BEA AquaLogic SharePoint Console™

Installation Guide for SharePoint Console 1.0

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CHAPTER 1

Welcome

This guide describes how to install the AquaLogic SharePoint Console, and is organized as follows:

1. This chapter provides a brief introduction to the SharePoint Console, typographical conventions used in this book, and information on related BEA documentation and resources.
2. Chapter 2, "Preparing to Install," provides an overview of the install process, and describes hardware and software prerequisites to installation.
3. Chapter 3, "Installing the SharePoint Console," describes the how to use the SharePoint Console installer to install application and image service components.
4. Chapter 4, "Deploying the SharePoint Console," describes how to deploy SharePoint Console objects to your portal.
5. Chapter 5, "Uninstalling SharePoint Console," describes how to uninstall the SharePoint Console.

Introduction to the SharePoint Console

This section provides a brief introduction to the AquaLogic SharePoint Console. For more information on the SharePoint Console and how it is administered, see *Administrator Guide for SharePoint Console 1.0*.

The SharePoint Console provides services for indexing, searching, and accessing items from Windows SharePoint Service (WSS) sites. These services can be broken into two logical groups:

SharePoint Console Content Sources, and the methods of searching and accessing WSS items from within the portal.

SharePoint Console Content Sources

A SharePoint Console Content Source provides one or more content crawlers with authentication and access to one or more WSS sites. In addition, the SharePoint Console Content Source provides default click-through information for crawled WSS items.

While a content crawler needs to be created for each WSS site that is crawled, only one content source is required per set of authentication credentials. If the same authentication credentials are used for multiple WSS sites, and the desired click-through behavior is the same, one content source can serve multiple content crawlers.

SharePoint Console Content Sources and their associated content crawlers index the items in WSS sites across your organization, allowing those items to be searched and accessed by portal users.

Searching and Accessing WSS Items

WSS items indexed by SharePoint Console content crawlers are represented in the knowledge directory as standard portal folders and documents, and can be viewed and accessed like any other document imported into the portal.

In addition, two portlets are provided in the SharePoint Console community. The first portlet, SharePoint Search, allows the user to search for WSS items. The results of the search are returned in the portlet body, and include the WSS site name where the item is located. The second portlet, Most Recently Used SharePoint Items, provides links to the most recently accessed WSS items.

Typographical Conventions

This book uses the following typographical conventions.

Convention	Typeface	Example
• File names • Folder names • Screen elements	**bold**	• Upload **Procedures.doc** to the portal. • Open the **General** folder. • To save your changes, click **Apply Changes**.
Text you enter	`computer`	Type `Marketing` as the name of your community.
Variables you enter	*`italic computer`*	Enter the base URL for the Portlet Server. For example, `http://my_computer/`.
• New terms • Emphasis • Portal object example names	*italic*	• *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.

BEA Documentation and Resources

This section describes the documentation and resources provided by BEA.

Resource	Description
Administrator Guide	It is available in electronic form (PDF) in the release package and the AquaLogic User Interaction Product Center.
Release Notes	These files are written for SharePoint Console administrators. They include information about new features and known issues in the release. They are available in electronic form (HTML) in the AquaLogic User Interaction Product Center.
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 **Help** in the upper-right corner of the banner or dialog box.

Resource	Description
AquaLogic User Interaction Support Center	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: **Technical Support Center** Submit and track support incidents and feature requests, search the knowledge base, access documentation, and download service packs and hotfixes. **Deployment Center** Find the tools you need to roll out, drive, and maintain a successful deployment. Collaborate with peers on strategic business and technical objectives, learn application best practices, download portal launch examples, and calculate your return on investment (ROI). **Product Center** Download products, read Release Notes, access recent product documentation, and view interoperability information. **Developer Center** Download developer tools and documentation, get help with your development project, and interact with other developers via discussion forums. **Education Center** Find information about available training courses, purchase training credits, and register for upcoming classes. If you do not see the Support Center when you log in to http://portal.plumtree.com, contact support@plumtree.com for the appropriate access privileges.

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: support@plumtree.com Phone Numbers: U.S. and Canada+1 415.263.1696 or +1 866.262.PLUM (7586) Asia Pacific+61 2.9931.7822 Europe and U.K.+44 (0)1628 589124 France+33 1.46.91.86.79 Singapore+65 6832.7747

CHAPTER 2

Preparing to Install

This chapter provides an overview of the installation process, including prerequisites to installation. Careful adherence to these steps will help ensure a successful installation.

To install SharePoint Console:

1. Read the product release notes. Release notes include information about new features and known issues in the release, and can be found on the AquaLogic Interaction Product Center.
2. Provision hardware for your deployment and install prerequisite software. For details, see "Hardware and Software Requirements" on page 2-2.
3. Install the SharePoint Console software. For details, see Chapter 3, "Installing the SharePoint Console."
4. Register the SharePoint Console in the Portal. For details, see Chapter 4, "Deploying the SharePoint Console."

Hardware and Software Requirements

The following table summarizes the hardware, operating system, and software requirements for the SharePoint Console For the latest supported configurations, consult the Interoperability Matrix on the AquaLogic User Interaction Support Center.

Component	Requirement
SharePoint Console Host Computer	Minimum Hardware • 1.6 GHz with 2MB L2 cache • 512 MB RAM memory • 128 MB disk space Operating System • Windows 2003 SP1 Application Server • .NET 1.1 SP1
Windows SharePoint Services	• Windows SharePoint Services 2.0
Portal	• Plumtree Portal 5.0.4 • Plumtree Foundation 6.0

CHAPTER 3

Installing the SharePoint Console

This chapter describes how to install the SharePoint Console service components using the SharePoint Console installer. For instructions on deploying the SharePoint Console portal objects to your portal, see Chapter 4, "Deploying the SharePoint Console."

To install the SharePoint Console service:

1. Ensure that you have met all prerequisites. For details, see Chapter 2, "Preparing to Install."
2. Install the SharePoint Console service components on the intended host. For details, see "Installing SharePoint Console Service Components" on page 3-1.
3. Install the SharePoint Console Image Service files to all image services in your portal system. On non-Windows hosts, these files will need to be manually deployed. For details, see "Installing SharePoint Console Image Service Files" on page 3-3.
4. Verify the installation. For details, see "Verifying the Installation" on page 3-5.

Installing SharePoint Console Service Components

The SharePoint Console service components should be installed on the host provisioned for the SharePoint Console.

Launch the SharePoint Console Installer

To launch the SharePoint Console installer:

1. Log into the Windows host as the local Administrator.

2. Copy the **SharePoint_Console_v1-0.exe** installer to a temporary location.
3. Close all unnecessary windows and applications.
4. Double-click **SharePoint_Console_v1-0.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

To install the SharePoint Console service components:

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. Click **Next**.
Choose Components	Choose to install **SharePoint Console v1.0**. Click **Next**.
Choose Install Folder	Choose the location of the installed SharePoint Console components. Accepting the default location is recommended. Click **Next**.
Image Service Host	Enter the host of your Image Service. If your Image Service is on the same host, you can accept the default. Click **Next**.
Fully Qualified Domain Name	Enter the fully qualified domain name of the host you are installing on. For 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. Click **Next**. **Caution:** Do not install the 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 the 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**.
Pre-Installation Summary	Review the installation configuration information for accuracy. When satisfied with the installation settings, click **Install**.

Note: You must restart your system before you can use the SharePoint Console.

Installing SharePoint Console Image Service Files

The SharePoint Console image service files need to be installed to all image service hosts for your portal system. From a Windows portal image service host, launch the installer as described in "Launch the SharePoint Console Installer" on page 3-1. Then, complete the installer wizard pages to install the image service files. For a non-Windows portal image service host, manually deploy the image service files to the image service. For details, see "Manually Deploying the Image Service Files" on page 3-4.

Completing the 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. Click **Next**.
Choose Components	Choose to install **Image Service Files for Windows Image Service**. Click **Next**.
Path to Image Service Files	Enter the location of the portal Image Service files. Click **Next**.
Pre-Installation Summary	Review the installation configuration information for accuracy. When satisfied with the installation settings, click **Install**.

When the installer completes, click **Done**.

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 service components.

To manually deploy the image service files:

1. Copy the appropriate compressed package to the non-Windows portal image service host. The packages are located in the directory **$PT_HOME\ptsharepointcsw\1.0\packages** on the host where you installed the SharePoint Console service components. The two packages contain the same files, compressed in different fashions:
   - **imageserver_windows.zip**
   - **imageserver_unix.tar.gz**
2. Extract the compressed package to your image service folder. The default directory for the image service is **$PT_HOME/ptimages/imageserver**.

Verifying the Installation

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

1. From Windows Control Panel, open the **Internet Information Services** control panel.
2. In the IIS Default Web site, these two virtual directories should be present: **SharePointCWS** and **CustomSearch**.

Note: If you specified a custom IIS Web site location when installing the SharePoint Console service components, the virtual directories should be in the Web site you specified.

Now that the SharePoint Console components are installed, deploy the portal objects to your portal. For details, see Chapter 4, "Deploying the SharePoint Console."

CHAPTER 4

Deploying the SharePoint Console

This chapter describes how to deploy the SharePoint Console portal objects to your portal. Prior to deploying the SharePoint Console portal objects, install and verify the SharePoint Console service components. For details, see Chapter 3, "Installing the SharePoint Console." To deploy the portal objects:

- On Foundation 6.0 or greater, see "Deploying the SharePoint Console to Foundation 6.0" on page 4-1.
- On Corporate Portal 5.0.x, see "Deploying the SharePoint Console to Corporate Portal 5.0.x" on page 4-2.

Deploying the SharePoint Console to Foundation 6.0

On Foundation 6.0, the SharePoint Console portal objects are created when you import **SharePoint_Console.pte** using the Migration - Import utility. The default location of **SharePoint_Console.pte** is:

<PT_HOME>\ptsharepointcws\1.0\packages\6.0\SharePoint_Console.pte

To import **SharePoint_Console.pte**:

1. Log into your Administrator Portal and click **Administration**.
2. From the **Select Utility** drop-down choose **Migration - Import**.
3. Browse to select the **SharePoint_Console.pte** migration package.
4. Click **Load Package**.

5. Check the box next to **Overwrite Remote Servers**.
6. Click **Finish**. A confirmation window will appear. Click **OK**.

When the migration is complete, click **Administration** to reload the Administration page. A new folder, SharePoint Console, should now be available.

Now that the SharePoint Console portal objects are deployed, crawl your WSS Team Sites by creating and running one or more content crawlers:

1. Configure the SharePoint Content Source with user credentials for the WSS siteyou want to crawl.
2. Create a content crawler object from the SharePoint Content Source.
3. Configure the content crawler to crawl a WSS Team Site.
4. Create and run a job that executes the content crawler operation.

For more details on these steps, consult the administrator online help or the *Administrator Guide for SharePoint Console 1.0*.

Deploying the SharePoint Console to Corporate Portal 5.0.x

On Portal 5.0.x, the SharePoint Console portal objects are created when you import **SharePoint_Console.pte** using the Migration Wizard application. The default location of **SharePoint_Console.pte** is:

<PT_HOME>\ptsharepointcws\1.0\packages\5.0\SharePoint_Console.pte

To import **SharePoint_Console.pte**:

1. Copy the **SharePoint_Console.pte** to the Portal host computer.
2. On the Portal host computer, launch the Migration Wizard by clicking **Start | Programs | Plumtree | Migration Wizard**.
3. Log into the Migration Wizard using a portal administrator user name and password. Click **Next**.
4. Choose **Import** and click **Next**.
5. Browse to select the **SharePoint_Console.pte** migration package. Click **Next**.
6. The View Objects in Package panel displays the objects to be imported. Review this list and click **Next**.

7. On the final install panel, click **Migrate**. When migration is complete, the wizard displays a confirmation message.

The SharePoint Console objects are installed under the **Admin Objects Directory : SharePoint Console** in the portal.

Now that the SharePoint Console portal objects are deployed, crawl your WSS Team Sites by creating and running one or more content crawlers:

1. Configure the SharePoint Content Source (a Data Source) with user credentials for the WSS site you want to crawl.
2. Create a Crawler object from the SharePoint Content Source.
3. Configure the Crawler to crawl a WSS Team Site.
4. Create and run a job that executes the Crawler operation.

For more details on these steps, consult the administrator online help or the *Administrator Guide for SharePoint Console 1.0*.

Uninstalling SharePoint Console

To remove the SharePoint Console service components from the hosting computer, use the Windows Add/Remove Progams utility. After the SharePoint Console uninstaller has run, reboot the server.

The installation directory and two virtual directories can now be safely removed. If the default locations were accepted during installation, the installation directory is located:

<PT_HOME>\ptsharepointcws

and the two virtual directories in the IIS Default Web Site:

SharePointCWS
CustomSearch

can now be removed. If custom locations were entered during installation, these directories will be elsewhere.