BEA AquaLogic™ Interaction JSR-168 Consumer

Installation and Upgrade Guide

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CHAPTER 1

Welcome

How to Use This Book

This book describes how to install AquaLogic Interaction JSR-168 Consumer 1.1.

Audience

This guide is written for the user responsible for installing JSR-168 Consumer. This user must have strong knowledge of the operating system and web application servers.

Organization

This chapter provides information on how to use this guide and lists additional resources. This guide also includes the following chapters:

- Chapter 2, "Installation Prerequisites," provides hardware and software requirements. Read this chapter and meet the prerequisites before proceeding with installation.
- Chapter 3, "Installation - Unix and Linux," provides detailed instructions for installing and configuring JSR-168 Consumer on Unix and Linux.
- Chapter 4, "Installation - Windows," provides detailed instructions for installing and configuring JSR-168 Consumer on Windows.
- Chapter 5, "Additional Configuration Steps," provides additional steps for customizing portlets that use JSR-168 Consumer 1.1.

Typographical Conventions

This book uses the following typographical conventions.

Table 1-1 Typographical Conventions

Convention	Typeface	Examples/Notes
• File names • Folder names • Screen elements	**bold**	• Upload **Procedures.doc** to the portal. • The log files are stored in the **logs** folder. • To save your changes, click **Apply Changes**.
• Text you enter	`computer`	Type `Marketing` as the name of your community.
• Variables you enter	`computer with angle brackets (<>)`	Enter the base URL for the Remote Server. For example, `http://<my_computer>/`.
• New terms • Emphasis • 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

This section describes other documentation and resources provided by BEA.

Table 1-2 BEA Documentation and Resources

Resource	Description
Release Notes	These files are written for AquaLogic Interaction JSR-168 Consumer administrators. They include information about new features and known issues in the release. They are available on edocs.bea.com and on the application CD.
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 1-2 BEA Documentation and Resources

Resource	Description
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 in electronic form (PDF) on edocs.bea.com.
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.

Table 1-2 BEA Documentation and Resources

Resource	Description
dev2dev.bea.com	Download developer tools and documentation, get help with your development project, and interact with other developers via BEA's dev2dev Newsgroups.
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 France +33 1.46.91.86.79 Australia/NZ +61 2.9923.4030 Asia Pacific +61 2.9931.7822 Singapore +1 800.1811.202

CHAPTER 2

Installation Prerequisites

Before you run the AquaLogic Interaction JSR-168 Consumer installer, complete the following steps:

1. Download the most up-to-date documentation from edocs.bea.com.
2. Read the product release notes for additional 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. Provision host computers for your deployment and install prerequisite software. For details, see the Hardware and Software Requirements that follow.

Hardware and Software Requirements

The following tables summarize the operating system and software requirements for AquaLogic Interaction JSR-168 Consumer.

- Software Requirements on Linux and Unix
- Software Requirements on Windows

Software Requirements on Linux and Unix

Note: For the most up-to-date list of supported software for your deployment, refer to the Interoperability page in the AquaLogic User Interaction Support Center.

Caution: IPv6 is not supported. You should verify that IPv6 is not enabled prior to installing JSR-168 Consumer.

Component	Requirement
Remote Server (Host Computer)	**Disk:** 128 MB available **Memory:** 512 MB RAM **Operating System:** • AIX 5.3 • Red Hat Enterprise Linux 3 Update 3 (ES & AS) • Solaris 8 and 9 • SUSE Linux 9 **Application Server:** JSR-168 requires an application server that follows the 2.3 Servlet specifications. The following application servers are supported: • On Red Hat – BEA WebLogic 8.1 SP4, JRockit SDK 1.4.2_05-8140 – Tomcat 5.0.28, Sun SDK 1.4.2_06 • On SUSE – BEA WebLogic 8.1 SP4, JRockit SDK 1.4.2_05-8140 – IBM WebSphere 6.0.1, IBM SDK 1.4.2 – Tomcat 5.0.28, Sun SDK 1.4.2_06 • On Solaris – BEA WebLogic 8.1 SP4, Sun SDK 1.4.2_05 – Tomcat 5.0.28, Sun SDK 1.4.2_06 • On AIX – IBM WebSphere 6.0.1, IBM (32-bit) SDK 1.4.2
Portal Software	• Plumtree Corporate Portal 5.0.x • Plumtree Foundation 6.0.x • AquaLogic Interaction 6.1

Software Requirements on Windows

Note: For the most up-to-date list of supported software for your deployment, refer to the Interoperability page in the AquaLogic User Interaction Support Center.

Component	Requirement
Remote Server (Host Computer)	**Disk:** 128 MB available **Memory:** 512 MB RAM **Operating System:** Windows 2003 Server **Application Server:** JSR-168 requires an application server that follows the 2.3 Servlet specifications. The following application servers are supported: • BEA WebLogic 8.1 • Tomcat 5.0.28 • WebSphere 6.0.1
Portal Compatibility	• Plumtree Corporate Portal 5.0.x • Plumtree Foundation 6.0.x • AquaLogic Interaction 6.1

CHAPTER 3

Installation - Unix and Linux

This chapter explains how to install and configure the AquaLogic Interaction JSR-168 Consumer on a Unix or Linux operating system for use with AquaLogic Interaction.

Before installing, confirm that your system meets the requirements. For details, see Chapter 2, "Installation Prerequisites."

The installation process includes three steps:

- Install Files on Remote Server
- Configure Remote Server
- Import Resource Package (Web Services and Portlets)

Install Files on Remote Server

Follow the steps below to install the JSR-168 Consumer on your remote server (host computer).

1. Check to see if the PT_HOME variable has been set by entering the following command:

   ```
   echo $PT_HOME
   ```

2. If the PT_HOME variable exists, unzip the **jsr-168_java.tgz** file to the location returned. If the PT_HOME variable does not exist, create a directory called **/opt/bea/alui** and unzip the jsr-168_java.tgz file to that location.

3. Deploy the **PtPortletContainer.war** file in the $PT_HOME/ptjsr168/1.1/webapp folder using the method appropriate for your application server.

Configure Remote Server

The steps required to configure the remote server are different depending on the results of step 1 under Install Files on Remote Server above.

If the PT_HOME variable already exists:

1. Navigate to the directory referenced by PT_HOME and open **pthome.xml** in a text editor.

2. Add the following code within the pthome element (between `<pthome>` and `</pthome>`). **Note:** If the PT_HOME directory is not /opt/bea/alui, change the `<path>` and `<configpath>` elements to reflect the correct location.

   ```
   <product name="ptjsr168">
   <install version="1.1">

      <path>/opt/bea/alui/ptjsr168/1.1</path>
      <configpath>/opt/bea/alui/ptjsr168/1.1/settings/config</configpath>

   </install>
   </product>
   ```

If the PT_HOME variable does not exist:

1. Copy the **pthome.xml** file from opt/bea/alui/ptjsr168/1.1/settings/config to the root **/opt/bea/alui** directory.

2. Set the PT_HOME environment variable by entering the following commands:

   ```
   PT_HOME='/opt/bea/alui'
   export PT_HOME
   ```

Import Resource Package (Web Services and Portlets)

Use the **ptmigration.sh** script to import the JSR-168 Consumer Web services and portlets into the portal. The ptmigration.sh is located in your portal bin directory:

```
cd $PT_HOME/ptportal/<ver>/bin
```

Where <ver> is your portal version (for example, 6.0).

You must provide appropriate input values to the ptmigration.sh script. The parameters are:

```
[username] [password] -import [import file name] [log file name]
<-noacls> <-overwriteremoteservers> <-createnewobjectinstances>
```

For example,

```
./ptmigration.sh Administrator "" \ -import
$PT_HOME/ptjsr168/1.1/serverpackages/jsr-168.pte migration.log
```

This command imports the resource package assuming the administrator password is blank ("") and the jsr-168.pte file is in the specified location ($PT_HOME/ptjsr168/1.1/serverpackages/). Any issues with the import will be written to migration.log.

After the resource package is imported, a JSR-168 folder will appear in portal administration that includes the JSR-168 Remote Server, three Web Services (GooglePortletWebService, RSSPortletWebService and JspPortletWebService), and three portlets (GooglePortlet, RSSPortlet and JspPortlet). These portlets do not require any configuration.

Note: Before placing the portlets on a page, edit the JSR-168 Remote Server object and change the Remote Server URL to the correct address of the host computer.

CHAPTER 4

Installation - Windows

This chapter describes how to install AquaLogic Interaction JSR-168 Consumer on a Windows operating system for use with AquaLogic Interaction.

Before installing, confirm that your system meets the requirements. For details, see Chapter 2, "Installation Prerequisites."

The installation process includes three steps:

- Install Files on Remote Server
- Configure Remote Server
- Import Resource Package (Web Services and Portlets)

Install Files on Remote Server

Follow the steps below to install the JSR-168 Consumer on your remote server (host computer).

1. Check to see if the PT_HOME variable has been set.
   a. On the desktop, right click on **My Computer** and select **Properties**.
   b. Go to the **Advanced** tab and click **Environment Variables**.
   c. Look under **System Variables** for the **PT_HOME** variable. If the portal is installed on the server, this variable will point to the portal installation folder.
   If the PT_HOME variable exists, make a note of the value and close the window.
   d. If the PT_HOME variable does not exist, click **New** to create a variable with the following properties: **Variable Name:** `PT_HOME` **Variable Value:** `C:\bea\alui`
   (The variable can be set to any location if the portal is not installed on the same server. Make a note of the location you enter; it is required in multiple steps below.)
2. Unzip the **jsr-168_java.zip** file to the PT_HOME location.
3. Deploy the **PtPortletContainer.war** file in the <PT_HOME>/ptjsr168/1.1/webapp folder using the method appropriate for your application server.

Configure Remote Server

The steps required to configure the remote server are different depending on the results of step 1 under Install Files on Remote Server above.

If the PT_HOME variable was previously set:

1. Navigate to the directory referenced by PT_HOME and open **pthome.xml** in a text editor.
2. Add the following code within the pthome element (between `<pthome>` and `</pthome>`).

   Note: Replace *<PT_HOME>* with the location referenced by the PT_HOME variable (i.e., the portal installation directory).

```
<product name="ptjsr168">
<install version="1.1">

   <path><PTHOME>/ptjsr168/1.1</path>
   <configpath><PTHOME>/ptjsr168/1.1/settings/config</configpath>

</install>
</product>
```

If you created the PT_HOME variable:

Copy the **pthome.xml** file from <PT_HOME>/ptjsr168/1.1/settings/config to the root PT_HOME directory.

Import Resource Package (Web Services and Portlets)

Follow the steps below to import the JSR-168 Consumer Web Services and Portlets into the portal:

1. Launch the Migration Wizard (**Start** | **Programs** | **BEA** | **Migration Wizard**). In previous installations, this utility is found under Start | Programs | Plumtree.
2. Login as an administrator and click **Next**.
3. Choose **Import** and click **Next**.
4. Confirm that the **Import object ACLs** is the only option selected. Click the choose file button and browse to **<PT_HOME>/ptjsr168/1.1/serverpackages/jsr-168.pte**. Click **Next**.
5. The contents of the migration package will be listed. Click **Next**, then click **Migrate** to import the package.
6. When the migration successful popup appears, click **OK** to close the Migration Wizard.

After importing the resource package, a JSR-168 folder will appear in portal administration that includes the JSR-168 Remote Server, three Web Services (GooglePortletWebService, RSSPortletWebService and JspPortletWebService), and three portlets (GooglePortlet, RSSPortlet and JspPortlet). These portlets do not require any configuration.

Note: Before placing the portlets on a page, edit the JSR-168 Remote Server object and change the Remote Server URL to the correct address of the host computer.

The RSSPortlet can be edited to add additional RSS files and set proxy settings. The proxy host and port are set in the administrative settings (RssPortlet- Configure this portlet) and the proxy username, password, and domain (if required) are set in portlet preferences. Note that the proxy password is only obfuscated with Base64 Encoding; it is left to the developer to provide encryption.

CHAPTER 5

Additional Configuration Steps

The steps listed in this chapter are provided for your information; they are not required.

- Modify Existing Portlet Applications
- Create New Portlet Applications
- Add Support for Shared Sessions
- Add Tag Library Support
- Build Stylesheet Templates
- Use SSL
- Use Application Server Values for getRemoteUser(), getUserPrincipal(), and isUserInRole()
- Access User Information
- Support Editing Pages (Edit Mode)

Modify Existing Portlet Applications

The portlets provided with the JSR-168 Consumer can be customized. To customize the existing portlets, follow the steps below:

1. Create a new Web application for your portlets.
2. Extract the portlet application WAR file, if necessary.
3. Place the JSR-168 Consumer jar files into the **WEB-INF/lib** directory of your new portlet application. These include the following files:

- commons-beanutils.jar
- commons-codec-1.3.jar
- commons-collections.jar
- commons-digester-1.5.jar
- commons-httpclient-3.0-rc1.jar
- commons-logging.jar
- edk.jar
- jsr168tags.jar
- googleapi.jar
- log4j.jar
- openfoundation.jar
- oreilly.jar
- pthome.jar
- ptportletcontainer.jar
- xalan.jar
- xerces144.jar

4. The web.xml file must include `servlets`, `servlet-mappings`, `context listener`, and `tag libraries`. Use **ptjsr168/1.1/devkit/WEB-INF/web.xml** as a template. Elements must be added in the proper order, or the application will not start. See your application server documentation for the required ordering of elements in the web.xml document.
5. Restart the application server as needed.

Create New Portlet Applications

The default installation includes a WEB-INF directory for creating new portlet applications in **ptjsr168/1.1/devkit/**. To create an application from this directory, follow the instructions below:

1. Create a directory for your new Web application.
2. Add the **/WEB-INF** folder from **ptjsr168/1.1/devkit/** to the new application. If you want to add any new portlet classes (subclassing GenericPortlet), add them to the **WEB-INF/classes** directory in your new application and add a **portlet.xml** file to the **/WEB-INF** directory. Add additional jsp pages and servlets if they are required for your application.
3. Deploy using the instructions for your application server.

Add Support for Shared Sessions

The sample portlets in the JSR-168 Consumer package do not require shared sessions, but it is a best practice to configure shared sessions since the JSR-168 spec requires that sessions are shared per context.

Note: The JSR-168 Consumer portlets cannot be configured to share sessions in versions of the portal prior to 6.0.

To configure support for shared sessions, complete the steps below.

1. In the **Remote Server** editor, add the context to the **Remote Server Base URL**, for example http://myserver:7001/PtPortletContainer. (Create a Remote Server for each context.)
2. In the **Web Service - Remote Portlet** editor, go the **Advanced Settings** page and select "Share sessions with other Portlets on the same Remote Server."

Add Tag Library Support

To add Tag Library support, add the following line to the web.xml file after `servlet-mappings` and `session-config`:

```
<taglib>
   <taglib-uri>http://java.sun.com/portlet</taglib-uri>
   <taglib-location>/WEB-INF/lib/jsr168tags.jar</taglib-location>
</taglib>
```

Note: Make sure the **jsr168tags.jar** in the ptjsr168/1.1/devkit/WEB-INF/lib directory is added to the WEB-INF/lib directory.

Build Stylesheet Templates

Follow the steps below to build any modified stylesheets.

1. Unzip the **ptjsr168_image.zip** file to the **/ptimages** directory on the machine that hosts the Image Service.
2. Go to **/ptimages/tools/cssmill** and execute the following batch file (you must have the permissions to execute the file):
   - Windows: **make_all.bat**
   - Unix/Linux: **make_all.sh** (To modify permissions, use the `chmod` command.)

Use SSL

SSL is used in the PortletURL call `setSecure()`, and in the `transport-guarantee` element of the `security-constraint` element of portlet.xml.

To use SSL, open the **jsr168.properties** file in <PT_HOME>/ptjsr168/1.1/settings/config and set the appropriate values for `httpport` and `httpsport`. SSL must be enabled on the application server and a valid certificate must be installed. If you use a `transport-guarantee` in portlet.xml, the portlet will redirect to the configured SSL port in jsr168.properties.

For both `setSecure()` and `transport-guarantee`, make sure to include the full SSL address up to the war file name in the gateway space (e.g., https:my_server:7002/my_war).

Use Application Server Values for getRemoteUser(), getUserPrincipal(), and isUserInRole()

By default, the JSR-168 Consumer does not use the values from the application server for the security-related calls `getRemoteUser()`, `getUserPrincipal()`, and `isUserInRole()`. Instead, it uses the logged-in portal user for `getRemoteUser()` and `getUserPrincipal()`, and activity rights for `isUserInRole()`. Only the activity rights configured on the Advanced Settings page of the Web Service object are examined for `isUserInRole()`.

To use the application server values for these methods, open the **jsr168.properties** file in <PT_HOME>/ptjsr168/1.1/settings/config and change the **`portalRemoteUser`** key to **false**. Changes will take effect when you restart your application server.

Note: The application server will always return null for `getRemoteUser()` and `getUserPrincipal()` unless the user has logged into the application server.

Access User Information

To access User Information settings from the portal, follow the steps below.

1. Define the user attributes in the **WEB-INF/portlet.xml** file. For example:

   ```
   <user-attribute>
      <description>User Phone</description>
      <name>user.business-info.telecom.telephone.number</name>
   </user-attribute>
   ```

   If a user attribute is not defined in the portlet.xml file, it will not be read.

2. Map the attribute to User Information from the portal in the file **<PT_HOME>/ptjsr168/1.1/settings/config/userattributes.properties**. For example:

   ```
   user.business-info.telecom.telephone.number=phone
   ```

   The first value is the name used by the JSR168 Consumer; the second value is the name of the User Information property in the portal.

3. Restart the application server to implement your changes to userattributes.properties.

4. Add the property to the User Information Property Map in the portal. In this example, the property is “phone” (case-sensitive). To add a property, go to portal administration and click **Select Utility** | **User Profile Manager** and select **User Information - Property Map**. (For details, see the portal online help or the *Administrator's Guide for AquaLogic Interaction*.)

5. Configure the Web Service to send the User Information to the remote server. On the **User Information** page of the Web Service editor, add User Information settings that match the values mapped in the userattributes.properties file. To complete the example above, you would enter “phone” on the User Information page.

To complete the example and view the User Information in a portlet, follow the steps below:

1. Navigate to the Web application that hosts the JSP portlet. Open the **includePortlet.jsp** file and add the following to the user properties String values:

   ```
   String phone = (String)
   map.get(“user.business-info.telecom.telephone.number”);
   ```

   Add the following to display in the jsp page:

   ```
   phone is <%=phone%>
   ```

2. Log in to the portal and click **My Account**. Enter a phone number and click **Finish**.

3. Add the RSS portlet to a portal page and confirm that the phone number you entered appears.

Support Editing Pages (Edit Mode)

To display a page in edit mode, add edit to the action of the form as shown below. (For a complete example, see IncludePortletEdit.jsp, shipped with PtPortletContainer.)

```
<form name=”form1” method=”post” action=<portlet:actionURL
portletMode=”edit”/>>
```

To close the window, set the mode back to view in **`processAction`** in the portlet, as shown below.

```
public final void processAction(ActionRequest req, ActionResponse res)
throws PortletException, IOException

    {

         //do whatever processing is needed for multiple pages

         //when processing is done, set the mode back to view

            res.setPortletMode(PortletMode.VIEW);

    }
```