



BEA AquaLogic® Interaction Content Service - Windows Files

Installation and Upgrade Guide

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Welcome

AquaLogic Interaction Content Service - Windows Files (Windows Files CS) enables you to include Windows file system 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 Windows files.

How to Use This Book

This book describes how to install and deploy AquaLogic Interaction Content Service - Windows Files 6.1. It also provides instructions for upgrading to Windows Files CS 6.1 from earlier versions.

Audience

This guide is written for the user responsible for installing or upgrading Windows Files 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 Windows file 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 Windows Files 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 and Configuring Windows Files CS Components,”](#) provides detailed instructions for installing and configuring Windows Files CS.
- [Chapter 4, “Importing, Configuring, and Creating Windows Files CS Objects in the Portal,”](#) provides detailed instructions for importing, configuring, and creating Windows Files CS objects in the portal.
- [Chapter 5, “Advanced Configuration,”](#) provides instructions for editing advanced settings in the configuration file.
- [Chapter 6, “Upgrading and Uninstalling Windows Files CS,”](#) provides instructions for uninstalling Windows Files 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.
Text you enter	computer	Type Marketing as the name of your community.
Variables you enter	computer with angle brackets (<>)	Enter the base URL for the Remote Server. For example, http://<my_computer>/.
<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 Content Service - Windows Files.</p> <p>It is available on edocs.bea.com and on the application CD.</p>
Release Notes	<p>These files are written for AquaLogic Interaction Content Service - Windows Files 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>

Table 1-2 BEA Documentation and Resources

Resource	Description
Online Help	<p>The online help is written for all levels of Windows Files CS users. It describes the user interface for Windows Files CS and gives detailed instructions for completing tasks in Windows Files 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 data-bbox="413 392 1233 565">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="413 578 680 604">Technical Support Center</p> <p data-bbox="413 618 1220 673">Submit and track support incidents and feature requests, search the knowledge base, access documentation, and download service packs and hotfixes.</p> <p data-bbox="413 687 536 713">User Group</p> <p data-bbox="413 727 1224 753">Visit the User Group section to collaborate with peers and view upcoming meetings.</p> <p data-bbox="413 767 573 793">Product Center</p> <p data-bbox="413 807 1210 862">Download products, read Release Notes, access recent product documentation, and view interoperability information.</p> <p data-bbox="413 876 595 902">Developer Center</p> <p data-bbox="413 916 1233 972">Download developer tools and documentation, get help with your development project, and interact with other developers via BEA's dev2dev Newsgroups.</p> <p data-bbox="413 986 610 1012">Education Services</p> <p data-bbox="413 1025 1181 1081">Find information about available training courses, purchase training credits, and register for upcoming classes.</p> <p data-bbox="413 1095 1184 1182">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>

Completing Pre-Installation Steps

This chapter 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.

Complete the following basic steps to prepare your network and host computers for deployment:

1. Download the most up-to-date documentation from edocs.bea.com.
2. 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.
3. Provision host computers for your deployment and install prerequisite software. For details, see “[Hardware and Software Requirements](#)” on page 2-2.
4. Organize the information needed for the installation process by completing the *Installation Worksheet for AquaLogic Interaction Content Service - Windows Files*.
5. Ensure that you have administrative access to the resources you need to complete installation and configuration tasks. For details, see “[Administrative User Requirements](#)” on page 2-3.
6. Register your .NET extensions in IIS. For details, see “[Registering .NET Extensions in IIS](#)” on page 2-4.

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.

The following table summarizes the hardware, operating system, and software requirements for AquaLogic Interaction Content Service - Windows Files.

Table 2-1 Hardware and Software Requirements

Component	Requirement
Windows Files CS Host Computer	Hardware <ul style="list-style-type: none">• 512 MB memory• 128 MB disk space Operating System <ul style="list-style-type: none">• Microsoft Windows 2003 Server SP1 Software <ul style="list-style-type: none">• IIS 6.0• .Net 1.1 with hotfixes KB 824629 and KB 839462• MDAC 2.7.1.90
Portal Software	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

Administrative User Requirements

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

Table 2-2 Administrative User Permissions

User	Permissions
Local Host Administrator Account	The installing user must have local administrative rights. You must log in to the host computer as the local administrator.
Valid NT User	The installer requests the domain, user name, and password for a valid NT user. If you are installing in the same domain as your portal server, you can enter the ALUI user created during the portal installation.

Configuring IIS

Before installing Windows Files CS, you must configure IIS to work with your installation.

Registering .NET Extensions in IIS

The Windows Files CS installer expects .NET extensions to be registered and allowed in IIS.

To register .NET extensions from the command line, run the following:

```
<appropriate directory for v1.1.4322 framework>\aspnet_regiis.exe -i
```

To allow ASP.NET 1.1.4322 extensions:

1. Open IIS Manager by selecting it from **Programs | Administrative Tools | Internet Information Services Manager**.
2. In the left pane of the IIS Manager expand the node for the Web server and click **Web Service Extensions**.
3. In the right pane, view a list of Web service extensions and the status (**Prohibited** or **Allowed**) for each. Right-click on the extension name and select **Allow** to enable it.

Installing and Configuring Windows Files CS Components

This chapter describes the steps you take to install Windows Files CS. It includes the following topics:

- [“Installing Windows Files CS” on page 3-2.](#)
- [“Manually Deploying Image Service Files for a Non-Windows Portal” on page 3-4.](#)
- [“Setting Up Security Rights” on page 3-4.](#)
- [“Verifying the Security Library” on page 3-5.](#)

Installing Windows Files CS

To install Windows Files CS, perform the following steps on the remote server that hosts your AquaLogic Interaction Web services:

1. Log on to the remote server as the local administrator.
2. Close all programs.
3. Launch the installer by double-clicking **ALIContentServiceWindowsFiles_v6-1.exe**.
4. Complete the installation wizard pages as described in the following table and according to the settings you planned when you completed the *Installation Worksheet for AquaLogic Interaction Content Service - Windows Files*.

Table 3-1 Installer Wizard Page

Wizard Page	Description
Introduction	Click Next .
Choose Components	<p>Choose the components that you want to install.</p> <ul style="list-style-type: none"> • Choose Content Service for Windows Files to install the Windows Files CS on the remote server. • Choose Image Service Files to place the Windows Files CS image service files on your Image Service. <p>Then click Install.</p>
Choose Install Folder	Accept the default installation location (C:\bea\alui) or browse to another directory. Then click Next .
Specify Image Service Folder	The default location is C:\bea\alui\ptimages . If your Image Service is located in a different directory, enter it here. Then click Next .
Fully Qualified Domain Name	Enter the fully qualified domain name for your host computer.

Table 3-1 Installer Wizard Page

Wizard Page	Description
Select IIS Web Site	<p>Specify if you want to use the default Web site:</p> <ul style="list-style-type: none">• Use Default Web Site - Choose this option to create a virtual directory called ntcws in the Web directory http://<RemoteServer>/ntcws. The default Web site listens on port 80.• Use another Web site - You will specify the Web site particulars on the next page.
Specify IIS Web Site Information	<p>If you selected to use another Web site, specify the information for that site:</p> <ul style="list-style-type: none">• IIS Web Site Name - Enter the name of the site on which you want to deploy the Windows Files CS.• IIS Web Site Port - If necessary, change the port for this site. The default port is 8082.• IIS Web Site Secure Port - If necessary, change the secure port for this site. The default port is 9092.

5. On the Pre-Installation Summary page, click **Install** to begin installation.

Note: You must restart your computer before you can use the Windows Files CS.

Note: IIS must be running in order to complete the remaining tasks. If IIS does not begin automatically, start it manually before continuing with the remaining steps.

Manually Deploying Image Service Files for a Non-Windows Portal

If you are installing on a non-Windows portal, follow the directions below to manually deploy the Image Service files.

1. Navigate to the **images** directory on the computer on which you installed Windows Files CS. The default installation location is: **C:\bea\alui\ptntcws\6.1\images**
2. Move the **imageserver50.tgz** file to the location where the Image Service is installed.
3. Decompress the .tgz file.
4. Navigate to the directory where the Image Service is installed and confirm that there is a **Webservices** folder underneath.
5. Untar the .tar file into the directory where the Image Service is installed. This step puts files into the **<ImageService>/Webservices/file** folder.

Setting Up Security Rights

Verify that the user has write access to the directory where Windows Files CS is installed. Use the following steps if you need to add a user.

1. From the **Start** menu, select **Settings | Control Panel | Administrative Tools**.
2. Double-click **Local Security Policy**.
3. Expand the **Local Policies** folder.
4. Click the **User Rights Assignment** folder.
5. Double-click **Log on as Service**.
6. In the Local Security Policy Setting dialog box, click **Add**.
7. In the Select Users or Groups dialog box, select the user and click **Add**.
8. Click **OK**, and then **OK** again.
9. Double-click **Log on as Batch Job** and repeat steps 6-8.
10. Reboot your computer after the user rights are added.

Verifying the Security Library

To verify that AquaLogic Interaction security library is encrypting and decrypting passwords properly:

1. Go to the directory on the computer on which you installed Windows Files CS. The default installation location is: **C:\bea\alui\ptntcws\6.1**.
2. Navigate to the **bin\native** directory, relative to the folder designated in the previous step.
3. Double-click the **ptcryptotest.exe** file. This file contains a test application used to test AquaLogic Interaction encryption and decryption.
4. A console opens and prints the progress of encrypting and decrypting a password. If the test has finished successfully, the console displays **Success!** and asks the user to press ENTER to finish. Verify that **Success!** is displayed on the console, then press ENTER to close the test application.

Installing and Configuring Windows Files CS Components

Importing, Configuring, and Creating Windows Files CS Objects in the Portal

This chapter provides detailed instructions for importing, configuring, and creating Windows Files CS objects in the portal.

After you have run the installation wizard and verified correct installation, the next step is to import, configure, and create Windows Files CS objects in the portal.

Complete the following steps:

- Import the remote server and content Web service. For details, see [“Importing the Remote Server and Content Web Service”](#) on page 4-1.
- Configure Windows Files CS security. For details, see [“Configuring Security”](#) on page 4-2.
- Create a content source. For details, see [“Creating a Content Source”](#) on page 4-3.
- Create a content crawler. For details, see [“Creating a Content Crawler”](#) on page 4-3.
- Create a job. For details, see [“Creating a Job”](#) on page 4-3.

Importing the Remote Server and Content Web Service

Import the Windows Files CS remote server and content Web service objects 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 Windows Files CS host computer or copy files to an accessible directory.
2. Log into your 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\ptntcws\6.1\serverpackages\WindowsFilesCS_WS_RemoteServer.pte`
6. Click **Load Package**.
7. Select **Overwrite Remote Servers**.
8. Click **Finish**.

Stay logged in to the portal for the next procedure.

Configuring Security

To configure security settings for the Windows Files CS:

1. Deploy an authentication source (for example, Active Directory) to manage Windows users. For details, refer to Windows documentation.
2. Create a remote authentication source in the portal to import the Windows 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 Windows 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 Windows users.
 - f. Click **Finish**.

You will configure additional security settings in the Content Crawler Editor as described in [“Creating a Content Crawler” on page 4-3](#).

Stay logged in to the portal for the next procedure.

Creating a Content Source

Create a content source to define the area of Windows from which you want to import content. To create a content source, perform the following steps in the portal:

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

Stay logged in to the portal with the Windows Files 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 Windows Files CS folder of the portal:

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 Windows Files 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 Windows Files CS folder of the portal:

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 Windows Files CS folder is associated with an Automation Service. For assistance, see the online help under **Select Utilities | Automation Service**.

Advanced Configuration

This chapter provides instructions for editing advanced settings in the configuration file.

There are several advanced configuration settings that can be set in the configuration file **Web.config**. The default location is on the Windows Files CS host computer is **C:\bea\alui\ptntcws\6.1\Webapp\ntcws**.

Note: Only the parameters listed below should be changed in the **Web.config** file. Do not change any of the other parameters in the file.

1. Open **Web.config** in a text editor.
2. Windows Files CS keeps a log of errors and other information on the remote server. If a problem occurs with Windows Files CS, you might be directed by customer support to change the logging level from the default level of ERROR to DEBUG. To do so, find the text `<level value="ERROR"/>` and change the value to DEBUG: `<level value="DEBUG"/>`.

Note: The default location of the log files on the remote server is:
C:\bea\alui\ptntcws\6.1\Webapp\settings\logs.

3. If you do not want to use basic authentication information passed in the Basic Authentication headers for Windows Files CS content sources, but would rather specify a particular NT domain user to impersonate, find the text `<identity impersonate="false"/>` and change the value to TRUE: `<identity impersonate="true"/>`.

For more information on content source authentication, refer to the online help.

4. It is possible for crawl jobs that handle a very large number of documents to fail as a result of a session having timed out.

When you run a crawl, there are two sessions that are created: one for crawling folders and one for crawling documents. The folder session remains inactive while the document session is used to crawl all the documents in the folder. If you are crawling a folder with a very large number of documents, the folder session might exceed the default IIS session timeout of 80 minutes. When the portal attempts to hit this session that has timed out, the job fails.

If you encounter this problem, increase the IIS session timeout in **Web.config** and on the ntcws virtual directory in IIS. To increase the timeout value in **Web.config**, find the following text and increase the timeout value in the last line:

```
<sessionState cookieless="false"
mode="InProc"
sqlConnectionString="data source=127.0.0.1;user id=sa;password="
stateConnectionString="tcpip=127.0.0.1:42424"
timeout="80"/>
```

Note: To avoid having a large timeout setting, we recommend that you modify your directory structure such that there are not folders that have a large number of documents in them.

5. Save the file and restart IIS for the changes to take effect.

Upgrading and Uninstalling Windows Files CS

This chapter provides information on how to uninstall and upgrade Windows Files CS. It includes the following sections:

- [“Uninstalling Windows Files CS” on page 6-1](#)
- [“Upgrading Windows Files CS” on page 6-2](#)

Uninstalling Windows Files CS

To remove Windows Files CS from your remote server, use the Windows Add/Remove Programs utility. The uninstaller removes the application files that were installed.

After restarting your computer, go through the following checklist to ensure that Windows Files CS was uninstalled correctly:

- If you did not use IIS's default Web site for Windows Files CS, and if there are no other AquaLogic Web services installed on the Web site you created, make sure the Web site was deleted in IIS.
- In IIS, make sure the `ntcws` virtual directory was deleted.
- Make sure the `ptntcws\6.1\Webapp\ntcws` subfolder in your installation directory is empty. You can safely delete this directory.

Upgrading Windows Files CS

To upgrade a previous installation of Windows Files CS:

1. Uninstall the previous version of the software.
2. Complete the pre-installation steps described in [Chapter 2, “Completing Pre-Installation Steps.”](#)
3. Follow the installation procedures described in [Chapter 3, “Installing and Configuring Windows Files CS Components.”](#)
4. Re-enter passwords in your Windows Files CS content sources.

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