



BEA AquaLogic® Interaction Portlet Framework - Microsoft Excel

Installation and Upgrade Guide

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Welcome

The BEA AquaLogic Interaction Portlet Framework - Microsoft Excel provides an interface that allows portal users to create customized portal Web Services that access Microsoft Excel files. The interface can be customized to meet the needs of a variety of users.

How to Use This Book

This book describes how to install and deploy AquaLogic Interaction Portlet Framework - Microsoft Excel 1.2. It also provides instructions for upgrading to Excel Portlet Framework 1.2 from earlier versions.

Audience

This guide is written for the user responsible for installing or upgrading Excel Portlet Framework. This user must have an understanding of the existing portal deployment, knowledge of how to administer objects in the portal, and knowledge of Microsoft Excel.

Organization

This guide includes the following chapters:

- This chapter provides information on how to use this guide and describes other resources available to help install, deploy, upgrade, and administer Excel Portlet Framework.
- [Chapter 2, “Pre-Installation Procedures”](#) provides hardware and software requirements, as well as environmental and third-party software prerequisites. You must read this chapter and meet the prerequisites prior to proceeding to the installation or upgrade.

- [Chapter 3, “Installing Software”](#) provides detailed instructions for installing Excel Portlet Framework.
- [Chapter 4, “Post-Installation Procedures”](#) provides detailed instructions for configuring Excel Portlet Framework.
- [Chapter 5, “Registering Excel Portlet Framework with the Portal”](#) provides detailed instructions for registering Excel Portlet Framework in the portal and configuring the file types, content crawlers, and security for Excel Portlet Framework.
- [Chapter 6, “Upgrading Software”](#) provides instructions for upgrading to Excel Portlet Framework 1.2.
- [Chapter 7, “Uninstalling Software”](#) provides instructions for uninstalling Excel Portlet Framework.

Typographical Conventions

This book uses the following typographical conventions.

Table 1-1 Typographical Conventions

Convention	Typeface	Examples/Notes
<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. • The log files are stored in the logs folder. • To save your changes, click Apply Changes.
<ul style="list-style-type: none"> • Text you enter 	computer	Type Marketing as the name of your community.
<ul style="list-style-type: none"> • Variables you enter 	computer with angle brackets (<>)	Enter the base URL for the Remote Server. For example, http://<my_computer>.
<ul style="list-style-type: none"> • New terms • Emphasis • Object example 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 other documentation and resources provided by BEA.

Table 1-2 BEA Documentation and Resources

Resource	Description
Installation Worksheet	<p>This worksheet helps you to gather and record prerequisite information necessary for installing AquaLogic Interaction Portlet Framework - Microsoft Excel.</p> <p>It is available on edocs.bea.com and on the application CD.</p>
User Guide	<p>This book describes how to create and configure portlets with the Excel Portlet Framework.</p> <p>It is available on edocs.bea.com and on the application CD.</p>
Release Notes	<p>These files are written for Excel Portlet Framework administrators. They include information about new features and known issues in the release.</p> <p>They are available on edocs.bea.com and on the application CD.</p>
Online Help	<p>The online help is written for all levels of Excel Portlet Framework users. It describes the user interface for Excel Portlet Framework and gives detailed instructions for completing tasks in Excel Portlet Framework.</p> <p>To access online help, click the help icon.</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 AquaLogic User Interaction deployment.</p> <p>It is available in electronic form (PDF) on edocs.bea.com.</p>

Table 1-2 BEA Documentation and Resources

Resource	Description
AquaLogic User Interaction Support Center	<p>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>Technical Support Center</p> <p>Submit and track support incidents and feature requests, search the knowledge base, access documentation, and download service packs and hotfixes.</p> <p>User Group</p> <p>Visit the User Group section to collaborate with peers and view upcoming meetings.</p> <p>Product Center</p> <p>Download products, read Release Notes, access recent product documentation, and view interoperability information.</p> <p>Developer Center</p> <p>Download developer tools and documentation, get help with your development project, and interact with other developers via BEA's dev2dev Newsgroups.</p> <p>Education Services</p> <p>Find information about available training courses, purchase training credits, and register for upcoming classes.</p> <p>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.</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.A. +1 866.262.PLUM (7586) or +1 415.263.1696</p> <p>Europe +44 1494 559127</p> <p>Australia/NZ +61 2.9923.4030</p> <p>Asia Pacific +61 2.9931.7822</p> <p>Singapore +1 800.1811.202</p>

Welcome

Pre-Installation Procedures

This section describes the following pre-installation steps that will ensure a successful installation:

1. Download the most up-to-date documentation from edocs.bea.com.
2. Read the 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. Uninstall any previous versions of this product. For details, see [Chapter 7, “Uninstalling Software.”](#)
4. Ensure your deployment components conform to supported specifications. For details, see [“Hardware and Software Requirements” on page 2-2.](#)
5. Provision dependent resources and install dependent software before you install this software.
6. Organize the information needed for the installation process by completing the Installation Worksheet for AquaLogic Interaction Portlet Framework - Microsoft Excel.
7. Configure a Windows user to own the Excel Framework Web Service. For details, see [“Configuring Privileges for the Excel Framework Remote Server Windows User” on page 2-3.](#)
8. Enable Active Server Pages. For details, see [“Enable Active Server Pages” on page 2-3.](#)
9. **(optional)** If you plan to deploy the application to IIS 6.0 using 5.0 isolation mode, set up this configuration for your deployment. For details, see [“Configuring IIS 6.0 for the Installation” on page 2-4.](#)

Hardware and Software Requirements

This section provides hardware and software requirements for running Excel Portlet Framework.

Note: For the most current platform support information, refer to the Interoperability Matrix in Product Center.

The following table summarizes the hardware, operating system, and software requirements for Excel Portlet Framework.

Component	Requirement
Remote Server Host Computer	<p>Operating System</p> <ul style="list-style-type: none"> Microsoft Windows 2000 Server SP4, Microsoft Windows 2003 Server, Microsoft Windows 2003 Server SP1 <p>Software</p> <ul style="list-style-type: none"> IIS 6.0 with .NET 1.1 SP1, IIS 6.0 (in 5.0 Isolation Mode), IIS 5.0 Microsoft Excel 2000 or 2003. <p>Note: BEA recommends the standard installation, with GIF translation installed for charts. For information on minimum Excel requirements, see Knowledge Base article 11361.</p> <ul style="list-style-type: none"> Plumtree ASP Gadget Development Kit (GDK) 3.5 and above
Portal Compatibility	AquaLogic Interaction 6.1
Network	You must be able to configure communication between the Remote Server and the portal.
Client Browser	<ul style="list-style-type: none"> Firefox 1.0, 1.5, 2.0 Internet Explorer 6.0, 7.0 Netscape 7.2, 8.0 Safari 1.3, 2.0

You can use the *Installation Worksheet for AquaLogic Interaction Portlet Framework - Microsoft Excel* to note your configuration information for required components.

Configuring Privileges for the Excel Framework Remote Server Windows User

The Excel Framework Remote Server must have a Windows domain user associated with it that has permission to run the portal remote server as a Windows service.

To meet this requirement, BEA recommends you create a dedicated user in the relevant domain named **ptexcel_user** and assign this user full Administrator rights.

If you do not want to assign the user full Administrator rights, follow the procedures in this section to configure the specific rights and permissions required to enable the user to run the Excel Framework Remote Server as a Windows service.

To configure registry access privileges for the **ptexcel_user** account:

1. Follow Windows documentation to create a user named **ptexcel_user** in the domain to which the Excel Framework Remote Server host computer belongs.
2. Log in to the Excel Framework Remote Server host computer as a local administrator that has rights to assign privileges.
3. Follow Windows documentation to grant the **ptexcel_user** account the following rights and privileges:
 - DefaultAccessPermission (a distributed component object model (DCOM) Default Security property)
 - DefaultLaunchPermission (a distributed component object model (DCOM) Default Security property)
 - Act as part of the operating system (a Local Security Policy setting)
 - Log on as a service (a Local Security Policy setting)
4. Restart the computer to initialize the permissions.

Enable Active Server Pages

To enable Active Server Pages:

1. In IIS manager, right-click the **Web Service Extensions** folder.
2. Choose **Allow all Web service extensions for a specific application**.
3. In the Application drop-down menu, choose **Active Server Pages**.

4. Click **OK**.

Configuring IIS 6.0 for the Installation

(optional) If your environment requires running Microsoft IIS 6.0 in 5.0 isolation mode, perform the following before you install the product files:

1. Configure IIS to run in 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**.
 - c. Enable ASP applications in Web Service Extensions
2. Configure request handling for Web extensions:
 - a. In IIS Manager, expand the local computer and click **Web Service Extensions**.
 - b. Use the controls to change permissions for Active Server Pages from prohibited to allowed.
3. Stop and then restart IIS.

Installing Software

This section describes the following steps that ensure successful installation:

1. Verify that you have completed the installation prerequisites. For details, see [Chapter 2, “Pre-Installation Procedures.”](#)
2. Install product files on the Remote Server host.

Installing Product Files

The Excel Portlet Framework is a Remote Server in the context of the portal platform. This section describes how to install product files on the Remote Server host computer.

To install product files on the Remote Server host:

1. Log in to the Remote Server host computer as ptexcel_user, the user you created in [“Configuring Privileges for the Excel Framework Remote Server Windows User”](#) on page 2-3.
2. Open Microsoft Excel, accept the license agreement, and respond to any dialog boxes to clear them.
3. Copy the installation package to a location on the Remote Server host computer.
4. To launch the installer, click the ALIPortletFrameworkExcel_v1-2.exe file in the top-level directory of the installation package. <version> is a number that identifies the release.
5. Complete the installation wizard pages as described in the following table.

Note: To facilitate any troubleshooting that might be required, as well as communication among IT staff and customer support, BEA recommends that you keep the default settings

Wizard Page	Description
License Agreement	Read and accept the license agreement. Then click Yes .
Choose Destination Location	Click Next to accept the default: <PT_HOME>\Excel Portlet Framework By default, PT_HOME is C:\bea\alui.
ALI Remote Server Alias	This field defines the name of the virtual directory for the Remote Server. Click Next to accept the default: ExcelGS. If the wizard detects that this directory already exists, it will not let you specify the name again. Remember to uninstall previous versions of this product before installing the new version. For information on uninstalling this product, see Chapter 7, “Uninstalling Software.” Click Next .
Domain	Allow the wizard page a few moments to populate a list of domains visible to your current logged-in session. Select the domain that includes the ptexcel_user account. For information on configuring the ptexcel_user account, see “Configuring Privileges for the Excel Framework Remote Server Windows User” on page 2-3. Click Next .
Windows user name password	Enter the user name ptexcel_user and the corresponding password. The password cannot be empty. For information on configuring the ptexcel_user account, see “Configuring Privileges for the Excel Framework Remote Server Windows User” on page 2-3 Click Next to begin installation of product files.

6. When installation is complete, a status window appears. Click **Finish** to close the window.

Post-Installation Procedures

This section describes the following post-installation steps:

1. Modify IIS 6.0 settings. For details, see [Modifying IIS Settings](#).
Note: If you use IIS 5.0, you do not need to complete the procedures in this section.
2. Configure the default settings for Excel Framework Remote Server. For details see [“Configuring Default Remote Server Settings” on page 4-2](#).
3. Start the BEA ALI Excel Service. For details, see [“Configuring the Remote Server to Start Automatically” on page 4-3](#).
4. Run a diagnostic test that is provided to verify successful installation. For details, [“Verifying Successful Installation” on page 4-4](#).

Modifying IIS Settings

If you use IIS 5.0, you do not need to complete the procedures in this section.

Complete the following steps to verify the Excel Chart Downloader filter is properly configured:

1. From the Internet Information Services Manager, right-click the Web Sites and choose **Properties**.
2. Click the ISAPI tab and verify that the status arrow for the Excel Chart Downloader is green. If so, the ISAPI filter has been installed correctly.
3. If the status arrow is red, select the Excel Chart Downloader filter and click **Edit**.

4. In the Executable section, click **Browse** and select the following file that is installed by the installation wizard: <PT_HOME>Excel Portlet Framework\ExcelChartDownloader.dll
5. Click **OK**, **Apply**, and then **OK**.
6. Right-click the Default Web Site and choose **Properties**.
7. Click the ISAPI tab and verify that the status arrow is green.

Complete the following steps to enable parent paths for the ExcelGS application:

1. From the Internet Information Services Manager, right-click the ExcelGS virtual directory and choose **Properties**.
2. Click the Virtual Directory tab and then the **Configuration** button.
3. Click the Options tab, select Enable Parent Paths, and click **OK**.
4. Stop and restart IIS.

Configuring Default Remote Server Settings

The installation wizard installs a control panel on the local host for the Remote Server. You use this control panel to configure default settings for the Remote Server.

To configure default settings for the Remote Server:

1. From the Control Panel, open the ALI Excel Framework control panel.

2. Configure the settings described in the following table.

Control	Description
Location of File Store	<p>Type the location where uploaded Excel files, cache files and chart images used by Excel Portlet Web Services will be stored. You can specify a UNC or a local path.</p> <p>Choose the location thoughtfully. Consider the following:</p> <ul style="list-style-type: none"> • A local path might be faster, but there must be sufficient room for the files used by the Portlet Web Services. • Excel files often contain secure or confidential information and you must give Excel portlet users read and write access for the folder you select. • If you are upgrading from a previous version of the Portlet Framework, use the same location as your previous installation.
Cryptographer key	<p>In the box, type a string to be used as a key in the encoding and decoding of passwords. Acceptable values include strings from 4 to 20 characters of ASCII letters and numerals.</p> <p>If you are upgrading from a previous version of the Framework, use the same cryptography key found in the include\constants.asp file.</p>
Maximum Excel file size	Type a number of MB.
Minimum cache update interval	Type a number of minutes. Portlets do not access linked files until the expiration time has elapsed.
Maximum number of columns allowed in a Portlet	Type a number according to your preference.
Enable Formatting	Select this option if you plan to support custom formatting for Excel. For information on formatting, see <i>User Guide for AquaLogic Interaction Portlet Framework - Microsoft Excel</i> .

3. To apply changes, restart IIS.

Configuring the Remote Server to Start Automatically

The installation wizard installs the Windows service for the Remote Server, but does not start the service. After you have run the installer, start the service for the first time and configure it to start automatically.

To start the Windows Service for the Remote Server:

1. Open the Services console in Windows.
2. Right-click the BEA ALI Excel Service and choose **Start**.
3. To configure the service to start automatically, right-click the BEA ALI Excel Service, choose properties, and, from the Startup Type drop-down list, choose **Automatic**.

Verifying Successful Installation

The installation wizard installs a diagnostic tool that verifies all components have been installed and are configured to communicate correctly with the portal.

To run the installation verification tool, browse to the location of the diagnostic tool in a browser, for example: <http://localhost:<port>/excelGS/gadget/test.asp>

Note: If you cannot open the session from the Remote Server host computer, specify the fully qualified domain name for Remote Server host computer in place of localhost.

The diagnostic tool verifies installation and configuration for the following components:

- ASP Gadget Development Kit (GDK) Components (Settings and Localization)
- BEA ALI Excel Service, configuration file, and file store components
- File Store component
- Active File components
- Impersonator and Cryptographer components

Registering Excel Portlet Framework with the Portal

After you have run the installation wizard and verified your installation, you must register the Remote Server and new portlets with the portal by importing the Excel Portlet Framework package.

To import the portlet package into the portal:

1. Log into the Administrative Portal.
2. Click **Administration**.
3. From the Select Utility drop-down choose **Migration - Import**.
4. Click **Browse** and locate the PortletFrameworkExcel.pte file in <PT_HOME>\Excel Portlet Framework\serverpackages.
5. Click **Open**.
6. Click **Load Package**.
7. Check the box next to Overwrite Remote Servers.
8. Click **Finish**.
9. In the Admin Objects directory, open the directory into which the portlet framework objects were imported and click the name of the Remote Server object.

The Remote Server object's Main Settings page appears.

10. In the Base URL box, replace the @REMOTE_SERVER@ token with the name of the host computer for the Remote Server.

Registering Excel Portlet Framework with the Portal

Upgrading Software

This section describes how to upgrade this product. It also describes the impact component upgrades have on the use of this product.

Upgrading Framework for Excel Software

The following sections describe how to upgrade to the current version.

Upgrading from 1.1 or 1.1.x to the Current Version

To upgrade from version 1.1 or 1.1.x to the current version:

1. Note your settings for the cryptographer password and file store location in the Plumtree Excel Service Control Panel.
2. Note the virtual directory used by the current 1.1 Framework installation.
3. Back up the file store to a secure location.
4. Uninstall previous software from the Remote Server host computer. Follow the procedures in [Chapter 7, “Uninstalling Software.”](#)
5. Install software on the Remote Server host computer. Follow the procedures in [Chapter 3, “Installing Software.”](#)
6. Perform post-installation tasks according to [Chapter 4, “Post-Installation Procedures.”](#) When you configure, specify the information you noted for the previous installation before you uninstalled it.

7. Restore the file store.
8. Verify your installation. Follow the procedures in [“Verifying Successful Installation” on page 4-4.](#)

Upgrading from a Pre-1.1 Version to the Current Version

To upgrade from a pre-1.1 version to the current version:

1. Note your settings for the cryptographer password in `\include\constants.asp`.
2. Note the Root Path variable in `winnt\system32\PTFileStore.cfg`.
3. Back up the file store to a secure location.
4. Uninstall previous software from the Remote Server host computer. Follow the procedures in [Chapter 7, “Uninstalling Software.”](#)
5. Install software on the Remote Server host computer. Follow the procedures in [Chapter 3, “Installing Software.”](#)
6. Complete the post-installation procedures described in [Chapter 4, “Post-Installation Procedures.”](#) When you configure these settings, specify the information you noted for the previous installation before you uninstalled it.
7. Restore the file store.
8. Verify your installation. Follow the procedures in [“Verifying Successful Installation” on page 4-4.](#)

Note: New instances of the Excel Gadget Managers recognize Gadget Web Services created with the previous version of the Framework. If previous Excel Gadget Web Services are locked after completing the upgrade, unlock them using the Release Item Locks utility in Administration.

Upgrading Deployment Components

The following table summarizes the impact of upgrades to deployment components on the successful use of this product:

Component	Upgrade Issue
Remote Server host computer operating system	If you upgrade the operating system for the Remote Server host computer, back up the file store to a remote location before you install the new operating system. After you re-install the Framework for Excel program, restore the file store to the location you prefer and use the ALI Excel Framework Control Panel to ensure the Remote Server configuration is correct.
Microsoft Excel installation on the Remote Server host computer	No additional steps are necessary when you upgrade to Microsoft Excel 2000 or Microsoft Excel 2003. Note: Make sure to open the Microsoft Excel application after installation and clear initialization dialog boxes.
Portal	The utilities BEA provides for portal upgrades account for the impact on remote services. If your Remote Server exists in a 4.5 or 4.5 WS portal deployment that is being migrated to 5.0.x, the upgrade has no impact on the Remote Server. However, you will notice that the upgrade utility removes the Excel Gadget Manager from the Portal Server database because it is not needed in portal 5.0.x

Upgrading Software

Uninstalling Software

This section describes how to uninstall the Excel Portlet Framework.

Note: If you are uninstalling the current software as part of your upgrade process, make sure you have backed up the file store. For upgrade procedures, see [“Upgrading Software” on page 6-1](#).

1. On the Remote Server host computer:
 - a. Delete the file store. You specified a location for the file store during your previous installation and setup. When you delete the file store, you delete all uploaded Excel files and all associated metadata about linked files, as well as all the cached ranges and chart images. If you are upgrading and want to restore the file store after completing the upgrade, back up the file store before you delete it from its current location.
 - b. From the Internet Services Manager, remove the IIS virtual directory for the Excel Framework. The default name for the virtual directory is ExcelGS.
 - c. Remove the ISAPI filter from IIS. From Internet Services Manager, right-click the Default Web Site and choose Properties. Choose the Excel Chart Downloader and click **Remove**.
 - d. Use the Windows Control Panel Add/Remove Programs utility to uninstall the software.

Uninstalling Software

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