BEA AquaLogic® Interaction SharePoint Console

Installation and Upgrade Guide

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CHAPTER 1

Welcome

This book describes how to install and deploy AquaLogic Interaction SharePoint Console 1.1. It also provides instructions for upgrading to SharePoint Console 1.1 from earlier versions.

How to Use This Book

This guide has detailed instructions suitable for users with installation experience as well as users installing for the first time.

Audience

This guide is written for the user responsible for installing or upgrading SharePoint Console. This user must have strong knowledge of the platform operating system, database, web and application servers, and any other third-party software required for installation.

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 SharePoint Console.
- Chapter 2, "Installation Prerequisites," 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, "Installation," provides detailed instructions for installing and configuring SharePoint Console.
- Chapter 4, "Upgrade," provides detailed instructions for upgrading to SharePoint Console 1.1.
- Appendix A, "Licensing," provides information on how to configure licensing for SharePoint Console.
- Appendix B, "Uninstalling," provides instructions for uninstalling SharePoint Console.

Typographical Conventions

This book uses the following typographical conventions.

Table 1-1 Typographical Conventions

Convention	Typeface	Examples/Notes
• Items you need to take action on (such as files or screen elements)	**bold**	• Upload **Procedures.doc** to the portal. • To save your changes, click **Apply Changes**.
• User-defined variables • New terms • Emphasis • Object example names	*italic*	• The migration package file is located in *install_dir*\serverpackages. • *Portlets* are Web tools embedded in your portal. • The URI *must* be a unique number. • The example Knowledge Directory displayed in Figure 5 shows the *Human Resources* folder.

• Text you enter
• Computer generated text (such as error messages)
• Code samples
	`computer`	• Type `Marketing` as the name of your community.
		• This script may generate the following error: `ORA-00942 table or view does not exist`
		• Example:
		`<setting name="SSOCookieIsSecure">`
		`<value xsi:type="xsd:integer">0</value>`
		`</setting>`

• Environment variables	ALL_CAPS	• The default location of BEA_HOME is C:\bea.

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	The release notes provide information about new features, issues addressed, and known issues in the release. They are available on edocs.bea.com/alui/ali/docs61 and on any physical media provided for delivering the application.
Administrator Guide	This guide describes how to manage and maintain SharePoint Console. It is available on edocs.bea.com/alui/ali/docs61.
Online Help	The online help is written for all levels of SharePoint Console users. It describes the user interface for SharePoint Console and gives detailed instructions for completing tasks in SharePoint Console. To access online help, click the help icon.
Deployment Guide	This guide is written for business analysts and system administrators. It describes how to plan your AquaLogic User Interaction deployment. It is available on edocs.bea.com/alui/deployment/index.html.
Developer Guides, Articles, API Documentation, Blogs, Newsgroups, and Sample Code	These resources are provided for developers on the BEA dev2dev site (dev2dev.bea.com). They describe how to build custom applications using AquaLogic User Interaction and how to customize AquaLogic User Interaction products and features.

Table 1-2 BEA Documentation and Resources

Resource	Description
AquaLogic User Interaction (ALUI) and AquaLogic Business Process Management (ALBPM) Support Center	The ALUI and ALBPM Support Center is a comprehensive repository for technical information on ALUI and ALBPM 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 ALUI and ALBPM-related needs. The Support Center encompasses the following communities: **Technical Support** Submit online service requests, check the status of your requests, search the knowledge base, access documentation, and download maintenance packs and hotfixes. **User Group** Participate in user groups; view webinars, presentations, the CustomerConnection newsletter, and the Upcoming Events calendar. **Product Center** Download product updates, maintenance packs, and patches; view the Product Interoperability matrix (supported third-party products and interoperability between products). **Developer Center** Download developer tools, view code samples, access technical articles, and participate in discussions. **Education Services** Review the available education options, then choose courses by role and delivery method (Live Studio, Public Classroom Training, Remote Classroom, Private Training, or Self-Paced eLearning). **Profile Center** Manage your implementation details, local user accounts, subscriptions, and more. If you do not see the Support Center when you log in to http://support.plumtree.com, contact ALUISupport@bea.com or ALBPMSupport@bea.com for the appropriate access privileges.

Table 1-2 BEA Documentation and Resources

Resource	Description
Technical Support	If you cannot resolve an issue using the above resources, BEA Technical Support is happy to assist. Our staff is available 24 hours a day, 7 days a week to handle all your technical support needs. E-mail: ALUIsupport@bea.com Phone Numbers: U.S.A. +1 866.262.PLUM (7586) or +1 415.263.1696 Europe +44 1494 559127 Australia/NZ +61 2.9923.4030 Korea +82 27676 888 Singapore +1 800.1811.202

CHAPTER 2

Installation Prerequisites

Before you run the installer, complete the following steps:

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 and on edocs.
3. Provision host machines and configure software dependencies for your deployment. For details on software requirements, see Hardware and Software Requirements.

Hardware and Software Requirements

Note: For the most current platform support information, refer to the Interoperability Matrix in the Product Center at support.plumtree.com. For more information on the role of SharePoint Console as a part of your complete AquaLogic User Interaction deployment, refer to the *Deployment Guide for BEA AquaLogic User Interaction*.

Caution: IPv6 is not supported. You should verify that IPv6 is not enabled prior to installing SharePoint Console

The following table describes the hardware, operating system and software requirements for SharePoint Console.

Table 2-1 Hardware and Software Requirements

Component	Requirement
SharePoint Console Host Machine	**Hardware** • 1.6 GHz or higher, with 2 MB L2 cache • 512 MB memory • 128 MB disk space **Operating System** • Microsoft Windows 2003 Server SP1 or R2, SP2, on x86 **Application Server** • Microsoft IIS 6.0 with .NET Framework 2.0
Microsoft SharePoint	• Microsoft Office SharePoint Server 2007 • Windows SharePoint Services 2.0, 3.0
Portal	• Plumtree Foundation 6.0, 6.0 SP1 • BEA AquaLogic Interaction 6.1, 6.1 MP1

CHAPTER 3

Installation

This chapter describes how to install SharePoint Console. If you are upgrading SharePoint Console, see Chapter 4, "Upgrade."

To install SharePoint Console:

1. Verify that you have completed the installation prerequisites. For details, see Chapter 2, "Installation Prerequisites."
2. Install the SharePoint Console components. For details, see "Installing the SharePoint Console Components" on page 3-1.
3. Verify the installation. For details, see "Verifying the Installation" on page 3-4.

Installing the SharePoint Console Components

This section describes how to install the SharePoint Console components. The SharePoint Console components are:

- Image Service files
- SharePoint Console

Note: If the Image Service is installed on a machine other than the SharePoint Console host machine, you must also run the installer on that machine to install the Image Service component. For a non-Windows image service host, you must manually deploy the image service files. For more information, see "Manually Deploying the Image Service Files" on page 3-3.

Launching the SharePoint Console Installer

To launch the SharePoint Console installer:

1. Log in to the Windows host as the local Administrator.
2. Copy the **ALISharePointConsole_v1-1.exe** installer to a temporary location.
3. Close all unnecessary windows and applications.
4. Double-click **ALISharePointConsole_v1-1.exe** to launch the installer.

The installer wizard will launch. Complete the installer wizard pages as described in the next section.

Completing the Installer Wizard Pages

The following table describes the SharePoint Console installer wizard pages. The wizard pages that appear vary according to the selections you choose.

Note: If .NET Framework 2.0 is not installed on the SharePoint Console host machine, the installer will display an error message. It is possible to complete the installation but this is not recommended as SharePoint Console will not function properly.

Table 3-1 SharePoint Console Installer Wizard Pages

Wizard Page	Description
Introduction	Click **Next** to begin the installation. Click **Cancel** on any wizard page to end the installation.
License Agreement	Read and accept the license agreement.
Choose Components	Select the components you want to install on this machine.
Choose Install Folder	Accept the default installation folder or select a different folder in which to install the SharePoint Console component.
License Directory	Enter the path to the location where you want to store the license.bea file. This location must be in BEA_HOME. Default: `C:\bea`

Table 3-1 SharePoint Console Installer Wizard Pages

Existing License Update	**Note:** This panel appears if a license.bea file exists in the location specified in the License Directory panel. Select **Merge License** to merge an evaluation license with the existing license. Select **Overwrite License** to overwrite the existing license with an evaluation license. The installer places a backup of the existing license in BEA_HOME. Select **Leave Alone** to leave the existing license. For more complete details on license types and combining license keys, see Appendix A, "Licensing."
Fully Qualified Domain Name	Enter the fully qualified domain name of the host you are installing on. Example: `mycomputer.mydomain.com`
Select IIS Web Site	• **Use Default Web Site** - Choose this option to create a virtual directory under the Default Web site. The default Web site listens to port 80. • **Use another Web site** - If you choose to use another Web site, the next wizard page allows you to enter the Web site name and port numbers. **Caution:** Do not install SharePoint Console to the same Web site that hosts an instance of WSS. The default configuration of a Web site that hosts WSS will disable SharePoint Console. SharePoint Console can be installed to a Web site other than the Web site hosting WSS on the same machine.
Specify IIS Web Site Information	Enter the **IIS Web Site Name**, **IIS Web Site Port**, and **IIS Web Site Secure Port** for your non-Default Web Site. Click **Next**.
Path to Image Service Files	Enter the location of the portal image service files.
Image Service URL	Enter the URL to the Image Service, including the port number if it is not 80 or 443. Example: `http://web-apps.portal.com:8082/imageserver`
Pre-Installation Summary	Review the installation configuration information for accuracy. When satisfied with the installation settings, click **Install**.

Manually Deploying the Image Service Files

For any portal image service located on a non-Windows host, you must deploy the SharePoint Console image service files manually. The image service files can be found in compressed packages on the host where you installed the SharePoint Console component.

To manually deploy the image service files:

1. Copy the appropriate compressed package to the image service host. The packages are located in the directory **PT_HOME\ptsharepointcsw\1.1\packages** on the host where you installed the SharePoint Console service components. The two packages contain the same files, compressed in different fashions:
   - **imageserver_windows.zip**
   - **imageserver_unix.tar.gz**
2. Extract the compressed package to your image service folder. The default directory for the image service is **PT_HOME/ptimages/imageserver**.

Verifying the Installation

To verify the SharePoint Console service components have been installed, use the Windows Internet Information Services Manager to verify the SharePoint Console virtual directories have been installed.

1. From Administrative Tools, open the **Internet Information Services Manager**.
2. In the IIS Web site you specified when installing the SharePoint Console, these three virtual directories should be present: **SharePointCWS**, **CustomSearch**, and **SiteFeed**.

Importing the SharePoint Console Migration Package

This section describes how to import the SharePoint Console migration package. Importing the SharePoint Console package creates portal objects such as Web services, content sources, and intrinsic portlets used by SharePoint Console.

To import the SharePoint Console .pte file:

1. Verify that the AquaLogic Interaction Search Service is running.

2. From the Administration Select Utility drop-down list, use the **Migration - Import** utility to import the **SharePoint_Console.pte** file, which is located in the following location on the SharePoint Console host machine:

   – **PT_HOME\ptsharepointcws\1.1\packages**

   Select **Overwrite Remote Servers**. If necessary, adjust any import settings.

For details on using the Migration - Import utility, see *Administration Guide for BEA AquaLogic Interaction*.

CHAPTER 4

Upgrade

This chapter describes the process of upgrading from a previous version of SharePoint Console to the current version.

Upgrading from SharePoint Console 1.0 to SharePoint Console 1.1

To upgrade from SharePoint Console 1.0 to SharePoint Console 1.1:

1. Back up your existing SharePoint Console installation directories, **PT_HOME\ptsharepointcws** and **PT_HOME\ptcustomsearch**.

1. Run the SharePoint Console installer. For details, see "Launching the SharePoint Console Installer" on page 3-2.

   Note: The installer will detect the location of your previous SharePoint Console installation. When prompted by the installer, choose a new installation directory if you want to install SharePoint Console 1.1 to a location other than that of your existing SharePoint Console installation.

2. Verify the installation. For details, see "Verifying the Installation" on page 3-4.

3. Import the SharePoint Console migration package. For details, see "Importing the SharePoint Console Migration Package" on page 3-4.

APPENDIX A

Licensing

This appendix describes how licensing is configured for SharePoint Console. It contains the following sections:

- "Licensing Overview" on page A-1
- "Installation Behavior" on page A-2
- "Upgrade Behavior" on page A-3
- "Upgrading an Existing License" on page A-3
- "Merging License Keys" on page A-3
- "Example - License File" on page A-4

Licensing Overview

In order to function, SharePoint Console requires a valid license key on each SharePoint Console server in the environment. The license file containing this key must be located in the BEA_HOME directory. By default, BEA_HOME is C:\bea.

Depending on your use case, a different type of license is used. Each license type is defined by the license attributes that govern the behavior of the licensed installation. The following table lists

the license types, the most important attributes for each type, and how the license should be obtained.

Table A-1 Use Cases and Corresponding License Types

License Type	Key Attribute	Obtainment Method
Standard Evaluation	Expiration Days: Standard Evaluation licenses will expire 30 days from the date of installation. Units: Standard Evaluation licenses will allow a single execution of a crawler to import up to 50 SharePoint items.	Standard Evaluation licenses are automatically generated by the SharePoint Console installer.
Production	IP: Production licenses are only valid on a specific IP or within a specific IP range.	Existing customers can obtain Production licenses through elicense.bea.com or licensing@bea.com.

Installation Behavior

By default, the installer attempts to install a Standard Evaluation license file containing a SharePoint Console key in the BEA_HOME directory.

If a license.bea file exists in the specified location, then the installer prompts you to merge a Standard Evaluation license with the existing license, overwrite the existing license with a Standard Evaluation license, or leave the existing license alone. If you elect to overwrite the existing license, then the installer places a backup of the existing license into the BEA_HOME directory.

If you are installing SharePoint Console on a machine with another BEA product on it (for example, BEA WebLogic Server, AquaLogic Interaction, AquaLogic Interaction Analytics, or AquaLogic Interaction Grid Search), choose to merge the license files when prompted by the installer.

Upgrade Behavior

Subsequent installs of a SharePoint Console instance obey the same logic described in the Installation Behavior section. When upgrading to a new major or minor version of SharePoint Console, it is necessary to upgrade the license file. When prompted by the installer during upgrade, choose to merge the license files if there are other BEA products installed on the machine. Choose to overwrite the existing license file with a Standard Evaluation license if only SharePoint Console is installed on the machine. For details on merging license files, see "Merging License Keys."

When installing the new Production license key, you do not need to run the installer again to change license keys; you only need to replace the existing license file with the new version's license file, then restart your SharePoint Console instance. For details, see "Upgrading an Existing License."

Upgrading an Existing License

If you are upgrading an existing license to a Production license, you can either combine the license keys or replace the existing license file with the new license file.

If you are upgrading a license on a machine with another BEA product on it (for example, BEA WebLogic Server, AquaLogic Interaction, AquaLogic Interaction Analytics, or AquaLogic Interaction Grid Search), you must merge the license keys for both products into a single file. For more information on merging license keys, see "Merging License Keys."

Merging License Keys

To manually combine two or more license keys into the license.bea file, either use a text editor or the tool provided in BEA_HOME.

By default:

- C:\bea\UpdateLicense.cmd

The path to java.exe must be in the PATH variable. Use the following command to execute the tool:

- `UpdateLicense.cmd <new_license_file>`

Replace `<new_license_file>` with the name of the file containing the license key you wish to add to license.bea.

Example - License File

The following is an example of a license.bea file with a SharePoint Console Evaluation key:

```
<?xml version="1.0" encoding="ISO-8859-1"?>
<bea-licenses>
    <license-group format="1.0" product="AquaLogic Interaction SharePoint
Console" release="1.1">
        <license
            component="Crawler"
            cpus="unvalued"
            expiration="never"
            expiration_days="30"
            ip="any"
            licensee="BEA Evaluation Customer"
            serial="616351266349-2404064437963"
            type="EVAL"
            units="50"
            users="unlimited"
signature="MCwCFBa49QxGIwZOOUAeNE2tMu/HnbFgAhRnQ7XHShXQfQIFthYVMsYUV3a6nw=
="
        />
</license-group>
</bea-licenses>
```

APPENDIX B

Uninstalling

This appendix describes how to uninstall the components of the SharePoint Console.

To uninstall the SharePoint Console:

1. Use the Windows Add/Remove Programs utility to launch the uninstaller.
2. On the Uninstall SharePoint Console page, click **Next**.
3. On the Uninstall Complete page, confirm successful uninstallation. The SharePoint Console installation directory and virtual directories are removed by the uninstaller.

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