



BEA AquaLogic® Interaction Content Service - Microsoft Exchange

Installation and Upgrade Guide

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Welcome

AquaLogic Interaction Content Service - Microsoft Exchange enables you to include Microsoft Exchange content in your portal from repositories inside or outside your network. Portal administrators can then create remote content sources and remote content crawlers that access Microsoft Exchange.

How to Use This Book

This book describes how to install and deploy AquaLogic Interaction Content Service - Microsoft Exchange 5.2. It also provides instructions for upgrading to Exchange CS 5.2 from earlier versions.

Audience

This guide is written for the user responsible for installing or upgrading Exchange CS. This user must have an understanding of the existing portal deployment, knowledge of how to administer objects in the portal, and knowledge of the security required for your Microsoft Exchange system.

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 Exchange CS.
- [Chapter 2, “Completing Pre-Installation Steps,”](#) 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 or Upgrading Exchange CS,”](#) provides detailed instructions for installing, upgrading, and configuring Exchange CS.
- [Chapter 4, “Importing, Configuring, and Creating Exchange CS Objects in the Portal,”](#) provides detailed instructions for importing, configuring, and creating Exchange CS objects in the portal.
- [Chapter 5, “Uninstalling AquaLogic Interaction Content Service - Microsoft Exchange,”](#) provides instructions for uninstalling Exchange CS.

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
Release Notes	<p>These files are written for AquaLogic Interaction Content Service - Microsoft Exchange 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 Exchange CS users. It describes the user interface for Exchange CS and gives detailed instructions for completing tasks in Exchange CS.</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

Completing Pre-Installation Steps

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. Provision host computers for your deployment and install prerequisite software. For details, see “[Hardware and Software Requirements](#)” on page 2-1.
4. Create and configure a Windows user for running Exchange CS content crawler jobs. For details, see “[Creating a Windows User for Exchange CS](#)” on page 2-3.

Hardware and Software Requirements

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.

Completing Pre-Installation Steps

The following table summarizes the hardware, operating system, and software requirements for Exchange CS.

Component	Requirement
Exchange CS Host Computer	Hardware <ul style="list-style-type: none">• 512 MB memory• 128 MB disk space Software <ul style="list-style-type: none">• Operating System: Microsoft Windows 2000 Server SP4, 2003 Server SP1• Application Server: IIS 5.0, IIS 6.0• Microsoft Exchange Client: Microsoft Outlook 2000, 2002, 2003
Exchange Server	<ul style="list-style-type: none">• Microsoft Exchange Server 2003 or Microsoft Exchange 6.5• Microsoft Exchange Server 2000 or Microsoft Exchange 6.0• Microsoft Exchange 5.5
Network	<p>You must be able to configure communication between the remote server, the portal, and the Microsoft Exchange Server.</p> <p>If the Microsoft Exchange Server is located on a computer outside of the portal and remote server domain, you must configure trust relations between domains.</p>
Portal Software	AquaLogic Interaction 6.1
Client Browser	<ul style="list-style-type: none">• Internet Explorer 6.0, 7.0• Netscape 7.2, 8.0• Firefox 1.0, 1.5, 2.0• Safari 1.3, 2.0

Administrative User Requirements

The installation and configuration of Exchange CS components require the following administrative user permissions.

User	Permissions
Local Host Administrator Account	To install Exchange CS components, you must log in to the host computer as the local administrator.
Portal Database and Portal Administrative User Accounts	To configure the required portal database and portal administrative objects, you must provide the user name and password for the appropriate administrative user accounts.

Creating a Windows User for Exchange CS

To create and configure a Windows user for use with Exchange CS:

1. Create a Windows user named `ali-exchangeecs-user` and provision an account for this user on the Microsoft Exchange Server. This administrative user runs the crawl jobs, so you should create the account for this purpose only.
2. On the remote server host computer, log in as `ali-exchangeecs-user`, open Microsoft Outlook and dismiss any initialization screens.
3. Configure Microsoft Outlook as the default mail client for `ali-exchangeecs-user`.
4. Make sure `ali-exchangeecs-user` can access all the Microsoft Exchange folders you want to crawl.
5. To test connectivity between the Microsoft Outlook client and the Microsoft Exchange Server, send mail from `ali-exchangeecs-user` to `ali-exchangeecs-user`.

Note: Exchange CS does not send or receive mail. This step is only a test.

Completing Pre-Installation Steps

Installing or Upgrading Exchange CS

This section describes the following steps that ensure successful installation:

1. Verify that you have completed the pre-installation procedures. For details, see [“Completing Pre-Installation Steps” on page 2-1](#).
2. Install product files on the remote server host. For details, see [“Installing or Upgrading Product Files” on page 3-1](#).

Installing or Upgrading Product Files

AquaLogic Interaction Content Service - Microsoft Exchange is implemented as a remote server in the context of the portal deployment. You install the product on a remote server host computer that can communicate with the portal. Except in the case of a development or test environment, the remote server host computer should not host the AquaLogic Interaction portal application. For host specifications, see [“Hardware and Software Requirements” on page 2-1](#).

Note: If you have previously installed Exchange CS, we recommend uninstalling the earlier files before installing the current version.

To install product files:

1. Log in to the host computer as the local host administrator.
2. Close all applications.
3. Copy the installation package (**ALContentService-Exchange_v5-2.exe**) to a location on the remote server host.

4. Launch the installer by double-clicking **ALIContentService-Exchange_v5-2.exe**.
5. In the Location to Save Files dialog box, accept the default folder. These files are copied to your computer temporarily for the installation and will be removed when you complete installation.
6. 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, we recommend that you keep the default settings.

Wizard Page	Description
Welcome	Click Next .
Choose Destination Location	<p>Accept the default installation location or browse to another directory. Then click Next.</p> <p>The default is the value that you set for PT_HOME, for example C:\bea\alui.</p>
Select Web Site Type	<ul style="list-style-type: none"> • Use Default Web Site - The default Web site listens on port 80. • Use Another Web Site - You will specify the Web site details on the next page of the installer. <p>Specify if you want to use the default Web site. If you choose to use the default Web site, you will automatically skip the next wizard page.</p> <p>Then click Next.</p>
Select Web Site	<ul style="list-style-type: none"> • Enter a name for the Web site so that you are able to identify the Web site in IIS. <p>Note: If you have not previously installed Web services on this computer, the default name is ptws. We also recommend that all Content Services and Identity Services on the same host computer be deployed in the same location.</p> <ul style="list-style-type: none"> • Enter port numbers for regular and secure access. The defaults are 8082 and 9002. <p>Then click Next.</p>
Select Web Site Security	<p>Specify HTTP or HTTPS. If you specify HTTPS, you must configure HTTPS according to the documentation provided by your SSL vendor and implement a valid digital certificate.</p> <p>Then click Next.</p>

Wizard Page	Description
Internet Alias	Specify the alias for the host computer Web services. The default is http://<RemoteServer>:8082 . We recommend you accept the default. Then click Next .
Windows Domain	Enter the domain that contains ali-exchangecws-user, the user you created in “Completing Pre-Installation Steps” on page 2-1 . Then click Next .
ALI user Windows Password	Enter ali-exchangecws-user and the corresponding password. This is the user you created in “Completing Pre-Installation Steps” on page 2-1 . Then click Next .

7. On the Pre-Installation Summary page, click **Install** to begin installation.
8. Click **Done** to exit the installer and restart your computer.

Installing or Upgrading Exchange CS

Importing, Configuring, and Creating Exchange CS Objects in the Portal

After you have run the installation wizard and verified correct installation, import, configure, and create Exchange CS objects in the portal.

Complete the following steps:

- Copy the online help files from the remote server host computer to the Image Server. For example, copy the contents of **C:\bea\alui\WebServices\Exchange\help\50** to **<ImageService>\ptimages\imageserver\webservices\exchange**.

For Java portals, the path separator is a forward slash (/).

- Import the remote server and content Web service. For details, see [“Importing the Remote Server and Content Web Service” on page 4-2](#)
- Map Exchange CS file types. For details, see [“Mapping File Types” on page 4-3](#).
- Configure Exchange CS security. For details, see [“Configuring Security” on page 4-3](#).
- Create a content source. For details, see [“Creating a Content Source” on page 4-4](#).
- Create a content crawler. For details, see [“Creating a Content Crawler” on page 4-4](#).
- Create a job. For details, see [“Creating a Job” on page 4-5](#).

Importing the Remote Server and Content Web Service

Import the Exchange CS remote server and content Web service into the portal using the Object Migration utility:

1. On the computer that hosts the portal application, map or mount a network drive connection to the Exchange CS host computer or copy files to an accessible directory.
2. Log in to the portal as an administrator.
3. Click **Administration**.
4. From the Select Utility menu, select **Migration - Import**.
5. Browse to the migration package. If you accepted installation defaults, the location is:
\\<RemoteServer>\bea\alui\serverpackages\ExchangeWSOAndRemoteServer.pte
6. Click **Load Package**.
7. Select **Overwrite Remote Servers**.
8. Click **Finish**.
9. Open the **Exchange CS** folder.
10. Expand the Remote Server section and click the **Exchange CS** remote server.
11. On the Main Settings page of the Remote Server Editor, in the **Base URL** box, replace CHANGE_ME with the name of the remote server that hosts Exchange CS.
12. Click **Finish**.

Stay logged in to the portal for the next procedure.

Mapping File Types



To map Microsoft Exchange file types to portal file types, import the Exchange CS content types into the portal using the Object Migration utility:

1. From the Select Utility menu, select **Migration - Import**.
2. Browse to the migration package. If you accepted installation defaults, the location is:
`\\<RemoteServer>\bea\alui\serverpackages\MSExchangeCrawlerGlobalObjects.pte`
3. Click **Load Package**.
4. Click **Finish**.

Stay logged in to the portal for the next procedure.

Configuring Security

To configure security settings for the Exchange CS:

1. Deploy an authentication source (for example, LDAP) to manage Microsoft Exchange users. For details, refer to Microsoft Exchange documentation.
2. Create a remote authentication source in the portal to import the Microsoft Exchange users. For details, refer to the portal's online help or the *Administrator Guide for AquaLogic Interaction*.
3. Configure the Global ACL Sync Map to associate the Microsoft Exchange domain name with the authentication source:
 - a. Log in to the portal as an administrator.
 - b. Click **Administration**.
 - c. From the Select Utility menu, select **Global ACL Sync Map**.
 - d. Click  **Add Mapping** and choose the authentication source you created in step 2.
 - e. In the **Domain Name** column, click  and enter the domain name of the Microsoft Exchange users.
 - f. Click **Finish**.
4. Open the **Exchange CS** folder.

5. Expand the Web Service section and click the **Exchange CS** Web service.
6. On the left, under Edit Object Settings, click **Advanced Settings**.
7. Select **Supports importing security with each document**.
8. Click **Finish**.

You will configure additional security settings in the Content Crawler Editor as described in [“Creating a Content Crawler” on page 4-4](#).

Stay logged in to the portal for the next procedure.

Creating a Content Source

Create a content source to define the area of Microsoft Exchange from which you want to import content. To create a content source, perform the following steps in the portal’s Administrative Object Directory:

1. Open the **Exchange CS** folder.
2. From the Create Object menu, select **Content Source - Remote**.
3. In the Choose Web Service dialog box, choose the **Exchange CS** Web service.
4. Configure the content source as described in the online help.

Stay logged in to the portal with the Exchange CS folder open for the next procedure.

Creating a Content Crawler


Create a content crawler to import content from the content source. To create a content crawler, perform the following steps in the Exchange CS folder of the portal’s Administrative Object Directory:

1. From the Create Object menu, select **Content Crawler - Remote**.
2. In the Choose Content Source dialog box, choose the content source you created in the previous procedure.
3. On the Main Settings page of the Content Crawler Editor, select **Import security with each document**. Configure the rest of the content crawler as described in the online help.

Stay logged in to the portal with the Exchange CS folder open for the next procedure.

Creating a Job

To import content, you must associate the content crawler with a job and run the job. To create and run a job, perform the following steps in the Exchange CS folder of the portal's Administrative Object Directory:

1. From the Create Object menu, select **Job**.
2. Click  **Add Operation**.
3. Choose the content crawler created in the previous procedure.
4. Choose the scheduling values for the job and click **Finish**.
5. Name the job and click **OK**.
6. When you are finished creating the job, make sure the Exchange CS folder is associated with an automation service. For assistance, see the online help under **Select Utilities | Automation Service**.

Importing, Configuring, and Creating Exchange CS Objects in the Portal

Uninstalling AquaLogic Interaction Content Service - Microsoft Exchange

1. Use the Windows Add/Remove Programs utility to remove the Exchange CS software from your remote server. The uninstaller removes the war files and Java application files that were installed. After the uninstallation process has completed, it is safe to delete the installation directory.
2. Remove the deployed application from the application server according to its documentation.
3. After the removal process has completed, it is safe to delete the any directories created for the Exchange CS in the application server environment.

Uninstalling AquaLogic Interaction Content Service - Microsoft Exchange

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