name should match the Collaboration database user name. Click **OK** to close the Select Schema dialog box, then click **OK** to close the Database User dialog box.

7. Perform one of the following:
   - **(SQL Server 2000)** Close the Enterprise Manager.
   - **(SQL Server 2005)** Close SQL Server Management Studio.

Creating the Collaboration Database (Oracle)

Before installing Collaboration ensure that you have a correctly installed and configured Oracle portal database.

Note: The Collaboration and portal databases must be the same vendor and version and they must reside on the same physical machine.

Collaboration does not use its own Oracle database. Instead, the Collaboration schema is added to the existing Oracle tablespace that contains the portal schema. The Collaboration schema will be scripted after the installer is run.

Before proceeding with the Collaboration installation, confirm that the **`open_cursors`** parameter in the Oracle initialization file is set to greater than 1000. This parameter should have been set correctly during the portal database set up.

Preparing for Microsoft Exchange Integration (Windows Only)

If you are going to integrate Collaboration with Microsoft Exchange, you must prepare the system before running the Exchange Remote API installer. For details on running the Exchange Remote API installer, see "Installing the Exchange Remote API to Enable Groupware Integration" on page A-1.

To prepare for Microsoft Exchange integration:

1. Configure IIS. For details, see Appendix B, "Configuring and Verifying IIS."
2. Install the Microsoft .NET 1.1 Framework.

   This must be downloaded from the Microsoft Web site (http://www.microsoft.com/).
3. Install Microsoft Web Services Enhancement 2.0.

   This must be downloaded from the Microsoft Web site (http://www.microsoft.com/).

The .NET Framework and the Web Services Enhancement must be installed on the same machine running the groupware integration for Collaboration.

Running the Installer

For more complete details on performing this task, see "Running the Installer" on page 4-5.

To install Collaboration, you must have administrator rights on the machine where you are running the installer. Additionally, you must have administrator privileges for the portal database.

To install Collaboration:

1. Launch the Collaboration installer by performing the following:
   - **(Windows)** Locate and double-click the installation file: ALICollaboration_v4-2_MP1.exe
   - **(UNIX/Linux)** Enter the following command lines to locate and launch the installer:

     cd <*installer_file_path*>

     ./ALICollaboration_v4-2_MP1
2. **(Windows Only)** Restart the computer.

Scripting the Portal and Collaboration Databases

After the Collaboration installer has completed the installation, you must script the portal and Collaboration databases. Perform the procedure that is appropriate to your database platform. For more complete details on performing this task, see "Scripting the Portal and Collaboration Databases" on page 4-13.

Configuring MS SQL Server (Windows Only)

This section describes how to create and configure the Collaboration database schema, as well as configure the portal database schema for Collaboration. For more complete details on performing this task, see "Configuring MS SQL Server (Windows Only)" on page 4-13.

The following table describes the scripts that you use to perform this task:

Table 3-1 Scripts for Creating and Configuring SQL Server Database Schemas for Collaboration

Script Function	Name	Database / ID
Configure Collaboration database schema	collaboration-server-create-tables.sql collaboration-server-data.sql collaboration-server-portal-role-grant.sql	Collaboration database / Collaboration database ID
Configure portal database schema	portal-collaboration-server-role-grant.sql portal-collaboration-server-data.sql	portal database / portal database user ID

The scripts are located in:

<PT_HOME>\ptcollab\4.2\sql\6.1\MSSQLServer

By default, the PT_HOME directory is: **C:\bea\alui**. However, if you upgraded to Collaboration 4.2, PT_HOME is the same as in the previously installed version of Collaboration.

To run the scripts for configuring the Collaboration database schema, connect to SQL Server and log in as the Collaboration database user. Run the scripts on the Collaboration database in the order listed in Table 3-1.

To run the scripts for configuring the portal database schema, connect to the portal database as the portal database user. Run the scripts on the portal database in the order listed in Table 3-1.

Configuring Oracle

This section describes how to create and configure the Collaboration database schema, as well as configure the portal database schema for Collaboration. For more complete details on performing this task, see "Configuring Oracle" on page 4-15.

The following table describes the scripts that you use to perform this task:

Table 3-2 Scripts for Creating and Configuring Oracle Database Schemas for Collaboration

Script Function	Name	Database / ID
Create Collaboration database schema	collaboration-server-create-table-space.sql collaboration-server-create-user.sql	Collaboration database / Collaboration database ID

Table 3-2 Scripts for Creating and Configuring Oracle Database Schemas for Collaboration

Script Function	Name	Database / ID
Configure Collaboration database schema	collaboration-server-create-tables.sql collaboration-server-data.sql collaboration-server-portal-role-grant.sql	Collaboration database / Collaboration database ID
Configure portal database schema	portal-collaboration-server-role-grant.sql portal-collaboration-server-data.sql	portal database / portal database user ID

Performing Post-Installation Procedures

For more complete details on performing these tasks, see "Performing Post-Installation Procedures" on page 4-17.

This section describes the procedures you must perform after scripting the portal and Collaboration databases. You should perform the procedures in this order:

1. Importing the Collaboration Migration Package
2. Starting the Notification Service
3. Starting Collaboration
4. Configuring Optional Collaboration Features
5. Setting Up Collaboration Logging

Importing the Collaboration Migration Package

This section describes how to import the Collaboration migration package. Perform the procedure that is appropriate to your operating system.

Importing the Migration Package (Windows)

To import the migration package in Windows, log on to the portal and import the Collaboration migration package using the Migration Wizard. The filename of the migration package is **Collaboration6.pte**.

Importing the Migration Package (UNIX/Linux)

To import the migration package in UNIX/Linux, log on to the portal and import the **Collaboration6.pte** file, located in:

<PT_HOME>/ptcollab/4.2/serverpackages/6.1

Starting the Notification Service

This section describes how to start the Notification Service. Perform the procedure that is appropriate to your operating system. For more complete details on performing this task, see "Starting the Notification Service" on page 4-19.

Starting the Notification Service on Windows

To start the Notification service on Windows, locate and start the BEA ALI Notification service.

Starting the Notification Service on UNIX/Linux

To start the Notification Service on UNIX/Linux, run the **ptnotificationserverd.sh** script with the **start** argument. This script is located in the **/opt/bea/alui/ptnotification/4.2/bin** directory.

Starting Collaboration

This section describes how to start Collaboration on Windows and UNIX/Linux.

Starting Collaboration on Windows

To start Collaboration on Windows:

1. Reboot the computer where Collaboration is installed if you have not done so since running the installer.
2. Start the Windows service named **BEA ALI Collaboration**.
3. Verify that Collaboration is functioning correctly by accessing and analyzing the Collaboration Diagnostics page:

   http://<your-collab-URL>:<your-collab-port>/collab/admin/diagnostic

Starting Collaboration on UNIX/Linux

To start Collaboration on UNIX/Linux:

1. Run the **ptcollaborationserverd.sh** script with the **start** argument. This script is found in the **/opt/bea/alui/ptcollab/4.2/bin** directory.
2. Verify that Collaboration is functioning correctly by accessing and analyzing the Collaboration Diagnostics page:

   http://<your-collab-URL>:<your-collab-port>/collab/admin/diagnostic

Configuring Optional Collaboration Features

The following optional features require additional configuration and setup after you have run the installer:

- Personal Projects
- Bulk Upload
- Groupware Integration
- Publish to Knowledge Directory

For more information on configuring these features, see *Administrator Guide for BEA AquaLogic Interaction Collaboration*.

Setting Up Collaboration Logging

For AquaLogic Interaction 6.x, you have the option to set up Collaboration Logging. This includes setting up Logging Utilities and configuring ALI Logging Spy to display Collaboration messages. For more information on setting up Collaboration Logging, refer to the *Administrator Guide for BEA AquaLogic Interaction Collaboration*.

Upgrade

For more complete details on upgrading Collaboration, see "Upgrade" on page 5-1.

Note: If you are upgrading Oracle from 10.1.x to 10.2.x or SQL Server from 2000 to 2005, you should perform the Oracle or SQL Server upgrade before upgrading Collaboration.

Running the Installer During Upgrade

For more complete details on performing this task, see "Running the Installer During Upgrade" on page 5-3.

To run the installer during upgrade:

1. Backup the portal and Collaboration databases and the Document Repository Service.
2. Stop the BEA ALI Collaboration service, Notification Service, Search Service, Automation Service, and Document Repository Service.
3. Clear the embedded application server's work directory. By default, this directory is located in:

- **(Windows)** C:\bea\alui\common\container\tomcat\<version>\work
- **(UNIX/Linux)** /opt/bea/alui/common/container/tomcat/<version>/work

4. Copy the installer files to the directory where you have installed the old versions of the Collaboration files.
5. On the machine hosting the previous version of Collaboration, run the installer and choose the following components:
   - Collaboration
   - Notification Service
6. Run the Collaboration installer on the machine on which you installed the portal's Image Service. Choose the Image Service Files component.
7. **(Windows only)** Reboot the machine on which Collaboration is installed.

Upgrading the Portal and Collaboration Databases

This section describes updating the portal and Collaboration databases. Perform the procedure that is appropriate to your database platform.

Note: You must upgrade both the portal and Collaboration databases. Additionally, both databases must reside on the same computer.

Upgrading Oracle Databases

Assuming that you installed the Collaboration files in the default location, the Oracle upgrade script files are located on the Collaboration computer.

To upgrade Oracle databases:

1. Copy the Collaboration database upgrade scripts from the default installation location to an Oracle folder or subdirectory on the computer where the database resides. The scripts are located in one of the following paths:
   - **(Windows)** <PT_HOME>\ptcollab\4.2\sql\6.1\Oracle\OracleNT9.2 **OR** <PT_HOME>\ptcollab\4.2\sql\6.1\Oracle\OracleNT10
   - **(UNIX/Linux)** <PT_HOME>\ptcollab\4.2\sql\6.1\Oracle\OracleUnix9.2 OR <PT_HOME>/ptcollab/4.2/sql/6.1/Oracle/OracleUnix10
2. Ensure that you have installed the latest Oracle patches.
3. Configure the database to archive log files if you are upgrading in a production environment.

4. Shut down the database to get a read-consistent backup.
5. Using SQLPlus and the Collaboration database server schema user ID and password, run the upgrade script that is appropriate to your upgrade path:
   - **collaboration-server-4-0-2-to-4-1-0-upgrade.sql**
   - **collaboration-server-4.1.1-to-4.1.2-upgrade.sql**
   - **collaboration-server-4.1.2-to-4.2.1-upgrade.sql**

   Note: If you are performing multiple upgrades, run the upgrade scripts in the order listed in "Upgrade Paths" on page 5-2.
6. Run the **collaboration-server-portal-role-grant.sql** script.
7. Using SQLPlus and the portal database server schema user ID and password, run the following:
   - **portal-collaboration-server-data.sql**
   - **portal-collaboration-server-role-grant.sql**
   - **portal-collaboration-server-upgrade.sql**

Upgrading SQL Server Databases (Windows Only)

Assuming that you installed the Collaboration files in the default location, the MS SQL Server 2000 upgrade script files are located on the Collaboration computer. These scripts are located in:

<PT_HOME>\ptcollab\4.2\sql\6.1\MSSQLServer

To upgrade SQL Server databases:

1. Run **Query Analyzer**.
2. Open, then run the following script files on the Collaboration database as the Collaboration database user:
   - **collaboration-server-4-0-2-to-4-1-0-upgrade.sql**
   - **collaboration-server-4.1.1-to-4.1.2-upgrade.sql**
   - **collaboration-server-4.1.2-to-4.2.1-upgrade.sql**
   - **collaboration-server-portal-role-grant.sql**

   Note: If you are performing multiple upgrades, run the upgrade scripts in the order listed in "Upgrade Paths" on page 5-2.

3. Open, then run the following script files on the portal database as the portal database user:
   - **portal-collaboration-server-role-grant.sql**
   - **portal-collaboration-server-data.sql**
   - **portal-collaboration-server-upgrade.sql**
4. Close Query Analyzer.

Post-Upgrade Procedures

This section lists, in order, additional procedures that you must perform after upgrading the portal and Collaboration databases.

For more complete details on performing this task, see "Post-Upgrade Procedures" on page 5-6.

1. Import the migration package.
2. If you have set Collaboration to manually capture portal gateway values you must change the Web Service ID being used. It must be set to the WebService ID of the Notification Gateway Entry, which can be found in Collaboration Administration's Portal Access page.
3. Start the Notification Service.
4. Start Collaboration.
5. If desired, configure the following advanced Collaboration features:
   - Personal Projects
   - Bulk Upload
   - Groupware Integration
   - Publish to Knowledge Directory
6. For more information on configuring these features, see *Administrator Guide for BEA AquaLogic Interaction Collaboration*.
7. Verify that Collaboration is functioning correctly by accessing and analyzing the Collaboration Diagnostics page:

   http://<your-collab-URL>:<your-collab-port>/collab/admin/diagnostic
8. Rebuild the Search Collection.

CHAPTER 4

Installation

This chapter describes how to install Collaboration. If you are upgrading from an earlier version, refer first to "Upgrade" on page 5-1.

To install Collaboration:

1. Ensure that you have met the prerequisites for installation. For details, see "Installation Prerequisites" on page 2-1.
2. **(Windows Only/Optional)** Prepare for Microsoft Exchange integration. For details, see "Preparing the System for Microsoft Exchange Integration (Windows Only)" on page 4-2.
3. Install the Collaboration application. For details, see "Installing Collaboration" on page 4-2.
4. Script the portal and Collaboration databases. For details, see "Scripting the Portal and Collaboration Databases" on page 4-13.
5. Perform post-installation procedures. For details, see "Performing Post-Installation Procedures" on page 4-17.

Preparing the System for Microsoft Exchange Integration (Windows Only)

If you are going to integrate Collaboration with Microsoft Exchange, you must prepare the system before running the Exchange Remote API installer. For details on running the Exchange Remote API installer, see "Installing the Exchange Remote API to Enable Groupware Integration" on page A-1.

To prepare for Microsoft Exchange integration:

1. Configure IIS. For details, see Appendix B, "Configuring and Verifying IIS."
2. Install the Microsoft .NET 1.1 Framework.

   This must be downloaded from the Microsoft Web site (http://www.microsoft.com/).
3. Install Microsoft Web Services Enhancement 2.0.

   This must be downloaded from the Microsoft Web site (http://www.microsoft.com/).

The .NET Framework and the Web Services Enhancement must be installed on the same machine that is hosting Microsoft Exchange.

Installing Collaboration

Before installing Collaboration, verify that your portal is working correctly including the Search Service, Image Service, Document Repository Service, API Service, Automation Service, and ALI Logging Utilities. For more information on installing and configuring AquaLogic Interaction, see *Installation and Upgrade Guide for BEA AquaLogic Interaction.*

Creating the Collaboration Database

This section describes creating the Collaboration database. Perform the procedure that is appropriate to your database platform.

Note: Collaboration for UNIX/Linux only supports Oracle.

Creating the Collaboration Database (SQL Server)

Before performing these steps, ensure that you have a SQL Server portal database that is working correctly. To complete these steps, you must be the database administrator for the portal database.

Note: The Collaboration and portal databases must be the same vendor and version and they must reside on the same physical machine.

1. Ensure that the SQL Server Service Manager is running.
2. Perform one of the following
   - **(SQL Server 2000)** Open the SQL Server Enterprise Manager.
   - **(SQL Server 2005)** Open SQL Server Management Studio.
3. **(SQL Server 2005)** Configure the SQL Server instance to use **SQL Server and Windows Authentication mode**.
4. Create the Collaboration database:
   a. Select the database server where you want to create the Collaboration database.
   b. Right-click the database folder.
   c. Choose **New Database.**
   d. Enter a database name.

      Collaboration does not support case-sensitive database names.
   e. **(SQL Server 2005)** Configure the Collaboration database to use **SQL Server 2000 (80) compatibility level**.
   f. Click **OK**.
5. Create the Collaboration database user:
   a. Open the **Security** folder.
   b. Right-click the **Logins** folder and choose **New Login**.
   c. Specify a user ID for the new user. This is the same user ID you will specify during the Collaboration installation.
   d. In the Authentication area of this dialog box, choose **SQL Server Authentication** and type a password. You must specify this password during Collaboration installation.
   e. In the **Defaults** area, set the default database to be the Collaboration database that you just created.
   f. Perform one of the following:

- **(SQL Server 2000)** Click the **Database Access** tab. In the **Specify which databases can be accessed by this login** box, select the Collaboration database. In the **Database roles for** <Collaboration **database**> box, select **db_owner** (**public** is already selected) and click **OK**.
- **(SQL Server 2005)** Grant the Collaboration database user the **sysadmin** server role.

6. **(SQL Server 2005)** Perform the following:
   a. In the Object Explorer, expand the Collaboration database and right-click on the **Security** folder.
   b. Select **New, Schema**.
   c. In the **Schema Name** field, type the name of the Collaboration database user.

      Note: The schema name must exactly match the name of the Collaboration database user.

   d. Click the **Search** button and browse for the name of the Collaboration database user.
   e. Click **OK**.
   f. In the Object Explorer, expand the **Users** folder, which is under the Security folder.
   g. Right-click on the Collaboration database user and select **Properties**.
   h. In the Database User window, User Mapping page, click the **...** button to the right of the Default Schema name to launch the Select Schema dialog box.
   i. Browse for the schema that you created; this name should match the Collaboration database user name.
   j. Click **OK** to close the Select Schema dialog box.
   k. Click **OK** to close the Database User dialog box.
7. Perform one of the following:
   – **(SQL Server 2000)** Close the Enterprise Manager.
   – **(SQL Server 2005)** Close SQL Server Management Studio.

Creating the Collaboration Database (Oracle)

Before installing Collaboration ensure that you have a correctly installed and configured Oracle portal database.

Note: The Collaboration and portal databases must be the same vendor and version and they must reside on the same physical machine.

Collaboration does not use its own Oracle database. Instead, the Collaboration schema are added to the existing Oracle database that contains the portal schema.

Before proceeding with the Collaboration installation, confirm that the **`open_cursors`** parameter in the Oracle initialization file is set to greater than 1000. This parameter should have been set correctly during the portal database set up.

Running the Installer

This section describes how to install Collaboration.

Note: If you have previously run the installer and a properties file has been created, you may run the installer silently based on the values in the file. Refer to "Silent Properties File" on page C-1 for information on how to run a silent install.

To install Collaboration, you must have administrator rights on the machine where you are running the installer. Additionally, you must have administrator privileges for the portal database.

To install Collaboration:

1. Launch the Collaboration installer by performing the following:
   - **Windows:** Locate and double-click the installation file: ALICollaboration_v4-2_MP1.exe
   - **UNIX/Linux:** Enter the following command lines to locate and launch the installer:

     cd <*installer_file_path*>

     ./ALICollaboration_v4-2_MP1

2. Complete the installation wizard pages as described in the following table.

Table 4-1 Collaboration Installer Screens

Installer Screen	Description
Introduction	Provides general information on using the installer. Click **Next** to begin the installation.
Choose Components	You can choose the Collaboration components you want to install. Each component can be installed on a separate server depending on your configuration. The Collaboration components are: • **Collaboration**: This is the core Collaboration application. It is required. • **Notification**: This optional component sends e-mails from Collaboration to end-users. By subscribing to objects within Collaboration, you can receive notification when the object is updated. **Note:** The Notification component is not required for users to employ the E-mail a Project and Groupware Integration features. However the E-mail a Project feature is less useful if the Notification Service is not running. • **Image Service Files**: This required component installs the necessary images, styles, user interface controls, Java applets, and online help for Collaboration. Install these files on the same machine on which the portal's Image Service is installed. After you have chosen the components you want to install, click **Install**.
Installation Folder	The default installation folder is • **C:\bea\alui** (Windows) • **/opt/bea/alui** (UNIX/Linux) After you have entered the required information or accepted the default, click **Next**.
AquaLogic Interaction Collaboration - Application Port	Select either http or https and enter the port number. The default port number is 11930. After you have entered the required information, click **Next**.
Portal Settings: Collaboration URL	**Collaboration URL**: The URL that the portal and Notification Service use to communicate with Collaboration. You must specify a fully-qualified domain name, including the port number and path. **Note:** Do not change **/collab/** in the URL. After you have entered the required information, click **Next**.

Table 4-1 Collaboration Installer Screens

Installer Screen	Description
Portal Settings: Portal Database	Perform one of the following operating system-specific procedures: **Windows:** Collaboration makes connections and retrieves information from the portal database. Select the appropriate vendor for your portal and Collaboration database. **UNIX/Linux:** Collaboration uses the following information to establish connections with the portal database: • **Portal Database Host**: This is the hostname of the portal database server. You must specify a fully-qualified domain name. • **Portal Database Port**: The port the portal database uses to handle requests. • **Portal Database SID**: The Oracle Service ID of the portal database. • **Portal Database Schema User**: The user_id who is granted ownership of the portal schema and its tables. After you have entered the required information, click **Next**.
(Windows/SQL Server Only) Portal Settings: Portal Database	Collaboration uses the following information to establish connections with the portal database: • **Portal Host Computer**: This is the hostname of the portal database server. You must specify a fully-qualified domain name. • **Portal Database Port**: The port the portal database uses to handle requests. • **Portal Database Name**: The name of the database configured to work with your portal. • **Portal Database Login**: The user name of the portal database owner. After you have entered the required information, click **Next**.
(Windows/Oracle Only) Portal Settings: Portal Database	Collaboration uses the following information to establish connections with the portal database: • **Portal Database Host**: This is the hostname of the portal database server. You must specify a fully-qualified domain name. • **Portal Database Port**: The port the portal database uses to handle requests. • **Portal Database SID**: The Windows service name of the portal database. • **Portal Database Schema User**: The user_id who is granted ownership of the portal schema and its tables. After you have entered the required information, click **Next**.

Table 4-1 Collaboration Installer Screens

Installer Screen	Description
Portal Settings: Authentication ID	To establish secure communication between the portal and Collaboration, you must specify an authentication ID and password: • **Authentication ID**: The portal uses the authentication ID to access resources on the machine which Collaboration is installed. • **Authentication Password**: This is the authentication password. This field cannot be left blank. After you have entered the required information, click **Next**.
Portal Settings: Document Repository Service	The Document Repository Service is a portal component that manages storage and retrieval of documents for Collaboration and other AquaLogic Interaction products. • **Document Repository Service Host**: The hostname of the Document Repository Service. You must specify a fully-qualified domain name. • **Document Repository Service Port**: The port the Document Repository Service uses to handle requests. The default port is 8020. After you have entered the required information, click **Next**.
Portal Settings: Search	The Search Service is a component of the portal that provides search functionality to the portal and Collaboration. You must use the same hostname and port used by the portal. • **Search Host Computer**: The hostname of Search Service. You must specify a fully-qualified domain name. • **Search Port**: The port that the Search Service uses to handle requests. The default value is 15250. After you have entered the required information, click **Next**.
Image Service URL	• **Image Service URL**: (This screen only appears if you chose to install the Image Service Files component) The URL of the Image Service. You must enter the full URL, including the domain name, port number, and path. The Notification Service uses this URL to communicate with the Image Service. After you have entered the required information, click **Next**.

Table 4-1 Collaboration Installer Screens

Installer Screen	Description
Portal Settings: Image Service Directory	• **Image Service Directory**: This is the directory of the portal server where the Image Service files are installed. UNIX/Linux example: /opt/bea/alui/ptimages Windows example: C:\bea\alui\ptimages **Note:** Before clicking **Next**, ensure that security for the Image Service directory is appropriately configured to allow for installation of the Image Service files. After you have entered the required information, click **Next**.
(UNIX/Linux Only) Collaboration: Database Connection	Enter the following configuration information for the Collaboration database: • **Collaboration Schema User**: The user ID who is granted ownership of the Collaboration schema and its tables. • **Collaboration Schema Password**: The password of the Collaboration database schema user. After you have entered the required information, click **Next**.
(Windows/SQL Server Only) Collaboration: Database Connection	Enter the following configuration information for the Collaboration database: • **Collaboration Database Name**: The database name for the Collaboration database. • **Collaboration Database Login**: The Collaboration database owner ID. • **Collaboration Database Password**: The Collaboration database password. After you have entered the required information, click **Next**.
(Windows/Oracle Only) Collaboration: Database Connection	Enter the following configuration information for the Collaboration database: • **Collaboration Schema User**: The user ID who is granted ownership of the portal schema and its tables. • **Collaboration Schema Password**: The password of the Collaboration database schema user. After you have entered the required information, click **Next**.

Table 4-1 Collaboration Installer Screens

Installer Screen	Description
Collaboration: Advanced Features	This screen lets you install the following optional advanced features of Collaboration: **Bulk Upload**: This feature allows you to simultaneously upload multiple files and folders to Collaboration. This feature uses a Java applet installed on the client's computer which requires the Java Runtime Environment. To use this feature, you must configure certain client browser security. See *Administrator Guide for BEA AquaLogic Interaction Collaboration* for more information on client changes that you must perform after installing Collaboration. **WebDAV Service**: The Web-based Document Authoring and Versioning (WebDAV) protocol is an extension to the HTTP protocol that allows for easier document management. You must install WebDAV to use the WebEdit and Map a Web Folder features. For more information on these features, see *Administrator Guide for BEA AquaLogic Interaction Collaboration*. **Microsoft Exchange Integration**: **(Windows Only)** This option allows users to synchronize personal Collaboration calendars with their Microsoft Exchange calendar to use Groupware Integration features. To integrate Microsoft Exchange with Collaboration, you must also install the Exchange Remote API. For details, see "Installing the Exchange Remote API to Enable Groupware Integration" on page A-1. The Collaboration installer configures Groupware Integration-specific settings in config.xml. In order to do this: • Microsoft Internet Information Server (IIS) must be running • Microsoft .NET Framework must be installed • Microsoft Web Server Enhancement (WSE) must be installed **Note:** Groupware Integration is not required for users to employ the E-mail a Project feature. For details on the E-mail a Project feature, see *Administrator Guide for BEA AquaLogic Interaction Collaboration.*

Table 4-1 Collaboration Installer Screens

Installer Screen	Description
	Lotus Notes Integration: This option allows users to synchronize personal Collaboration calendars with their Lotus notes calendar to use Groupware Integration features. The Collaboration installer configures Groupware Integration-specific settings in config.xml. If you install this feature, you must perform several configuration steps after Collaboration has been installed. For more information, see *Administrator Guide for BEA AquaLogic Interaction Collaboration.* **No Groupware Integration**: Choose this option if you do not want to configure Groupware Integration at this time. If you decide to configure Groupware Integration at a later point, change the config.xml file settings for Groupware Integration appropriately at the desired time. For details on settings Groupware Integration-specific settings in config.xml, see *Administrator Guide for BEA AquaLogic Interaction Collaboration.* **Note:** Groupware Integration is not required for users to employ the E-mail a Project feature. For more details on the E-mail a Project feature, see *Administrator Guide for BEA AquaLogic Interaction Collaboration.* After you have chosen the features that you want to install, click **Next**.
(Windows Only) Collaboration: Exchange Remote API URL	The URL that the Exchange Remote API uses to communicate with Collaboration. The default value is: http://[machine]/GroupwareService/GroupwareService.asmx After you have entered the required information or accepted the default, click **Next**.
Notification: Connection Settings	**Notification Host:** The hostname of the Notification Service. **Notification Port:** The port where the Notification Service listens for requests. The default value is 9887. After you have entered the required information, click **Next**.

Table 4-1 Collaboration Installer Screens

Installer Screen	Description
Notification: e-mail Server Settings	To configure the Notification Service, enter the following: • **Mail Server Host**: The location of the mail server for your site. • **Notification E-mail Address**: The e-mail address used to send Collaboration notifications. • **Notification E-mail Name**: The notification e-mail name that appears in the "From" field of notification e-mails. **Note:** The e-mail address specified here will receive a copy of every e-mail notification sent. You may want to create an e-mail account to receive these notifications. • **SMTP Server supports e-mail relaying**: Select this check box if your SMTP server supports e-mail relaying. • **SMTP Domain List**: If your SMTP server does not support relaying, clear the **SMTP Server supports e-mail relaying** check box, and list valid e-mail domains in a comma-delimited list. After you have entered the required information, click **Next**.
Collaboration: e-mail a Project	Specify whether or not you want to enable e-mailing a project. If you enable this feature, enter the following: • **e-mail Domain:** The e-mail domain for Collaboration to use to receive e-mail messages. • **e-mail Port:** The port for Collaboration to receive e-mail messages. The default port number is 25. After you have entered the required information, click **Next**. **Note:** For instructions on how to configure the E-mail a Project feature, see *Administrator Guide for BEA AquaLogic Interaction Collaboration.*
Pre-Installation Summary	This screen provides a summary of the installation information you have provided in the installer. After you have reviewed this information and are satisfied with the values you have provided, click **Install**.
Install Complete	This screen appears after the installer has finished. You must reboot the system before continuing to the post-installation procedures. After you have made a selection, click **Finish**.

3. **(Windows Only)** Restart the computer.

Scripting the Portal and Collaboration Databases

After the Collaboration installer has completed the installation, you must script the portal and Collaboration databases. You must have administrator privileges for the portal database. Perform the procedure that is appropriate to your database platform.

Configuring MS SQL Server (Windows Only)

This section describes how to create and configure the Collaboration database schema, as well as configure the portal database schema for Collaboration. Perform the procedure that is appropriate to your version of MS SQL Server.

The following table describes the scripts that you use to perform this task:

Table 4-2 Scripts for Creating and Configuring SQL Server Database Schemas for Collaboration

Script Function	Name	Database / ID
Configure Collaboration database schema	collaboration-server-create-tables.sql collaboration-server-data.sql collaboration-server-portal-role-grant.sql	Collaboration database / Collaboration database ID
Configure portal database schema	portal-collaboration-server-role-grant.sql portal-collaboration-server-data.sql	portal database / portal database user ID

The scripts are located in:

<PT_HOME>\ptcollab\4.2\sql\6.1\MSSQLServer

By default, the PT_HOME directory is: **C:\bea\alui**. However, if you upgraded to Collaboration 4.2, PT_HOME is the same as in the previously installed version of Collaboration.

These scripts create the Collaboration-specific tables and information in the Collaboration database. They also grant rights to access necessary tables in the portal database to the Collaboration database owner.

Configuring MS SQL Server 2000

To configure MS SQL Server 2000:

1. Run Query Analyzer.
2. Connect to SQL Server and log in as the Collaboration database user.

3. Select the Collaboration database.
4. Open and run **collaboration-server-create-tables.sql**.

   This script attempts to drop tables from the database before adding new ones.
5. Open and run **collaboration-server-data.sql**.

   This script adds configuration information for the Collaboration database.
6. Open and run **collaboration-server-portal-role-grant.sql**.

   This script grants the portal database user SELECT access to the Collaboration tables.
7. Connect to the portal database as the portal database user.

   Note: Pay careful attention to this step. You must connect to the *portal* database (in previous steps of this procedure, you were running scripts on the Collaboration database).
8. Open and run **portal-collaboration-server-role-grant.sql**.

   This script grants the Collaboration database user SELECT access to the portal database tables.
9. Open and run **portal-collaboration-server-data.sql**.

   This script adds configuration information for the portal database.
10. Close Query Analyzer.
11. Restart the portal.

Configuring MS SQL 2005

To configure MS SQL Server 2005:

1. Run SQL Server Management Studio.
2. Open, then run the following script files on the Collaboration database as the Collaboration database user:
   - **collaboration-server-create-tables.sql**.
   - **collaboration-server-data.sql**.
   - **collaboration-server-portal-role-grant.sql**.
3. Open, then run the following script files on the portal database as the portal database user:
   - **portal-collaboration-server-role-grant.sql**.

– **portal-collaboration-server-data.sql**.

4. Run the script files that you opened.

Configuring Oracle

This section describes how to create and configure the Collaboration database schema, as well as configure the portal database schema for Collaboration. The following table describes the scripts that you use to perform this task:

Table 4-3 Scripts for Creating and Configuring Oracle Database Schemas for Collaboration

Script Function	Name	Database / ID
Create Collaboration database schema	collaboration-server-create-table-space.sql collaboration-server-create-user.sql	Collaboration database / Collaboration database ID
Configure Collaboration database schema	collaboration-server-create-tables.sql collaboration-server-data.sql collaboration-server-portal-role-grant.sql	Collaboration database / Collaboration database ID
Configure portal database schema	portal-collaboration-server-role-grant.sql portal-collaboration-server-data.sql	portal database / portal database user ID

These SQL scripts create the Collaboration schema and add specific tables and information. They also grant SELECT access to the Collaboration schema owner.

Note: If you are running the scripts on a local machine you do not need to include the command line **@<Oracle_SID>**, however you do need to ensure that the environment variables are set.

Perform the following procedure to run the scripts:

1. Perform the following on the portal database server:
   – Create the directory **%ORACLE_HOME%/ptcollabscripts**.
   – Copy the Collaboration database scripts from the installation location into this folder.
2. Update any required database patches.
3. If you are installing in a production environment, set up the database to archive log files. Using the default configuration, you must shut down the Oracle database to get a read-consistent backup.

4. If you want, you can change the names and locations of the COLLAB_TEMP and COLLAB_DATA tablespaces by modifying the **collaboration-server-create-table-space.sql** script. We recommend having at least two SCSI hard drives. Put each tablespace on its own hard drive.

5. By default, the Collaboration schema user name is *collab*, and the password is *collab*. You can change the schema user name and password by modifying the **collaboration-server-create-user.sql** script.

6. Use **sql*plus** to execute **collaboration-server-create-table-space.sql**. This script creates the Collaboration schema default tablespaces.

   You must log in as the system user to execute this script. Substitute the correct system password in the following command:

   ```
   sqlplus system/<system_pwd>@<ORACLE_SID>
   @collaboration-server-create-table-space.sql
   ```

7. As the system user, execute **collaboration-server-create-user.sql**. This script creates the user and password you specified during Collaboration installation. The script prompts you to enter the password again; be sure to enter the correct password.

   ```
   sqlplus system/<system_pwd>@<ORACLE_SID>
   @collaboration-server-create-user.sql
   ```

8. As the Collaboration Server user, execute **collaboration-server-create-tables.sql** to create Collaboration tables. Substitute the correct Oracle user name and password; this is the user name and password you specified during Collaboration installation:

   ```
   sqlplus <collab_user_name>/<user_pwd>@<ORACLE_SID>
   @collaboration-server-create-tables.sql
   ```

   Note: This script stops immediately on a SQL error. If this happens, resolve the problem and rerun the script.

9. As the Collaboration user, execute **collaboration-server-data.sql** to populate the Collaboration tables. Substitute the correct Oracle user name and password; this is the user name and password you specified during Collaboration installation:

   ```
   sqlplus <collab_user_name>/<user_pwd>@<ORACLE_SID>
   @collaboration-server-data.sql
   ```

10. As the Collaboration user, execute **collaboration-server-portal-role-grant.sql**. This script grants the portal schema user SELECT access to required tables in the Collaboration schema. Substitute the correct Oracle user name and password; this is the user name and password you

specified during Collaboration Server installation. The script prompts for other required passwords.

```
sqlplus <collab_user_name>/<user_pwd>@<ORACLE_SID>
@collaboration-server-portal-role-grant.sql
```

11. As the ALI user, execute **portal-collaboration-server-role-grant.sql**. This script grants the Collaboration schema user SELECT access to required tables in the portal schema. Substitute the correct portal database user name and password in the following command. The script prompts for other required passwords.

    ```
    sqlplus <portal_user_name>/<portal_pwd>@<ORACLE_SID>
    @portal-collaboration-server-role-grant.sql
    ```

12. As the ALI user, execute **portal-collaboration-server-data.sql**. This script creates views in the portal schema that allow it to see Collaboration tables. Substitute the correct portal database user name and password in the command:

    ```
    sqlplus <portal_user_name>/<portal_pwd>@<ORACLE_SID>
    @portal-collaboration-server-data.sql
    ```

13. Restart the portal.

Performing Post-Installation Procedures

This section describes the procedures you must perform after scripting the portal and Collaboration databases. You should perform the procedures in this order:

1. Importing the Collaboration Migration Package
2. Starting the Notification Service
3. Starting Collaboration
4. Configuring Optional Collaboration Features
5. Setting Up Collaboration Logging

Importing the Collaboration Migration Package

This section describes how to import the Collaboration migration package. Perform the procedure that is appropriate to your operating system.

Importing the Migration Package (Windows)

To import the migration package on Windows:

1. Log on to the portal as a user who has administrative rights.
2. Click the **Administration** tab.
3. In the **Select Utility** drop-down, select **Migration-Import** and accept the defaults.
4. In the Migration Package area, go to File Path.
5. Click Browse to find the .pte file: **Collaboration6.pte**
6. Click **Open**.
7. Click **Load Package**.
8. If you are upgrading from an earlier version of Collaboration and have changed the port number that Collaboration runs on, check **Overwrite Remote Servers**.
9. Click **Finish**.
10. A pop up dialog displays asking if you want to import. Click **Yes**.
11. The Collaboration folder is viewable in the Admin Objects Directory.
12. Click the Collaboration folder to check for the following objects:
    - Content Source
    - Group
    - Portlet
    - Property
    - Remote Server
    - Web Service

Importing the Migration Package (UNIX/Linux)

To import the migration package on UNIX/Linux.

To import the migration package:

1. Log on to the portal as a user who has administrative rights.
2. Click the **Administration** tab.

3. In the **Select Utility** drop-down, select **Migration-Import** and accept the defaults.
4. In the Migration Package area, go to **File Path**.
5. Click **Browse** to find the **Collaboration6.pte** file, located in:

   <PT_HOME>/ptcollab/4.2/serverpackages/6.1
6. Click **Open**.
7. Click **Load Package**.
8. If you are upgrading from an earlier version of Collaboration and have changed the port number that Collaboration runs on, check **Overwrite Remote Servers**.
9. Click **Finish**.
10. A pop up dialog displays asking if you want to import. Click **OK**.
11. The Collaboration folder is viewable in the Admin Objects Directory.
12. Click the Collaboration folder to check for the following objects: Content Source; Group; Portlet; Remote Server; Property; Web Service.

Starting the Notification Service

This section describes how to start the Notification Service on Windows and UNIX/Linux.

Starting the Notification Service on Windows

To start the Notification service on Windows:

1. **Start** | **Programs** | **Administrative Tools** | **Services**
2. Locate and then right-click the BEA ALI Notification service and select **Start**.

Starting the Notification Service on UNIX/Linux

To start the Notification Service on UNIX/Linux, run the **ptnotificationserverd.sh** script with the **start** argument. This script is located in the **/opt/bea/alui/ptnotification/4.2/bin** directory.

To run the script use **ptnotificationserverd.sh start** and to stop the script use **ptnotificationserverd.sh stop**

This script executes the Notification Service in the background and can be incorporated into the Linux environment startup scripts if necessary.

Check the **notification.log** file for errors. This file is found in the **/opt/bea/alui/ptnotification/4.2/settings/logs** directory.

Starting Collaboration

This section describes how to start Collaboration on Windows and UNIX/Linux.

Starting Collaboration on Windows

To start Collaboration on Windows:

1. Reboot the computer where Collaboration is installed if you have not done so since running the installer.
2. Start the Windows service named **BEA ALI Collaboration**.
3. Verify that Collaboration is functioning correctly by accessing and analyzing the Collaboration Diagnostics page:

   `http://<your-collab-URL>:<your-collab-port>/collab/admin/diagnostic`

   For more information on using the Collaboration Diagnostics page, see *Administrator Guide for BEA AquaLogic Interaction Collaboration*.

Starting Collaboration on UNIX/Linux

To start Collaboration on UNIX/Linux:

1. Run the **ptcollaborationserverd.sh** script with the **start** argument. This script is found in the **/opt/bea/alui/ptcollab/4.2/bin** directory.
2. Verify that Collaboration is functioning correctly by accessing and analyzing the Collaboration Diagnostics page:

   `http://<your-collab-URL>:<your-collab-port>/collab/admin/diagnostic`

   For more information on using the Collaboration Diagnostics page, see *Administrator Guide for BEA AquaLogic Interaction Collaboration*.

Check the **collaboration.log** file for any errors. This file is found in the **/opt/bea/alui/ptcollab/4.2/settings/logs** directory.

Configuring Optional Collaboration Features

The following optional features require additional configuration and setup after you have run the installer:

- Personal Projects
- Bulk Upload
- Groupware Integration
- Publish to Knowledge Directory

For more information on configuring these features, see *Administrator Guide for BEA AquaLogic Interaction Collaboration*.

Setting Up Collaboration Logging

For AquaLogic Interaction 6.x, you have the option to set up Collaboration Logging. This includes setting up Logging Utilities and configuring ALI Logging Spy to display Collaboration messages. For more information on setting up Collaboration Logging, refer to the *Administrator Guide for BEA AquaLogic Interaction Collaboration*.

CHAPTER 5

Upgrade

This chapter discusses how to upgrade from previous versions of Collaboration to the current version. This chapter lists upgrade paths and describes the following procedures, which you must perform in sequential order:

1. Running the Installer During Upgrade
2. Upgrading the Portal and Collaboration Databases
3. Post-Upgrade Procedures

Note: If you are upgrading Oracle from 10.1.x to 10.2.x or SQL Server from 2000 to 2005, you should perform the Oracle or SQL Server upgrade before upgrading Collaboration.

Upgrade Paths

The following table describes the upgrade paths that you can follow to upgrade to the current version of Collaboration:

Table 5-1 Upgrade Paths

Upgrade Path	Description
4.2 to 4.2 MP1	Run the Collaboration installer and perform post-upgrade procedures (a script for upgrading the portal and Collaboration databases from 4.2 to 4.2 MP1 does not exist). For more information, see: • "Running the Installer During Upgrade" on page 5-3 • "Post-Upgrade Procedures" on page 5-6
4.1 SP2 to 4.2 MP1	Perform the procedures that are described in this chapter in sequential order. When performing the procedure "Upgrading the Portal and Collaboration Databases", run the collaboration-server-4.1.2-to-4.2.1-upgrade.sql upgrade script.
4.1 SP1 to 4.2 MP1	Perform the procedures that are described in this chapter in sequential order. When performing the procedure "Upgrading the Portal and Collaboration Databases", run the following scripts in sequential order: 1. collaboration-server-4.1.1-to-4.1.2-upgrade.sql 2. collaboration-server-4.1.2-to-4.2.1-upgrade.sql
4.1 to 4.2 MP1	Perform the procedures that are described in this chapter in sequential order. When performing the procedure "Upgrading the Portal and Collaboration Databases", run the following scripts in sequential order: 1. collaboration-server-4.1.1-to-4.1.2-upgrade.sql 2. collaboration-server-4.1.2-to-4.2.1-upgrade.sql **Note:** You do not need to run an upgrade script for upgrading Collaboration 4.1 to 4.1 SP1. For this reason, you run the script for upgrading Collaboration 4.1 SP1 to 4.1 SP2 when performing this upgrade.

Table 5-1 Upgrade Paths

Upgrade Path	Description
4.0.2 to 4.2 MP1	Perform the procedures that are described in this chapter in sequential order. When performing the procedure "Upgrading the Portal and Collaboration Databases", run the following scripts in sequential order: 1. collaboration-server-4-0-2-to-4-1-0-upgrade.sql 2. collaboration-server-4.1.1-to-4.1.2-upgrade.sql 3. collaboration-server-4.1.2-to-4.2.1-upgrade.sql
(Windows Only) 3.x to 4.2 MP1	If you are currently on Collaboration Server version 3.x, you must first upgrade to Collaboration Server 4.0.2. Refer to the *Installation Guide for Plumtree Collaboration Server 4.0.2* for information on this upgrade path. After upgrading to Collaboration Server 4.0.2, upgrade Collaboration according to the instructions described in the 4.0.2 to 4.2 MP1 upgrade path.
2.x to 4.2 MP1	If you are currently on Collaboration Server version 2.x, you must first upgrade to Collaboration Server 3.x. Refer to the *Installation Guide for Plumtree Collaboration Server 3.0* for information on this upgrade path. After upgrading to Collaboration Server 4.0.2, upgrade Collaboration according to the instructions described in the 3.x to 4.2 MP1 upgrade path. **Note: UNIX/Linux users -** Collaboration 3.x was released only on Windows. The installation of 3.x must take place on a Windows machine.

Running the Installer During Upgrade

To run the installer during upgrade:

1. Backup the portal and Collaboration databases and the Document Repository Service.

   This allows you to recover your data if there is a problem during installation. For more information see your database documentation.

2. Stop the BEA ALI Collaboration service, Notification Service, Search Service, Automation Service and Document Repository Service.

3. Clear the embedded application server's work directory. By default, this directory is located in:

   – **(Windows)** C:\bea\alui\common\container\tomcat\<version>\work

  - **(UNIX/Linux)** /opt/bea/alui/common/container/tomcat/<version>/work

4. Copy the installer files to the directory where you have installed the old versions of the Collaboration files.

   This allows the installer to use the silent properties file created by previous installations. For more information on using the silent properties file, see "Silent Properties File" on page C-1.

5. On the machine hosting the previous version of Collaboration, run the installer and choose the following components:

   - Collaboration
   - Notification Service

   For step-by-step details on running the installer, see "Installing Collaboration" on page 4-2.

6. Run the Collaboration installer on the machine on which you installed the portal's Image Service. Choose the Image Service Files component.

7. **(Windows only)** Reboot the machine on which Collaboration is installed.

Upgrading the Portal and Collaboration Databases

This section describes updating the portal and Collaboration databases. Perform the procedure that is appropriate to your database platform

Note: You must upgrade both the portal and Collaboration databases. Additionally, both databases must reside on the same computer.

Upgrading Oracle Databases

Assuming that you installed the Collaboration files in the default location, the Oracle upgrade script files are located on the Collaboration computer.

To upgrade Oracle databases:

1. Copy the Collaboration database upgrade scripts from the default installation location to an Oracle folder or subdirectory on the computer where the database resides. The scripts are located in one of the following paths:

   - **(Windows)** <PT_HOME>\ptcollab\4.2\sql\6.1\Oracle\OracleNT9.2 **OR** <PT_HOME>\ptcollab\4.2\sql\6.1\Oracle\OracleNT10

  - **(UNIX/Linux)** <PT_HOME>\ptcollab\4.2\sql\6.1\Oracle\OracleUnix9.2 **OR** <PT_HOME>/ptcollab/4.2/sql/6.1/Oracle/OracleUnix10

2. Ensure that you have installed the latest Oracle patches.
3. Configure the database to archive log files if you are upgrading in a production environment.
4. Shut down the database to get a read-consistent backup.
5. Using SQLPlus and the Collaboration database server schema user ID and password, run the upgrade script that is appropriate to your upgrade path. These scripts upgrade the Collaboration database schema:
   - collaboration-server-4-0-2-to-4-1-0-upgrade.sql
   - collaboration-server-4.1.1-to-4.1.2-upgrade.sql
   - collaboration-server-4.1.2-to-4.2.1-upgrade.sql

   Note: If you are performing multiple upgrades, run the upgrade scripts in the order listed in "Upgrade Paths" on page 5-2.
6. Run the **collaboration-server-portal-role-grant.sql** script.
7. Using SQLPlus and the portal database server schema user ID and password, run the following:
   - portal-collaboration-server-data.sql
   - portal-collaboration-server-role-grant.sql
   - portal-collaboration-server-upgrade.sql

Upgrading SQL Server Databases (Windows Only)

Assuming that you installed the Collaboration files in the default location, the MS SQL Server 2000 upgrade script files are located on the Collaboration computer. These scripts are located in:

<PT_HOME>\ptcollab\4.2\sql\6.1\MSSQLServer

To upgrade SQL Server databases:

1. Run **Query Analyzer**.
2. Open, then run the following script files on the Collaboration database as the Collaboration database user:
   - collaboration-server-4-0-2-to-4-1-0-upgrade.sql

- collaboration-server-4.1.1-to-4.1.2-upgrade.sql
- collaboration-server-4.1.2-to-4.2.1-upgrade.sql
- collaboration-server-portal-role-grant.sql

Note: If you are performing multiple upgrades, run the upgrade scripts in the order listed in "Upgrade Paths" on page 5-2.

3. Open, then run the following script files on the portal database as the portal database user:
   - portal-collaboration-server-role-grant.sql
   - portal-collaboration-server-data.sql
   - portal-collaboration-server-upgrade.sql
4. Close Query Analyzer.

Post-Upgrade Procedures

This section lists, in order, additional procedures that you must perform after upgrading the portal and Collaboration databases.

1. Import the migration package. For details, see "Importing the Collaboration Migration Package" on page 4-17.
2. If you have set Collaboration to manually capture portal gateway values you must change the Web Service ID being used. It must be set to the WebService ID of the Notification Gateway Entry, which can be found in Collaboration Administration's Portal Access page.
3. Start the Notification Service. For details, see "Starting the Notification Service" on page 4-19.
4. Start Collaboration. For details, see "Starting Collaboration" on page 4-20.
5. If desired, configure the following advanced Collaboration features:
   - Personal Projects
   - Bulk Upload
   - Groupware Integration
   - Publish to Knowledge Directory
6. For more information on configuring these features, see *Administrator Guide for BEA AquaLogic Interaction Collaboration*.

7. Verify that Collaboration is functioning correctly by accessing and analyzing the Collaboration Diagnostics page:

   `http://<your-collab-URL>:<your-collab-port>/collab/admin/diagnostic`

   For more information on using the Collaboration Diagnostics page, see *Administrator Guide for BEA AquaLogic Interaction Collaboration*.

8. Rebuild the Search Collection:

   a. Log on to the portal computer as a portal administrator.

   b. Click **Administration**.

   c. Choose the **Collaboration Administration** utility.

   d. Click **Search Service**.

   e. Click **Rebuild Search Collection**.

   f. Click **OK**.

APPENDIX A

Installing the Exchange Remote API to Enable Groupware Integration

This appendix describes how to install the Exchange Remote API, which you use to integrate with Microsoft Exchange.

Note: Integration with Microsoft Exchange is only compatible with Windows operating systems.

You can run the Exchange Remote API installer either before running the Collaboration installer or after running the Collaboration installer and scripting the portal and Collaboration databases.

If you already ran the Collaboration installer (and chose **No Groupware Integration** on the **Collaboration: Advanced Features** installer screen) and would like to configure Groupware Integration now, you do not need to run the Collaboration installer again. Instead, change the config.xml file settings for Groupware Integration appropriately. For details on configuring Groupware Integration-specific settings in config.xml, see *Administrator Guide for BEA AquaLogic Interaction Collaboration.*

Running the Exchange Remote API Installer

This section describes how to run the Exchange Remote API installer. You can install the Exchange Remote API on either the Collaboration host or on a different machine.

Note: Before running the Exchange Remote API installer, you must prepare the system for Microsoft Exchange integration. For details, see "Preparing the System for Microsoft Exchange Integration (Windows Only)" on page 4-2.

After running the Exchange Remote API installer, you must verify IIS configuration. For details, see Appendix B, "Configuring and Verifying IIS."

To run the Exchange Remote API installer:

1. Double-click the installation file: **ALIExchangeRemoteAPI_v1-0.exe**. This file is located in the Collaboration CD or download, in the same directory as the ALICollaboration_4-2_MP1.exe installation file.
2. the CD or download contains this as a separate installer in the same directory as the Collab installer.
3. Complete the following installer screens:

Table A-1 Exchange Remote API Installer Screens

Installer Screen	Description
Introduction	Provides general information on using the installer. Click **Next** to begin the installation.
Installation Folder	Click **Choose** to change the installation folder. Click **Next** to continue.
Select IIS Website	Choose whether to deploy to the default IIS Web Site. Click **Next** to continue.
Specify IIS Website Information	**IIS Website Name**: The URL of the IIS server. **Note:** If you are installing the Exchange Remote API before running the Collaboration installer, you will need to enter the same value you enter when installing Collaboration. **IIS Website Port**: The port where the IIS server listens for requests. **Note:** You must ensure that the Collaboration Web application and the IIS virtual directory used by groupware integration are running on different ports. **IIS Website Secure Port**: The port where the IIS server listens for secure requests. After you have entered the required information, click **Next**.
Pre-Installation Summary	Display this installation folder and disk space requirements for the installation.
Install Complete	After the installer has finished, you must restart the system to complete the installation.

APPENDIX B

Configuring and Verifying IIS

This appendix describes how to configure and verify IIS to support the Exchange Remote API. For details on installing the Remote Exchange API, see Appendix A, "Installing the Exchange Remote API to Enable Groupware Integration,".

This chapter discusses:

- Configuring and Verifying IIS 6.0 on Windows 2003
- Configuring and Verifying IIS 5.0 on Windows 2000

Configuring IIS is the first procedure that you must perform when preparing the system before running the Exchange Remote API installer. For details on all of the procedures required to prepare the system, see "Preparing the System for Microsoft Exchange Integration (Windows Only)" on page 4-2.

After running the Exchange Remote API installer, you must verify proper configuration of IIS.

Configuring and Verifying IIS 6.0 on Windows 2003

This section describes pre- and post-installation steps to verify that IIS is configured to support the portal. It includes the following topics:

- Configuring IIS
- Verifying IIS Configuration

Configuring IIS

Perform this procedure **before** installing the Exchange Remote API. Configure IIS on the machine on which you are planning to install the Exchange Remote API.

To configure IIS:

1. Ensure that you have installed the latest hotfixes for IIS and .NET.

   If IIS is not installed on your host computer, use the Manage Your Server utility to add Application Server as a role. This process installs and configures IIS, as well as enables ASP .NET.

2. Ensure the WWW Service is configured to start automatically. To configure Services:

   a. Click **Start | Administrative Tools | Services**.

   b. Right-click **World Wide Web Publishing Service** and then click **Properties**.

   c. Configure the service to start automatically.

3. To ensure that .NET is registered in IIS, verify that the **.asmx**, **.aspx**, and **.asax** application extensions have been configured for IIS Web sites, To verify registered application extensions:

   a. In IIS Manager, right-click the **Web Sites** folder and then click **Properties**.

   b. Click the **Home Directory** tab.

   c. Click the **Configuration** button.

   d. Click the **Mappings** tab.

   e. In the application extensions box, verify that the **.asmx**, **.aspx**, and **.asax** extensions have been installed and reference the .NET 1.1 **aspnet_isapi.dll** library.

   If .NET has not been registered to IIS, register it with the ASP .NET registration utility., which is located in the .NET Framework installation. For example:

   ```
   C:\WINDOWS\Microsoft.NET\Framework\v1.1.4322\aspnet_regiiis.exe -i
   ```

4. On Windows 2003, portal components run in IIS 5.0 Isolation Mode. To configure IIS 6.0 for IIS 5.0 Isolation Mode:

   a. In IIS Manager, expand the local computer, right-click **Web Sites** and then click **Properties**.

b. Click the **Service** tab, select the **Run WWW service in IIS 5.0 isolation mode** check box, and then click **OK**.

5. Configure request handling for Web extensions used by Collaboration. To configure permissions for Web extensions:

   a. In IIS Manager, expand the local computer and click **Web Service Extensions**.

   b. Use the controls to set **ASP .NET** to enable request handling.

6. Verify that IIS Directory Security is configured with a *user name - password* pair to enable anonymous access:

   a. In IIS Manager, expand the local computer, right-click **Web Sites, and select Properties.**

   b. Click the **Directory Security** tab.

   c. Ensure that **Enable Anonymous Access** is selected and that the *user name - password* pair is valid.

Note: After installation, you may change security settings according to your security plan. For information on security in the portal, see the *Deployment Guide for BEA AquaLogic User Interaction G6* and the *Administrator Guide for BEA AquaLogic Interaction Collaboration*.

Verifying IIS Configuration

Perform this procedure **after** installing the Exchange Remote API. Verify IIS configuration on the machine on which you installed the Exchange Remote API.

To verify IIS configuration:

1. Verify that the portal gateway filter (also known as the Plumtree Gateway filter) has been installed. To display the ISAPI filter stack:

   a. In IIS Manager, expand the local computer, right-click **Web Sites** and then click **Properties**.

   b. Click the **ISAPI Filters** tab and make sure that the **Plumtree Gateway** filter is installed and ordered above the **ASP.NET** filter in the stack. If necessary, re-order the stack.

   c. Restart IIS.

2. Verify that the **.pt** extension mapping has been added to the portal Web site and is properly configured. To display extension mappings:

a. In IIS Manager, expand the **Web Sites** folders to display the portal virtual directory; right-click the portal virtual directory and then click **Properties**.

b. Click the **Home Directory** tab.

c. Click the **Configuration** button.

d. Click the **Mappings** tab.

e. In the application extensions box, verify that the **.pt** extension has been installed; click **Edit** and verify that the **.pt** extension references the .NET 1.1 aspnet_isapi.dll and that the Verb list includes GET, HEAD, POST, OPTIONS, PROPFIND, PROPPATCH, MKCOL, LOCK, UNLOCK, PUT, DELETE, COPY, and MOVE.

Configuring and Verifying IIS 5.0 on Windows 2000

This section describes pre- and post-installation steps to verify that IIS is configured to support the portal. It includes the following topics:

Configuring IIS

Perform this procedure **before** installing the Exchange Remote API. Configure IIS on the machine on which you plan to install the Exchange Remote API.

To configure IIS:

1. Ensure that you have installed the latest hotfixes for IIS and .NET.
2. To ensure that .NET is registered in IIS, check that the **.asmx**, **.aspx**, and **.asax** application extensions have been configured for IIS Web sites, To check registered application extensions:

   a. In IIS Manager, right-click the **Web Sites** folder and then click **Properties**.

   b. Click the **Home Directory** tab.

   c. Click the **Configuration** button.

   d. Click the **Mappings** tab.

e. In the application extensions box, verify that the **.asmx**, **.aspx**, and **.asax** extensions have been installed and reference the .NET 1.1 library.

If .NET has not been registered to IIS, register it with the ASP .NET registration utility, which is located in the .NET Framework installation. For example:

```
C:\WINNT\Microsoft.NET\Framework\v1.1.4322\aspnet_regiiis.exe -i
```

Verifying IIS Configuration

Perform this procedure **after** installing the Exchange Remote API. Verify IIS configuration on the machine on which you installed the Exchange Remote API.

To verify IIS configuration:

1. Verify that the portal gateway filter (also known as the Plumtree Gateway filter) has been installed. To display the ISAPI filter stack:

   a. In IIS Manager, expand the local computer, right-click **Web Sites** and then click **Properties**.

   b. Click the **ISAPI Filters** tab and make sure that the **Plumtree Gateway** filter is installed and ordered above the **ASP.NET** filter in the stack. If necessary, re-order the stack.

   c. Restart IIS.

2. Verify that the **.pt** extension mapping has been configured for the portal virtual directory. To display extension mappings:

   a. In IIS Manager, expand the **Web Sites** folders to display the portal virtual directory; right-click the portal virtual directory and then click **Properties**.

   b. Click the **Home Directory** tab.

   c. Click the **Configuration** button.

   d. Click the **Mappings** tab.

   e. In the application extensions box, verify that the **.pt** extension has been installed; click **Edit** and verify that the **.pt** extension references the .NET 1.1 **aspnet_isapi.dll** library and that the Verb list includes GET, HEAD, POST, OPTIONS, PROPFIND, PROPPATCH, MKCOL, LOCK, UNLOCK, PUT, DELETE, COPY, and MOVE.

APPENDIX C

Silent Properties File

When you install Collaboration, the installer creates the file **AquaLogicInteractionCollaboration_<version>_silent.properties** in the directory where Collaboration is installed. Once you have created a silent properties file on one computer, you can reuse it when you install Collaboration on other computers, so that you do not have to re-enter deployment information every time you use the installer. During a "silent" install, the information required by the installation dialogs is read from the properties file.

A silent install may be run from the command line as follows:

```
<full_Path_To_Installer>/ALICollaboration_<version> –f

<full_Path_To_Properties_File>/AquaLogicInteractionCollaboration_<version>
.properties
```

For example:

```
<full_Path_To_Installer>/ALICollaboration_v4-2 - f

<full_Path_To_Properties_File>/AquaLogicInteractionCollaboration_v4-2_sile
nt.properties
```

A silent install can be useful for distribution of the product across a uniform set of machines.

Uninstalling Collaboration

This appendix discusses how to uninstall Collaboration.

Note: Performing an uninstallation removes the core application from the Collaboration host machine. We do not support removing Collaboration image service files from the portal server.

Uninstalling Collaboration on Windows

To uninstall Collaboration on Windows, use **Add/Remove Programs** to remove **AquaLogic Interaction Collaboration**.

Uninstalling Collaboration on UNIX/Linux

To uninstall Collaboration on UNIX and Linux platforms, launch the uninstaller for Collaboration 4.2 by navigating to: /opt/bea/userinteraction/uninstall/ptcollab/4.2/ and running the command **./uninstallAquaLogic_Interaction_Collaboration**.

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