



BEA AquaLogic™ HiPer Workspace for Retail

Installation and Upgrade Guide

Version 1.1™
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Welcome

This book describes how to install BEA AquaLogic™ HiPer Workspace for Retail 1.1 and the accompanying Business Activity Management (BAM) system. It also provides instructions for upgrading from HiPer for Retail 1.0 to 1.1.

Note: HiPer for Retail supports products that have been renamed between versions. In this guide, we use the most recent product name when referring to all supported versions. However, where information applies to only one version, we use that version's proper name and number.

Audience

This book is written for any person responsible for installing and configuring HiPer for Retail. The user of this guide should have strong knowledge of the database software, the ALI HiPer BAM System (Celequest) software, and any back-end systems you want to connect to HiPer for Retail.

Organization

This book is organized to be a quick reference for people with installation experience, while also providing detailed instructions for those installing for the first time.

This book includes the following chapters:

- [Chapter 2, “Installation Prerequisites”](#) provides complete pre-installation steps, such as reading the release notes and configuring compatible, pre-requisite software.
- [Chapter 3, “Installation”](#) provides instructions for installing HiPer for Retail software on the computers that host the portal, the Image Service, and the Automation Service.
- [Chapter 4, “Post-Installation”](#) provides complete post-installation steps, such as importing HiPer for Retail objects into the portal and configuring the portal to work with HiPer for Retail.
- [Chapter 5, “Upgrade”](#) provides instructions for upgrading HiPer for Retail components.
- [Appendix A, “”](#) provides instructions for uninstalling HiPer for Retail components.

Typographical Conventions

This book uses the following typographical conventions.

Table 1-1 Typographical Conventions

Convention	Typeface	Example
<ul style="list-style-type: none"> File names Folder names Screen elements 	bold	<ul style="list-style-type: none"> Upload Procedures.doc to the portal. Open the General folder. To save your changes, click Apply Changes.
<ul style="list-style-type: none"> Text you enter 	computer	<ul style="list-style-type: none"> Type Marketing as the name of your community.
<ul style="list-style-type: none"> Variables you enter 	<i>italic</i> computer	<ul style="list-style-type: none"> Enter the base URL for the Portlet Server. For example, <i>http://my_computer/</i>.
<ul style="list-style-type: none"> New terms Emphasis Example object names 	<i>italic</i>	<ul style="list-style-type: none"> <i>Portlets</i> are Web tools, embedded in your portal. The URI <i>must</i> be a unique number. The example Knowledge Directory displayed in Figure 5 shows the <i>Human Resources</i> folder.

BEA Documentation and Resources

This section describes the documentation and resources provided by BEA.

Table 1-2 BEA Documentation and Resources


Resource	Description
Administrator Guide	<p>This book describes how to manage HiPer for Retail users and security, how to customize the user interface and available data to suit the needs of your company, and how to maintain HiPer for Retail.</p> <p>It is available in electronic form (PDF) in the release package and on edocs.bea.com.</p>
Release Notes	<p>These files are written for HiPer for Retail administrators. They include information about new features and known issues in the release.</p> <p>They are available in electronic form (HTML) on edocs.bea.com.</p>
Developer Guides, Articles, API Documentation, Blogs, Newsgroups, and Sample Code	<p>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.</p>
Deployment Guide	<p>This document is written for business analysts and system administrators. It describes how to plan your BEA AquaLogic User Interaction deployment.</p> <p>It is available in electronic form (PDF) on edocs.bea.com.</p>
Online Help	<p>The online help is written for all levels of HiPer for Retail users. It describes the user interface for HiPer for Retail and gives detailed instructions for completing tasks in HiPer for Retail.</p> <p>To access online help, click  Help in the upper-right corner of the banner or dialog box.</p>

Table 1-2 BEA Documentation and Resources

Resource	Description
AquaLogic User Interaction Support Center	<p data-bbox="434 390 1170 591">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:</p> <p data-bbox="434 607 700 633">Technical Support Center</p> <p data-bbox="434 649 1170 703">Submit and track support incidents and feature requests, search the knowledge base, access documentation, and download service packs and hotfixes.</p> <p data-bbox="434 718 591 744">News & Events</p> <p data-bbox="434 760 1159 841">The News & Events Center features information on rolling-out a successful deployment. Visit the Super User Group page to collaborate with peers and view upcoming meetings.</p> <p data-bbox="434 857 592 883">Product Center</p> <p data-bbox="434 899 1036 953">Download products, read Release Notes, access recent product documentation, and view interoperability information.</p> <p data-bbox="434 968 615 994">Education Center</p> <p data-bbox="434 1010 1162 1064">Find information about available training courses, purchase training credits, and register for upcoming classes.</p> <p data-bbox="434 1079 1073 1163">If you do not see the Support Center when you log in to http://portal.plumtree.com, contact ALUISupport@bea.com for the appropriate access privileges.</p>

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	<p>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.</p> <p>E-mail: ALUISupport@bea.com</p> <p>Phone Numbers:</p> <p>U.S. and Canada+1 415.263.1696 or +1 866.262.PLUM (7586)</p> <p>Asia Pacific+61 2.9931.7822</p> <p>Europe and U.K.+44 (0)1628 589124</p> <p>France+33 1.46.91.86.79</p> <p>Singapore+65 6832.7747</p>

Installation Prerequisites

Before you run the AquaLogic HiPer Workspace for Retail installer, complete the following steps:

1. 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.
2. Provision host computers and configure software dependencies for your deployment. For details, see [“Hardware and Software Requirements” on page 2-2](#).
3. If you are installing on Linux:
 - a. Create a directory in which to install HiPer for Retail.
 - b. If you do not already have a local portal user, create a new local user to run the installer. (You do not need to run the installer as the root user.)
4. Create the HiPer for Retail database. For details, see [“Creating the HiPer for Retail Database” on page 2-4](#).
5. Complete the deployment component configuration worksheets provided in the *Installation and Planning Worksheets for HiPer for Retail*.

Hardware and Software Requirements

The following tables summarize the operating system and software requirements for AquaLogic Interaction. For details on hardware and scaling, see the *Deployment Guide for BEA AquaLogic User Interaction*. For the most current platform support information, refer to the *Interoperability Matrix*: log in to: <http://portal.plumtree.com>, navigate to the Product Center, and click

Interoperability.

Caution: You must use the same software for the HiPer for Retail components as you use for your Plumtree Foundation components. For example, if your portal database uses SQL Server, your HiPer for Retail database must also use SQL Server.

Table 2-1 Hardware and Software Requirements

Component	Requirement
HiPer for Retail	<ul style="list-style-type: none"> Operating System <ul style="list-style-type: none"> Windows 2000 Server SP4 Windows 2003 Server Windows 2003 Server SP1 Red Hat Enterprise Linux 3.03 on x86 Recommended Hardware <ul style="list-style-type: none"> 1 Ghz or faster processor 1 GB ECC RAM or more 10 GB storage 2 GB temp directory Minimum Hardware <ul style="list-style-type: none"> 600 MHz Pentium III processor 512 MB RAM 4 GB storage 1 GB temp directory
ALI HiPer BAM System (Celequest)	<ul style="list-style-type: none"> 2 GB temp memory For a production deployment, you should run the ALI HiPer BAM System (Celequest) on a separate machine with at least 2 GB temp memory. Celequest 3.7.2.0.326 For installation instructions, refer to Chapter 3, “Installation.” Java JDK 1.4.x Java JDK is needed to run JBoss. The Java JDK is available from http://java.sun.com. Once installed, set the JAVA_HOME environment variable to point to the installed location of the JDK.
Database	<ul style="list-style-type: none"> Oracle 9.2.0.6 Oracle 10.1.0.4 Microsoft SQL Server 2000 SP4 <p>Note: You must use the same database system and version for the HiPer for Retail database as you use for your portal database.</p>
Portal	<ul style="list-style-type: none"> Plumtree Corporate Portal 5.0.5 Plumtree Foundation 6.0 SP1

Table 2-1 Hardware and Software Requirements

Component	Requirement
Content Server/Publisher	<ul style="list-style-type: none">• Content Server 6.1 with HF #201492 (for Plumtree Corporate Portal 5.0.5)• Publisher 6.2 (for Plumtree Foundation 6.0 SP1)
Browser	<ul style="list-style-type: none">• Internet Explorer 5.5• Internet Explorer 6.0• Netscape 7.1• Netscape 7.2• Firefox 1.5

Creating the HiPer for Retail Database

HiPer for Retail requires a database to store metadata relating to the structure of your organization. This database must be the same version as the Portal database.

To create the HiPer for Retail database:

1. Create a user to own the HiPer for Retail database (we refer to this user as the HiPer for Retail user).
2. Create the HiPer for Retail database.
3. Grant the HiPer for Retail user owner rights to the HiPer for Retail database.

Installation

This chapter describes how to install the components necessary for your HiPer for Retail deployment. If you are upgrading from a previous version, refer to [Chapter 5, “Upgrade.”](#)

To install AquaLogic HiPer Workspace for Retail:

1. Ensure that you have met the prerequisites for installation. For details, see [Chapter 2, “Installation Prerequisites.”](#)
2. Install the HiPer for Retail components. For details, see [“Installing the HiPer for Retail Components” on page 3-1.](#)
3. Install the HiPer BAM (Business Activity Manager) System. For details, see [“Installing the ALI HiPer BAM System” on page 3-5.](#)

Installing the HiPer for Retail Components

This section describes how to install the following HiPer for Retail components:

- HiPer for Retail files - includes the HiPer for Retail application.
- Portal files - includes custom navigation files and files that create the portal objects needed for HiPer for Retail as well as data for Publisher.
- Image Service files - includes static files (such as images and help files).
- Automation Service files - includes automated tasks.

The HiPer for Retail components can be installed on different hosts. For details on provisioning hosts for the various components, see the *Deployment Guide for BEA AquaLogic User Interaction*.

Launching the HiPer for Retail Installer

Launching the HiPer for Retail Installer on Windows

To launch the HiPer for Retail installer on a Windows host:

1. Log into the Windows host as the local Administrator.
2. Copy the installer to a temporary location:
 - If you are running Plumtree Corporate Portal 5.0.5, use **AquaLogicInteractionHiPer.exe**.
 - If you are running Plumtree Foundation 6.0 SP1, use **AquaLogicInteractionHiPer_G6.exe**.
3. Close all unnecessary windows and applications.
4. Double-click the installer.

Complete the installation wizard panels as described in [“Completing the Installer Wizard Pages” on page 3-3](#), and according to the settings you planned when you completed the configuration worksheets provided in the *Installation and Planning Worksheets for HiPer for Retail*.

Launching the HiPer for Retail Installer on Linux

The HiPer for Retail installer is a graphical, X-Windows client when run in interactive mode. If you are running the installer on a remote terminal, make sure your DISPLAY is set appropriately.

To launch the HiPer for Retail installer on a Linux host:

1. Log into the Linux host as the local user you created, as described in [Chapter 2, “Installation Prerequisites.”](#)
2. Copy the installer to a temporary location and run it as follows:

```
$ ./AquaLogicInteractionHiPer_G6
```

Complete the installation wizard panels as described in [“Completing the Installer Wizard Pages” on page 3-3](#), according to the settings you planned when you completed the configuration worksheets provided in the *Installation and Planning Worksheets for HiPer for Retail*.

Completing the Installer Wizard Pages

The following table describes the HiPer for Retail installer wizard pages for Linux and Windows platforms.

Note: If the installer setting does not apply to the components you are installing, the installer does not display the wizard page.

Table 3-1 HiPer for Retail Installer Wizard Pages for Linux and Windows

Wizard Page	Description
Introduction	Click Next .
License Agreement	Read and accept the agreement.
Choose Components	In the Install Set drop-down list, select either Complete or Custom . If you select Complete , a full set of HiPer for Retail components is installed. If you select Custom , you can choose individual components to install according to your deployment plan.
Installation Folder	Specify where you want HiPer for Retail installed. The default is C:\Program Files\plumtree. If you want to install in another folder, type the path in the box, or click Choose . If you change your mind and want to install in the default folder, click Restore Default Folder .
Choose Portal Server Folder	Specify where the portal is installed. The default installation folder for Plumtree Corporate Portal 5.0.5 is C:\Program Files\plumtree\ptportal\5.0; the default installation folder for Plumtree Foundation 6.0 SP1 is C:\Program Files\plumtree\ptportal\6.0. If the portal is installed in another location, type the path in the box, or click Choose . To restore the default folder path, click Restore Default Folder .
Choose Automation Server Folder	Specify where the Automation Service is installed. The default installation folder for Plumtree Corporate Portal 5.0.5 is C:\Program Files\plumtree\ptportal\5.0; the default installation folder for Plumtree Foundation 6.0 SP1 is C:\Program Files\plumtree\ptportal\6.0. If the Automation Service is installed in another location, type the path in the box, or click Choose . To restore the default folder path, click Restore Default Folder .
AquaLogic HiPer Workspace for Retail - Application Port	Specify the port through which HiPer for Retail should handle requests (for example, http://<hiperportal>:<port>). The default port is 11970.

Table 3-1 HiPer for Retail Installer Wizard Pages for Linux and Windows

Wizard Page	Description
Document Repository Service	<p>Specify the following connection information for your Document Repository Service:</p> <ul style="list-style-type: none"> Document Repository Service Host - enter the fully qualified domain name Document Repository Service Port - enter the port through which the Document Repository Service handles requests <p>This page only displays if you are running Plumtree Foundation 6.0 SP1.</p>
HiPer Database	Choose your database server— SQL Server or Oracle .
HiPer Database Connection Information	<p>Enter the following values:</p> <ul style="list-style-type: none"> HiPer Database Host Computer HiPer Database Port HiPer Database Name (for Oracle, this is the database SID) HiPer Database Login (for Oracle, this is the database schema user) HiPer Database Password (for Oracle, this is the database schema password) HiPer Database Password Confirmation
Portal Database Connection Information	<p>Enter the following values:</p> <ul style="list-style-type: none"> Portal Database Host Computer Portal Database Port Portal Database Name (for Oracle, this is the database SID) Portal Database Login (for Oracle, this is the database schema user) Portal Database Password (for Oracle, this is the database schema password) Portal Database Password Confirmation
Choose Image Server Folder	Specify where you the Image Service files are installed. The default is C:\Program Files\plumtree\ptimages. If the Image Service files are installed in another location, type the path in the box, or click Choose . To restore the default folder path, click Restore Default Folder .
Pre-Installation Summary	Confirm the installer settings (install folder, components to install, and space needed for install), and click Install .

Installing the ALI HiPer BAM System

The ALI HiPer BAM System (also referred to as Celequest) connects to your back-end systems and triggers alerts by monitoring rule templates. The rule templates are created within Celequest and connected to HiPer for Retail via rules that are defined in HiPer for Retail.

Caution: The machine that hosts Celequest must include Java JDK 1.4.x to run JBoss. The Java JDK is available from <http://java.sun.com>. Once installed, set the JAVA_HOME environment variable to point to the installed location of the JDK.

If you have not already installed Celequest, perform the appropriate steps on the machine that you want to host the ALI HiPer BAM System (Celequest):

- For Windows, refer to “[Installing the ALI HiPer BAM System on Windows](#)” on page 3-6.
- For Linux, refer to “[Installing the ALI HiPer BAM System on Linux](#)” on page 3-8.

If you have already installed Celequest, refer to “[Upgrading Celequest to Version 3.7.2.0.326](#)” on page 3-10.

Installing the ALI HiPer BAM System on Windows

1. Copy the **HiPer_1.1_BAM_Service.zip** file (available in the AquaLogic User Interaction Product Center) to the host computer and unzip the files.
2. Create a new database. If you are running SQL Server, name the database `cq3_7_metadata`.
3. In **cqinitmetadata_cmd.bat** (located in `<BAM_Install_Folder>\CQInitMetadata\`), replace the database machine name, user name, and password; and comment out/uncomment lines based on your database type:

- For SQL Server, change the following lines:

```
java -cp cqinitmetadata.jar;msutil.jar;msbase.jar;mssqlserver.jar
com.celequest.metadata.upgrade.Upgrade SQLSERVER
"jdbc:microsoft:sqlserver://[INSERT SERVER NAME
HERE]:1433;SelectMethod=cursor;databaseName=cq3_7_metadata;user=[INS
ERT USER NAME HERE];password=[INSERT PASSWORD HERE]
```

- For Oracle, change the following lines:

```
java -cp cqinitmetadata.jar;ojdbc14.jar
com.celequest.metadata.upgrade.Upgrade ORACLE
jdbc:oracle:thin:<user>/<password>@<server>:<port...usually
1521>:<SID...e.g. PLUM10>
```

4. In **celequest_metadata-ds.xml** (located in `<BAM_Install_Folder>\jboss-3.2.6\server\default\deploy\`), replace the database machine name, user name, and password; and comment out/uncomment lines based on your database type:

- For SQL Server, change the following lines:

```
<connection-url>jdbc:microsoft:sqlserver://[INSERT SERVER NAME
HERE]:1433;SelectMethod=cursor;databaseName=cq3_7_metadata;user=[INS
ERT USER NAME HERE];password=[INSERT PASSWORD HERE]</connection-url>
```

and

```
<!-- The login and password -->
<user-name>[INSERT USER NAME HERE]</user-name>
<password>[INSERT PASSWORD HERE]</password>
```

- For Oracle, change the following lines:

```
<connection-url>jdbc:oracle:thin:celequest372/welcome@localhost:1521
:PLUM10</connection-url>
```

and

```
<!-- The login and password -->
<user-name>[INSERT USER NAME HERE]</user-name>
<password>[INSERT PASSWORD HERE]</password>
```

5. In **wrapper.conf** (located in <BAM_Install_Folder>\jboss-3.2.6\conf), replace the class path token for <BAM_system home> with the path to the BAM install folder.
6. Run **cqinitmetadata_cmd.bat** (located in <BAM_Install_Folder>\jboss-3.2.6\CQInitMetadata\) from the command line to create the metadata for the database:
7. Run **InstallApp-NT.bat** (located in <BAM_Install_Folder>\jboss-3.2.6\bin\) to install it as a Windows service.
8. Start the Windows service named **BEA ALI HiPer BAM System 3.7.2**.
9. Check the following logs:
 - server.log (located in <BAM_Install_Folder>\jboss-3.2.6\server\default\log\)
 - wrapper.log (located in <BAM_Install_Folder>\jboss-3.2.6\logs\)

If **wrapper.log** shows a port conflict exception, you must change the ports in **jboss-service.xml** (located in <BAM_Install_Folder>\jboss-3.2.6\server\default\conf\).

10. Check to make sure the application can start by browsing to the following URL: <http://localhost:8049/celequest/login/workbench.htm>. You will be asked to enter two paths for logging, as well as information for an SMTP server. Because you will later delete the E-mail delivery profile, you can enter inaccurate information for the SMTP server.

Installing the ALI HiPer BAM System on Linux

1. Copy the **HiPer_1.1_BAM_Service.zip** file (available in the AquaLogic User Interaction Product Center) to the host computer and unzip the files.
2. Create a new database. If you are running SQL Server, name the database cq3_7_metadata.
3. In **cqinitmetadata_cmd.sh** (located in <BAM_Install_Folder>/CQInitMetadata/), supply the appropriate variables and comment out/uncomment lines based on your database type. Here are the contents of the file:

```
#!/bin/sh
### ===== ###
##                                     ##
##   Celequest initialization script   ##
##                                     ##
### ===== ###

# Setup the JVM - make sure JAVA_HOME is properly set
if [ "x$JAVA_HOME" != "x" ]; then
    JAVA="$JAVA_HOME/bin/java"
else
    JAVA="java"
fi

# Setup the classpath
CQINIT_CLASSPATH="cqinitmetadata.jar"
SQLSERVER_CLASSPATH="$CQINIT_CLASSPATH:msutil.jar:msbase.jar:mssqlserver.jar"
ORACLE_CLASSPATH="$CQINIT_CLASSPATH:ojdbc14.jar"

# Connection string
SQLSERVER_CONNECTION_STRING="jdbc:microsoft:sqlserver://<server>:1433;SelectMethod=cursor;databaseName=cq3_7_metadata;user=<user>;password=<password>"
ORACLE_CONNECTION_STRING="jdbc:oracle:thin:<user>/<password>@<server>:<port>...usually 1521>:<SID>...e.g. PLUM10>"

# Execute the JVM
# Uncomment the exec statement depending on which database type you are updating
# SQL Server
exec $JAVA -classpath "$SQLSERVER_CLASSPATH"
com.celequest.metadata.upgrade.Upgrade SQLSERVER
"$SQLSERVER_CONNECTION_STRING"
# Oracle
#exec $JAVA -classpath "$ORACLE_CLASSPATH"
com.celequest.metadata.upgrade.Upgrade ORACLE
"$ORACLE_CONNECTION_STRING"
```


4. In **celequest_metadata-ds.xml** (located in `<BAM_Install_Folder>/jboss-3.2.6/server/default/deploy\`), replace the database machine name, user name, and password; and comment out/uncomment lines based on your database type:

- For SQL Server, change the following lines:

```
<connection-url>jdbc:microsoft:sqlserver://[INSERT SERVER NAME
HERE]:1433;SelectMethod=cursor;databaseName=cq3_7_metadata;user=[INS
ERT USER NAME HERE];password=[INSERT PASSWORD HERE]</connection-url>
```

and

```
<!-- The login and password -->
<user-name>[INSERT USER NAME HERE]</user-name>
<password>[INSERT PASSWORD HERE]</password>
```

- For Oracle, change the following lines:

```
<connection-url>jdbc:oracle:thin:celequest372/welcome@localhost:1521
:PLUM10</connection-url>
```

and

```
<!-- The login and password -->
<user-name>[INSERT USER NAME HERE]</user-name>
<password>[INSERT PASSWORD HERE]</password>
```

5. In **wrapper.conf** (located in `<BAM_Install_Folder>/jboss-3.2.6/conf/`), replace the class path token for `<BAM_system home>` with the path to the BAM install folder.
6. Run **cqinitmetada_cmd.bat** (located in `<BAM_Install_Folder>/jboss-3.2.6/CQInitMetadata/`) from the command line to create the metadata for the database:
7. Check the following logs:
 - `server.log` (located in `<BAM_Install_Folder>/jboss-3.2.6/server/default/log/`)
 - `wrapper.log` (located in `<BAM_Install_Folder>/jboss-3.2.6/logs/`)

If **wrapper.log** shows a port conflict exception, you must change the ports in **jboss-service.xml** (located in `<BAM_Install_Folder>/jboss-3.2.6/server/default/conf/`).

8. Check to make sure the application can start by browsing to the following URL: <http://localhost:8049/celequest/login/workbench.htm>. You will be asked to enter two paths for logging, as well as information for an SMTP server. Because you will later delete the E-mail delivery profile, you can enter inaccurate information for the SMTP server.

Upgrading Celequest to Version 3.7.2.0.326

You must use Celequest 3.7.2.0.326 with HiPer for Retail 1.1. If you already have an earlier version of Celequest installed, you must upgrade. You cannot upgrade a Celequest instance in-place. Instead, you must export from the existing Celequest environment and import into the 3.7.2.0.326 environment by performing the following steps in Celequest:

1. Export the existing Celequest database, without exporting data.
2. Uninstall the existing Celequest EAR file from the application server.
3. Drop the metadata database schema from the metadata database.
4. Create a new metadata database schema.
5. Run **cqinitmetadata.jar** to initialize the new metadata database.
6. Install the **CAS_jboss3.2.x.ear** file (located in `<BAM_system_home>\jboss-3.2.6\server\default\deploy`), and bring up the 3.7.2.0.326 version of Celequest.
7. Import into the Celequest 3.7.2.0.326 instance the export file from the previous Celequest instance.

Post-Installation

This chapter describes the following basic steps you take to configure and customize your AquaLogic HiPer Workspace for Retail deployment:

1. Create a connection between the BAM stem and the back-end systems you want to monitor. For details, see [“Integrate Your Back-End Systems with the ALI HiPer BAM System” on page 4-3](#).
2. Configure the delivery profile in the ALI HiPer BAM System so that alerts are correctly sent to HiPer for Retail. For details, see [“Configure the ALI HiPer BAM System to Communicate with HiPer for Retail” on page 4-6](#).
3. Set up the HiPer for Retail database:
 - a. Run the database scripts to create the HiPer for Retail tables and load seed data into them. For details, see [“Run the HiPer for Retail Database Scripts” on page 4-7](#).
 - b. Create categories for notifications and tips to help users find what they need. For details, see [“Create Custom Categories for Notifications and Tips” on page 4-7](#).
 - c. Show HiPer for Retail how the information returned by the ALI HiPer BAM System relates to your company’s hierarchical levels. For details, see [“Map ALI HiPer BAM System Levels to Your Company’s Hierarchical Levels” on page 4-8](#).
4. Import the HiPer for Retail information into Publisher. For details, see [“Migrate HiPer for Retail Information Into \(Publisher\)” on page 4-8](#).
5. Configure HiPer for Retail in the Administrative Portal:

- a. Import the portal objects needed by HiPer for Retail. For details, see [“Import HiPer for Retail Portal Objects” on page 4-9](#).
 - b. Configure the ALI HiPer BAM System connection information. For details, see [“Configure the ALI HiPer BAM System Connection Information” on page 4-9](#).
 - c. Add the **HiPer** folder to the Automation Service to run HiPer for Retail jobs. For details, see [“Configure the Automation Service to Run HiPer for Retail Jobs” on page 4-10](#).
 - d. Grant data source access to HiPer for Retail users so they can upload documents. For details, see [“Grant Data Source Access to HiPer for Retail Users” on page 4-10](#).
6. Perform the initial set up described in the *Administrator Guide for AquaLogic HiPer Workspace for Retail*.
- a. Configure and run a Profile Web Service to import user information into the portal for use by HiPer for Retail.
 - b. Configure activity rights to give users access to HiPer for Retail features.
 - c. Create any necessary groups and set security on imported HiPer for Retail portal objects.
 - d. Create any necessary subportals to display the appropriate HiPer for Retail user interface to your users.
 - e. Create rule templates on which to base rules in HiPer for Retail.
 - f. Optionally, you can customize the HiPer for Retail user interface.

Integrate Your Back-End Systems with the ALI HiPer BAM System

You must set up the ALI HiPer BAM System (Celequest) to communicate with your back-end systems (for example, an inventory database). The ALI HiPer BAM System can be integrated using several methods including TIBCO, JMS, and Web Services, but the following example describes the ALI HiPer BAM System communicating with a SQL database via a JDBC connection.

To integrate a SQL database via JDBC:

1. Create a **context-ds.xml** file in the **<BAM_system_home>\jboss\server\default\deploy** directory. Here is an example of the contents of that file:

```
<?xml version="1.0" encoding="UTF-8"?>

<datasources>

  <no-tx-datasource>

    <jndi-name>com.bea.context</jndi-name>

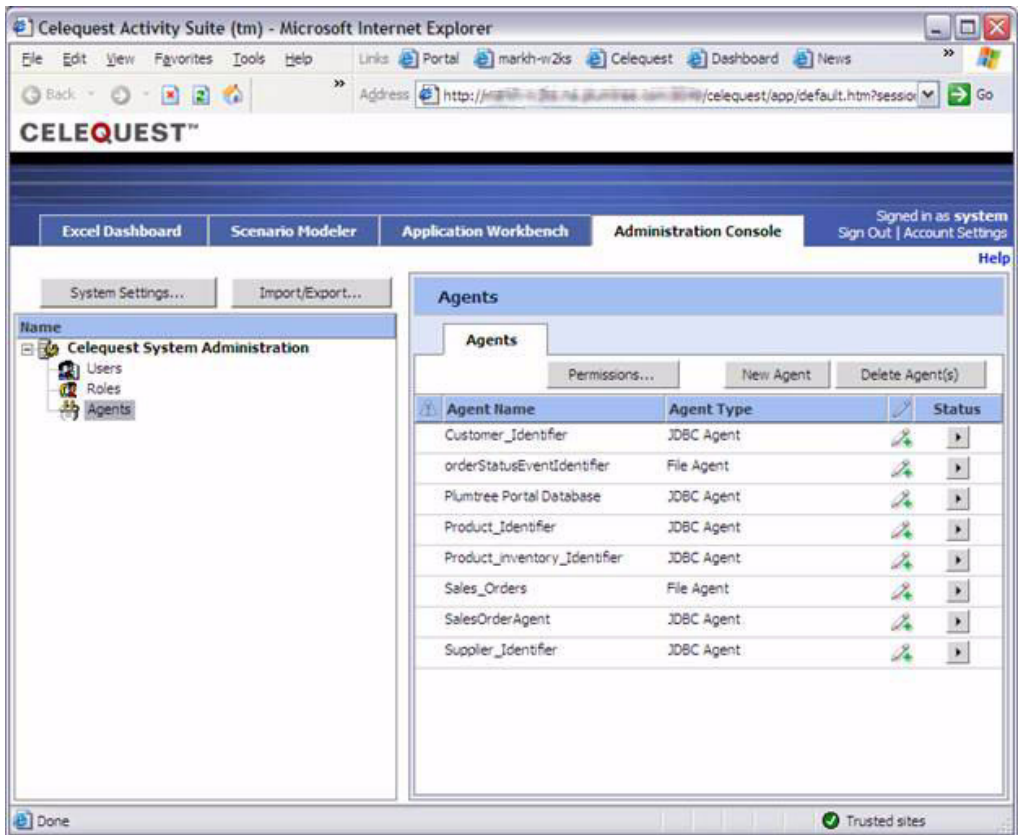
    <connection-url>jdbc:microsoft:sqlserver://hiper:1433;SelectMethod=cursor;
    databaseName=CFPortalDB;user=portaldbuser;password=portalpassword</c
    onnection-url>

    <driver-class>com.microsoft.jdbc.sqlserver.SQLServerDriver</driver-clas
    s>

    <!-- The login and password -->
    <user-name>portaldbuser</user-name>
    <password>portalpassword</password>
    <min-pool-size>5</min-pool-size>
    <max-pool-size>20</max-pool-size>
    <idle-timeout-minutes>5</idle-timeout-minutes>
    <track-statements>false</track-statements>
    <application-managed-security/>
  </no-tx-datasource>
</datasources>
```

2. After you create the context, restart the JBoss server. After restarting the server, the data source will appear in the ALI HiPer BAM System user interface. Next, you need to create an agent.
3. Log in to the ALI HiPer BAM System. For more information on any of the following steps, refer to Celequest documentation and online help.
4. Click the **Administration Console** tab.
5. Under Name, click **Agents**.

Figure 4-1 Agents



6. Click **New Agent**.
7. In the Edit Agent dialog box, create an agent that can talk to the back-end system.

Figure 4-2 Edit Agent Dialog Box

Celequest Activity Suite -- Web Page Dialog

Edit Agent Help

Agent Type:

Name: Status:

Description:

Agent Details

No details are required

Database Type:

User Name:

Password:

Max Rows Per Query:

Type of JDBC Connection:

JNDI Name for JDBC Source:

JNDI Properties:

Name	Value
<input type="text"/>	<input type="text"/>

8. Click **OK** to save your agent definition.
9. Repeat Steps 1-8 to create an agent for each back-end system that you want to monitor with the ALI HiPer BAM System.

Configure the ALI HiPer BAM System to Communicate with HiPer for Retail

When a rule is triggered within the ALI HiPer BAM System (Celequest), a SOAP message is sent. You must configure a delivery profile in the ALI HiPer BAM System so that HiPer for Retail receives the message. When HiPer for Retail receives a message, it determines if there are any notifications associated with the triggered rule. If there are associated notifications, they are sent to the appropriate users.

Perform the following steps on the machine that hosts the ALI HiPer BAM System to configure the delivery profile:

1. Log in to the ALI HiPer BAM System as “system.” For more information on any of the following steps, refer to Celequest documentation and online help.
2. Click **Account Settings**.
3. In the Edit User dialog box, click the **Delivery Profiles** tab.
4. Click **Create Additional Profiles**.
5. Select **web service** as the profile type.
6. In the **Profile Name** box, type a name such as “<hiperserver> Web Server.”
7. In the **Web Service URL** box, type a URL of
“http://<hiperserver>:<port>/hiperportlets/faces/portlets/webservice/web_service_endpoint.jsp.”
8. In the **Method** box, type “post.”
9. Leave the **Username** and **Password** boxes blank, but select **automatically add the profile to new alerts**.
10. Delete the existing E-mail delivery profile.

Set Up the HiPer for Retail Database

Perform the steps in this section to set up and customize your HiPer for Retail database.

Run the HiPer for Retail Database Scripts

Run the database scripts that were installed on the machine that hosts HiPer for Retail. The scripts are located in the HiPer for Retail install directory (for example, C:\Program Files\plumtree\pthiper\1.1\sql).

To run the database scripts, perform the following steps:

1. If you are using Oracle, you must set the NLS_LANG variable:
 - In Windows, set NLS_LANG=<oracle defined locale>.<charset>. For example:

```
set NLS_LANG=AMERICAN_AMERICA.UTF8
```
 - In Linux, export NLS_LANG=<oracle defined locale>.<charset>. For example:

```
export NLS_LANG=AMERICAN_AMERICA.UTF8
```
2. Run the scripts appropriate for your database software:
 - For Microsoft SQL Server, run the scripts in **\mssql**.
 - For Oracle on Windows, run the scripts in **\oracle_nt**.
 - For Oracle on Linux, run the scripts in **\oracle_unix**.

Run the scripts in the following order:

- a. If you are using Oracle, review the path and variables used in **create-tablespace.sql**, then run the script as a user that has sysdba rights. You must run this script before you run any other scripts.
- b. **create-tables.sql**
- c. **load-seed-info.sql**
- d. **triggers.sql**

Create Custom Categories for Notifications and Tips

When users create notifications and tips they can choose categories that help other users understand what the notification or tip is regarding. In the RTBUSCATEGORIES table, you must create categories that are appropriate for your company. Use the *Installation and Planning Worksheets for HiPer for Retail* to plan your categories.

Map ALI HiPer BAM System Levels to Your Company's Hierarchical Levels

When the ALI HiPer BAM System sends an alert to HiPer for Retail, HiPer for Retail needs to understand how the information in the alert relates to HiPer for Retail users so that it can correctly determine which users to notify. HiPer for Retail determines the appropriate users by querying users' EOD (Extended Object Data) properties in the portal.

For example, create a notification to send to all General Managers when a region's profit dips below 5%. If the West region profit dips, the ALI HiPer BAM System alerts HiPer for Retail of the change, including the fact that the change occurred in the West region. HiPer for Retail refers to the notification and determines that in this situation a message should be sent to all General Managers, limited by the region.

To allow HiPer for Retail to understand how the EOD properties in the portal relate to the levels in the ALI HiPer BAM System, you must modify the BAMNAME column values in the RTPROPERTYMAPPING table to match your company's hierarchical levels (for example, Level 2=Region). Use the *Installation and Planning Worksheets for HiPer for Retail* to plan your levels.

Migrate HiPer for Retail Information Into (Publisher)

Perform the following step to configure HiPer for Retail in Publisher:

1. Copy the .zip file from the computer that hosts HiPer for Retail, in **pthiper\1.1\serverpackages**, to the appropriate migration folder:
 - For Content Server 6.1, place the .zip file in **ptcs\6.1\settings\migration**.
 - For Publisher 6.2, place the .zip file in **ptcs\6.2\settings\migration**.

Configure HiPer for Retail on the Administrative Portal

Perform the following steps in the Administrative Portal.

Import HiPer for Retail Portal Objects

During the install an import package (**hiper_package.ptc**) was created in **pthiper\1.1\serverpackages**. You must import the package to create the portal objects needed by HiPer for Retail.

- If you are running Plumtree Corporate Portal 5.0.5, use the Portal Migration Utility. Refer to the migration instructions in the *Administrator Guide for Plumtree Corporate Portal 5.0.5*.
- If you are running Plumtree Foundation 6.0 SP1, use the Portal Export Utility. Refer to the migration instructions in the *Administrator Guide for Plumtree Foundation 6.0*.

Configure the ALI HiPer BAM System Connection Information

Use the HiPer Configuration Utility in the portal to set up the ALI HiPer BAM System (Celequest) information:

1. In the portal, click **Administration**.
2. In the Select Utility menu, click **HiPer Administration**.
3. On the HiPer Configuration Settings page, under Celequest Administrative Preferences:
 - a. In the **Celequest Server** box, type the URL for your ALI HiPer BAM System (for example, `http://<bamserver>:<port>/bam`).
 - b. In the **User Name** box, type the name of the user who will control the ALI HiPer BAM System (for example, system).
 - c. In the **Password** and **Confirm Password** boxes, type the password for the ALI HiPer BAM System user (for example, manager).
4. When you are done, click **OK**.

Configure the Automation Service to Run HiPer for Retail Jobs

HiPer for Retail includes the following jobs:

- Flat Hierarchy Update Job
- HiPer Dynamic Group Update Job
- Run Tip Synchronization
- Send Notifications

To learn about these jobs, refer to the *Administrator Guide for AquaLogic HiPer for Retail*.

Add the **HiPer** folder to the Automation Service, so that HiPer for Retail jobs will run:

1. In the portal, click **Administration**.
2. In the Select Utility menu, click **Automation Service**.
3. Add the **HiPer** folder to an existing Automation Service or create a new one (refer to Portal online help for details) and register the following folder: **Admin Objects Directory : Application Spaces : HiPer**.

Grant Data Source Access to HiPer for Retail Users

Grant read access to data sources for HiPer for Retail users so they can submit documents to HiPer for Retail:

1. In the portal, click **Administration**.
2. Navigate to and open a data source to which you want to grant access (for example, **Administrative Resources : World Wide Web**).
3. On the **Security** page, add the All HiPer Users group (found in **Application Spaces : HiPer : Users and Groups**) to the Security Settings list and change the Privilege to **Read** or higher.
4. When you are done, click **Finish**.

Note: If you create new data sources, remember to grant access to HiPer for Retail groups when appropriate.

You have completed the install, but you must now perform the initial set up described in the *Administrator Guide for AquaLogic HiPer Workspace for Retail* before your users can start using HiPer for Retail.

Upgrade

This chapter describes how to upgrade the components of your HiPer for Retail deployment.

To upgrade to the latest version of AquaLogic HiPer Workspace for Retail:

1. Check current hardware and software requirements and make any required upgrades to operating system or database software prior to proceeding with the upgrade. For details, see [Chapter 2, “Installation Prerequisites.”](#)
2. Upgrade the ALI HiPer BAM System (Celequest) to 3.7.2.0.326. For details, see [“Upgrading Celequest to 3.7.2.0.326” on page 5-2.](#)
3. Upgrade the HiPer for Retail components. For details, see [“Upgrading the HiPer for Retail Components” on page 5-2.](#)
4. Import the **hiper_package.pte** file into the portal. For details, see [“Importing the .pte File Into the Portal” on page 5-6.](#)
5. Run the **upgrade_1.0_to_1.1.sql** database update script to add a UUID column to the HiPer for Retail database to accommodate the new migration functionality. For details, see [“Upgrading the HiPer for Retail Database” on page 5-6.](#)
6. Run the **HiPerUpgrade.bat** file to add a UUIDs to existing objects in the HiPer for Retail database to accommodate the new migration functionality. For details, see [“Running the HiPerUpgrade.bat File” on page 5-6.](#)

Upgrading Celequest to 3.7.2.0.326

You must use Celequest 3.7.2.0.326 with HiPer for Retail 1.1. Because HiPer for Retail 1.0 required Celequest 3.7.0.27, you must upgrade. You cannot upgrade a Celequest instance in-place. Instead, you must export from the 3.7.0.27 environment and import into the 3.7.2.0.326 environment by performing the following steps in Celequest:

1. Export the 3.7.0.27 database, without exporting data.
2. Uninstall the 3.7.0.27 EAR file from the application server.
3. Drop the metadata database schema from the metadata database.
4. Create a new metadata database schema.
5. Run **cqinitmetadata.jar** to initialize the new metadata database.
6. Install the **CAS_jboss3.2.x.ear** file (located in <BAM_system_home>\jboss-3.2.6\server\default\deploy), and bring up the 3.7.2.0.326 version of Celequest.
7. Import into the Celequest 3.7.2.0.326 instance the export file from the Celequest 3.7.0.27 instance.

Upgrading the HiPer for Retail Components

This section describes how to upgrade the following HiPer for Retail components:

- HiPer for Retail files - includes updated software and the database scripts needed for upgrade.
- Portal files - includes a new .pte file with new HiPer for Retail object data.
- Image Service files - includes updated help files.
- Automation Service files - includes a new automated HiPer for Retail task.

The HiPer for Retail components can be installed on different hosts. For details on provisioning hosts for the various components, see the *Deployment Guide for BEA AquaLogic User Interaction*.

Launching the HiPer for Retail Installer

Note: You can upgrade AquaLogic Interaction HiPer for Retail 1.0 to 1.1 running on Windows and running against Plumtree Corporate Portal 5.0.5 or Plumtree Foundation 6.0 SP1. No other upgrade paths are supported.

To launch the HiPer for Retail installer:

1. Log into the Windows host as the local Administrator.
2. Copy the installer to a temporary location:
 - If you are running Plumtree Corporate Portal 5.0.5, use **AquaLogicInteractionHiPer.exe**.
 - If you are running Plumtree Foundation 6.0 SP1, use **AquaLogicInteractionHiPer_G6.exe**.
3. Close all unnecessary windows and applications.
4. Double-click the installer.

Complete the installation wizard panels as described in [“Completing the Installer Wizard Pages” on page 5-4](#), and according to the settings you planned when you completed the configuration worksheets provided in the *Installation and Planning Worksheets for HiPer for Retail*.

Completing the Installer Wizard Pages

The following table describes the HiPer for Retail installer wizard pages.

Note: If the installer setting does not apply to the components you are installing, the installer does not display the wizard page.

Table 5-1 HiPer for Retail Installer Wizard Pages for Linux and Windows

Wizard Page	Description
Introduction	Click Next .
License Agreement	Read and accept the agreement.
Choose Components	In the Install Set drop-down list, select either Complete or Custom . If you select Complete , a full set of HiPer for Retail components is installed. If you select Custom , you can choose individual components to install according to your deployment plan.
Installation Folder	Specify where you want HiPer for Retail installed. The default is C:\Program Files\plumtree. If you want to install in another folder, type the path in the box, or click Choose . If you change your mind and want to install in the default folder, click Restore Default Folder .
Choose Portal Server Folder	Specify where the portal is installed. The default installation folder for Plumtree Corporate Portal 5.0.5 is C:\Program Files\plumtree\ptportal\5.0; the default installation folder for Plumtree Foundation 6.0 SP1 is C:\Program Files\plumtree\ptportal\6.0. If the portal is installed in another location, type the path in the box, or click Choose . To restore the default folder path, click Restore Default Folder .
Choose Automation Server Folder	Specify where the Automation Service is installed. The default installation folder for Plumtree Corporate Portal 5.0.5 is C:\Program Files\plumtree\ptportal\5.0; the default installation folder for Plumtree Foundation 6.0 SP1 is C:\Program Files\plumtree\ptportal\6.0. If the Automation Service is installed in another location, type the path in the box, or click Choose . To restore the default folder path, click Restore Default Folder .
AquaLogic HiPer Workspace for Retail - Application Port	Specify the port through which HiPer for Retail should handle requests (for example, http://<hiperportal>:<port>). The default port is 11970.

Table 5-1 HiPer for Retail Installer Wizard Pages for Linux and Windows

Wizard Page	Description
Document Repository Service	<p>Specify the following connection information for your Document Repository Service:</p> <ul style="list-style-type: none"> Document Repository Service Host - enter the fully qualified domain name Document Repository Service Port - enter the port through which the Document Repository Service handles requests <p>This page only displays if you are running Plumtree Foundation 6.0 SP1.</p>
HiPer Database	Choose your database server— SQL Server or Oracle .
HiPer Database Connection Information	<p>Enter the following values:</p> <ul style="list-style-type: none"> HiPer Database Host Computer HiPer Database Port HiPer Database Name (for Oracle, this is the database SID) HiPer Database Login (for Oracle, this is the database schema user) HiPer Database Password (for Oracle, this is the database schema password) HiPer Database Password Confirmation
Portal Database Connection Information	<p>Enter the following values:</p> <ul style="list-style-type: none"> Portal Database Host Computer Portal Database Port Portal Database Name (for Oracle, this is the database SID) Portal Database Login (for Oracle, this is the database schema user) Portal Database Password (for Oracle, this is the database schema password) Portal Database Password Confirmation
Choose Image Server Folder	Specify where you the Image Service files are installed. The default is C:\Program Files\plumtree\ptimages. If the Image Service files are installed in another location, type the path in the box, or click Choose . To restore the default folder path, click Restore Default Folder .
Pre-Installation Summary	Confirm the installer settings (install folder, components to install, and space needed for install), and click Install .

Importing the .pte File Into the Portal

During the install an import package (**hiper_package.pte**) was created in **pthiper\1.1\serverpackages**. You must import the package to create the portal objects needed by HiPer for Retail.

- If you are running Plumtree Corporate Portal 5.0.5, use the Portal Migration Utility. Refer to the migration instructions in the *Administrator Guide for Plumtree Corporate Portal 5.0.5*.
- If you are running Plumtree Foundation 6.0 SP1, use the Portal Export Utility. Refer to the migration instructions in the *Administrator Guide for Plumtree Foundation 6.0*.

Upgrading the HiPer for Retail Database

You must run a database script to add a UUID column to the HiPer for Retail database to accommodate the new migration functionality. The upgrade scripts are located in the HiPer for Retail install directory (for example, C:\Program Files\plumtree\pthiper\1.1\sql). Run the script appropriate for your database software:

- For Microsoft SQL Server, run **\sql\mssql\upgrade_1.0_to_1.1.sql**.
- For Oracle on Windows, run **\oracle_nt\upgrade_1.0_to_1.1.sql**.
- For Oracle on Linux, run **\oracle_unix\upgrade_1.0_to_1.1.sql**.

Running the HiPerUpgrade.bat File

You must run **HiPerUpgrade.bat** to add UUIDs for existing objects in the HiPer for Retail database to accommodate the new migration functionality. The .bat file is located in the Automation Service install directory (for example, if you are running Plumtree Corporate Portal 5.0.5, it is located in C:\Program Files\plumtree\ptportal\5.0\scripts; if you are running Plumtree Foundation 6.0 SP1, it is located in C:\Program Files\plumtree\ptportal\6.0\scripts).

Uninstall

This chapter describes how to uninstall the components of your HiPer for Retail deployment.

1. Start the uninstaller:
 - For Windows, from Add/Remove Programs remove **AquaLogic HiPer Workspace for Retail** or run **Uninstall AquaLogic HiPer Workspace for Retail.exe** (located in <HiPer_for_Retail_Install_Directory>\uninstall\pthiper\1.1\).
 - For Linux, run **Uninstall_AquaLogic_HiPer_Workspace_for_Retail** (located in <HiPer_for_Retail_Install_Directory>/uninstall/pthiper/1.1/).
2. On the Uninstall AquaLogic HiPer Workspace for Retail page, click **Uninstall**.
3. On the Uninstall Complete page, review any items that could not be removed.

Uninstall

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