BEA AquaLogic® Interaction

Installation Guide for Unix and Linux

Version 6.5 MP1
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Contents

4. Uninstalling AquaLogic Interaction 6.5 MP1

CHAPTER 1

About This Guide

This documentation describes how to install and deploy AquaLogic Interaction 6.5 MP1. It is designed to be a quick reference for users with installation experience, while also providing detailed instructions for users installing for the first time.

This guide is organized as follows:

- This section provides information on the intended audience of this documentation, typographical conventions used in this guide, and a list of other BEA documentation and resources related to this product.
- *Installation Prerequisites* on page 11 describes software requirements and other prerequisites to installation.
- *Installation* on page 19 describes how to install and configure AquaLogic Interaction components.
- *Uninstalling AquaLogic Interaction 6.5 MP1* on page 45 describes how to uninstall AquaLogic Interaction.

Audience

This documentation is written for the user responsible for installing or upgrading this product. 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

Typographical Conventions

This document uses the following typographical conventions:

Convention	Typeface	Examples/Notes
• File names • Folder names • Screen elements	**bold**	• 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	*`italic computer`*	Enter the base URL for the Remote Server. For example, `http://`*`my_computer`*`.`
• New terms • Emphasis • Object example names	*italic*	• *Portlets* are web tools embedded in your portal. • The URL *must* be a unique number. • The example Knowledge Directory displayed in Figure 5 shows the *Human Resources* folder.

BEA Documentation and Resources

The following documentation and resources are available from BEA.

Table 1: Documentation

Resource	Description
Installation Guide for AquaLogic Interaction 6.5 MP1 on Windows	This guide describes the prerequisites (such as required software) and procedures for installing AquaLogic Interaction 6.5 MP1 on Windows machines. It is available on *edocs.bea.com/en/alui/ali/docs65*.
Installation Guide for AquaLogic Interaction 6.5 MP1 on Unix and Linux	This guide describes the prerequisites (such as required software) and procedures for installing AquaLogic 6.5 MP1 on Unix and Linux machines. It is available on *edocs.bea.com/en/alui/ali/docs65*.
Upgrade Guide for AquaLogic Interaction 6.1 to 6.5 MP1 on Windows	This guide describes the prerequisites (such as required software) and procedures for upgrading AquaLogic Interaction from version 6.1 to version 6.5 MP1 on Windows machines. It is available on *edocs.bea.com/en/alui/ali/docs65*.
Upgrade Guide for AquaLogic Interaction 6.1 to 6.5 MP1 on Unix and Linux	This guide describes the prerequisites (such as required software) and procedures for upgrading AquaLogic Interaction from version 6.1 to version 6.5 MP1 on Windows machines. It is available on *edocs.bea.com/en/alui/ali/docs65*.
Upgrade Guide for AquaLogic Interaction 6.0 to 6.5 MP1 on Windows	This guide describes the prerequisites (such as required software) and procedures for upgrading AquaLogic Interaction from version 6.1 to version 6.5 MP1 on Windows machines. It is available on *edocs.bea.com/en/alui/ali/docs65*.

Resource	Description
Upgrade Guide for AquaLogic Interaction 6.0 to 6.5 MP1 on Unix and Linux	This guide describes the prerequisites (such as required software) and procedures for upgrading AquaLogic Interaction from version 6.1 to version 6.5 MP1 on Windows machines. It is available on *edocs.bea.com/en/alui/ali/docs65*.
Administrator Guide	This guide describes how to perform management and maintenance of AquaLogic Interaction. It is available on *edocs.bea.com/en/alui/ali/docs65*.
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/en/alui/ali/docs65* and on any physical media provided for delivering the application.
Online Help	The online help is written for all levels of AquaLogic Interaction users. It describes the user interface for AquaLogic Interaction and gives detailed instructions for completing tasks in AquaLogic Interaction. 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*.

Table 2: Other Resources

Resource	Description
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.
AquaLogic User Interaction (ALUI) and AquaLogic	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

Resource	Description
Business Process Management (ALBPM) Support Center	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 *one.bea.com/support*, contact *ALUISupport@bea.com* or *ALBPMSupport@bea.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: *ALUISupport@bea.com* or *ALBPMSupport@bea.com* Phone Numbers: USA, Canada +1 866.262.7586 or +1 415.263.1696 EMEA +44 1494 559127 Asia Pacific +61 2.9931.7822 Australia/NZ +61 2.9923.4030 Singapore +1 800.1811.202

Installation Prerequisites

This chapter describes the prerequisites that must be met before you install AquaLogic Interaction.

Software Requirements

This topic describes the software prerequisites for AquaLogic Interaction 6.5 MP1 on Unix and Linux platforms.

The following table summarizes operating system, database, and other software requirements of AquaLogic Interaction. For the most current platform support information, see the Interoperability Matrix in the Product Center at one.bea.com/support.

Component	Requirement
AquaLogic Interaction Host Machine	• AIX 5.3, on POWER3, POWER4, POWER5 • HP-UX 11i v2, on Itanium • Red Hat Enterprise Linux 4 Update 5, on x86 • Solaris 9 and 10, on SPARC • SUSE Enterprise Linux 9, on x86 AIX requires these patches:

Component	Requirement
	• AIX 5.3 Service pack 5300-05-06 • July 2007 IBM C++ Runtime Environment Component for AIX Solaris 9 requires these patches • 111711-15 (32-bit Shared library patch for C++) • 111712-15 (64-bit Shared library patch for C++)
Database Server Host Machine	• Oracle 9i (9.2.0.4 and above) in default or Oracle RAC configuration • Oracle 10g (10.1.0.3 and above) and 10g R2 (10.2.0.1 and above) in default or Oracle RAC configuration • IBM DB2 UDB 9.5 (on Solaris and AIX, only.) **Note:** When deploying AquaLogic Interaction on HP-UX, only Oracle 10g R2 (10.2.0.1 and above) is supported.
Web Application Server	**AIX** • IBM WebSphere 6.1 with IBM JDK **HP-UX** • BEA WebLogic 9.2 MP2 with HP-UX JRE • BEA WebLogic 10.0MP1 with HP-UX JRE **Red Hat Enterprise Linux** • Apache Tomcat 6.0.14 with BEA JRocket • BEA WebLogic 9.2 MP2 with JRocket • BEA WebLogic 10.0MP1 with JRocket

Component	Requirement
	Solaris • Apache Tomcat 6.0.14 with Sun SDK 1.5 • BEA WebLogic 9.2 MP2 with Sun JVM • BEA WebLogic 10.0MP1 with Sun JVM • IBM WebSphere 6.1 IBM JDK **SUSE Enterprise Linux** • Apache Tomcat 6.0.14 with BEA JRocket • BEA WebLogic 9.2 MP2 with JRocket • BEA WebLogic 10.0MP1 with JRocket
Virtualization System	**AIX** • IBM Dynamic Logical Partitioning (LPAR) **HP-UX** • None **Red Hat Enterprise Linux** • VMWare ESX **Solaris** • VMWare ESX • Solaris 10 Containers (Zones) **SUSE Enterprise Linux** • VMWare ESX

Component	Requirement
Browser	• Microsoft Internet Explorer 6.0, 6.0 SP1, 6.0 SP2, 7.0 • Netscape 7.2, 8.0 • Firefox 2.0 • Safari 3.0

User and Group Requirements

This topic describes the user and group requirements for AquaLogic User Interaction products on Unix and Linux platforms.

We recommend that you create a user and group that will own the portal installation. The following table lists recommended values for a user, a group, and AquaLogic User Interaction directories.

Pre-install Setting	Standard Value	Notes
ALI Group Name	ali	Local group with a fixed ID
ALI User	ali	Local group with a fixed ID
PT_HOME	`/opt/bea/alui`	Owned by ALI user and group

The same values for these users, groups, and directories should be used across all machines hosting portal components. Local users and groups with fixed IDs are recommended. Secure deployments should avoid NIS users for machine security. Using the same local user and group for all AquaLogic User Interaction services allows an administrator to lock down host machines and audit activity.

For convenience, `preinstall.sh`, a script to create users, groups and directories, is provided with the distribution. For details on running the pre-install script, see *Running the Unix Pre-Install Script* on page 15

Running the Unix Pre-Install Script

This topic describes how to use the pre-install script to create users and groups for AquaLogic Interaction on Unix and Linux.

The `preinstall.sh`script creates a user, a group and directories with permissions appropriate for a BEA AquaLogic User Interaction installation on Unix. The script is interactive, asking you a series of questions about the values to be configured.

1. Review the `preinstall.sh` script.
2. Log in as root to become **superuser**.
3. Make a temporary directory for the files and allow all users to access these files by typing:

   ```
   # mkdir /tmp/plumtree

   # chmod 777 /tmp/plumtree
   ```

4. Copy the preinstall file by typing:

   ```
   # cd /tmp/plumtree

   # cp /install_dir/scripts/preinstall.sh .
   ```

5. Run the preinstall.sh script by typing:
   ```
   # ./preinstall.sh
   ```
   Be sure to carefully review any output from the script .
6. Change the password of the newly created user by typing:
   ```
   # passwd ali
   ```
7. Enter the login password.
8. Log out as **superuser**.

Oracle Environment Variables

This table describes the Oracle Environment variables that must be set when installing AquaLogic User Interaction products to UNIX or Windows instances of Oracle 9i or 10g.

Environment Variable	Description	Example Values
ORACLE_BASE	Must be set to the **root** directory of your Oracle installation.	• (UNIX) `/opt/oracle` • (Windows) `C:\oracle`
ORACLE_HOME	Must be set to the **home** directory of your Oracle installation.	• (UNIX) `/opt/oracle/ora92` • (Windows) `C:\oracle\ora92`
ORACLE_SID	Must be set to the system ID (SID) of the portal database instance.	• (Oracle 9i) `PLUM` • (Oracle 10g) `PLUM10` **Note:** PLUM or PLUM10 are expected by the SQL scripts. If you set your SID to a value other than these example values, you must edit the SQL scripts to reflect this change.

Preparing WebLogic for AquaLogic Interaction

This topic describes how to configure WebLogic Server for use with the ALI portal application.

WebLogic Basic Authentication must be disabled for the ALI portal application on WebLogic Server. To do this, in the WebLogic `config.xml` for the ALI portal, set `<enforce-valid-basic-auth-credentials>` to `false`.

1. Disable WebLogic Basic Authentication for the ALI portal application.

   To do this, in the WebLogic `config.xml` for the ALI portal, set `<enforce-valid-basic-auth-credentials>` to `false`.

```
<security-configuration>
 ...
 <enforce-valid-basic-auth-credentials>
```

```
    false
  </enforce-valid-basic-auth-credentials>
 </security-configuration>
```

2. On AIX, HP-UX, and Solaris, verify that your WebLogic domain is configured to use a valid 64–bit Java SDK.
3. On AIX, HP-UX, and Solaris, add `-d64` to your domain's *JAVA_OPTIONS*.

   To do this, edit the `setDomainEnv.sh` script for your domain. Find where `JAVA_OPTIONS` is set, near the end of the file, and add the `-d64` flag.

   For example:

   ```
   #JAVA_OPTIONS="${JAVA_OPTIONS}"
   JAVA_OPTIONS="-d64 ${JAVA_OPTIONS}"
   export JAVA_OPTIONS
   ```

4. Increase the JVM's `MaxPermSize`.

   A `MaxPermSize` of `256m` is recommended. If `MaxPermSize` is set too low, you will see `java.lang.OutOfMemoryError: PermGen space` when attempting to start the portal.

   To increase `MaxPermSize`, edit the `setDomainEnv.sh` script for your domain. Find where `MaxPermSize` is being set for your `JAVA_VENDOR`, and set it to `256m`.

   For example:

   ```
   if [ "${JAVA_VENDOR}" = "HP" ] ; then
           #MEM_ARGS="${MEM_ARGS} -XX:MaxPermSize=128m"
           MEM_ARGS="${MEM_ARGS} -XX:MaxPermSize=256m"
           export MEM_ARGS
    fi
   ```

Preparing Tomcat for AquaLogic Interaction

This topic describes configuration of Tomcat required prior to the installation and deployment of ALI.

1. Create the directory *tomcat_home*`/conf/Catalina/localhost`, if necessary.

   On a fresh install of Tomcat 6.0, this directory might not exist. If the directory does not exist, you must create it.

2. On AIX, HP-UX, and Solaris, verify that Tomcat is configured to use a valid 64–bit Java SDK.
3. On AIX, HP-UX, and Solaris, add `-d64` to Tomcat's Java options.

   To do this, edit your Tomcat `catalina.sh` script. Add `-d64` to the `JAVA_OPTS` environment variable.

   For example:

   ```
   JAVA_OPTS="-d64 ${JAVA_OPTS}"
   Export $JAVA_OPTS
   ```

Installation

This chapter describes how to install the AquaLogic Interaction components, script create and configure your database, and verify the installation.

Installing the AquaLogic Interaction Components

This topic describes how to use the AquaLogic Interaction 6.5 MP1 installer to install ALI components on Unix and Linux.

Before running the ALI installer, you must configure an ALI user and group in your host system. For details, see *User and Group Requirements* on page 14

1. Log into the host as the ALI user.
2. Launch the ALI installer.

   The installer file is named `AquaLogicInteraction_v6-5`

   The AquaLogic Interaction installer is a graphical, X-Windows client when run in interactive mode. If you are running the installer on a remote terminal, make sure your `DISPLAY` is set appropriately.
3. Complete the installer wizard pages.

   For details, see *AquaLogic 6.5 MP1 Installer Wizard Pages on Unix and Linux* on page 20
4. Configure environment settings for ALI.

Source the script *install_dir*/pthome.sh in the startup script for your application server. The pthome.sh script sets up the environment for AquaLogic User Interaction components.

5. Deploy the portal application to your Java application server.

   The portal web application archives are located in *install_dir*/ptportal/6.5/webapp/

   - If you are deploying to Tomcat, deploy portal.war.
   - If you are deploying to WebLogic or WebSphere, deploy portal.ear.

AquaLogic 6.5 MP1 Installer Wizard Pages on Unix and Linux

This topic provides a table describing the wizard pages of the ALI 6.5 MP1 installer for Unix and Linux installations.

Wizard Page	Description
Introduction	This installer wizard page provides a brief description of the installer and describes how to run the installer in silent mode.
Installation Folder	Accept the default installation folder or select a different folder in which to install AquaLogic Interaction. Default: /opt/bea
Upgrade Information	Indicates previously installed versions of portal products.
Choose Install Set	Select either **Complete** or **Custom**. If you select **Complete**, a full set of AquaLogic Interaction components is installed. If you select **Custom**, you can select individual portal components to install according to your deployment plan.

Wizard Page	Description
Configuration Manager - Port and Password	Enter the port and password for the Configuration Manager web tool. The Configuration Manager will be used to complete the installation of AquaLogic Interaction.
Stand-alone or Cluster	Select whether you would like to install a **Single Stand-alone Search Node** or add or replace a **Search Cluster Node**. Selecting to install the stand-alone search node installs a single node on the local machine. If you want to support failover, add or replace search cluster nodes.
Search Nodes	Select to add a new search node or replace an existing node. **Note:** Selecting to replace an existing node removes all information about the node that you are replacing from the system.
Adding New Search Node	Enter the name and port number of the new search node. The search node is installed into *install_dir*/ptsearchserver/6.5.
Search Cluster Files	Select the location of the search cluster files. You must have permission to access and write to the location where you want to install these files. Search cluster files are only installed if they do not already exist in the location that you select. Example: *install_dir*/ptsearchserver/6.1/cluster/
Pre-Installation Summary	Review the list of components to be installed. Click **Install**.
Launch Configuration Manager	Launch the Configuration Manager. The Configuration Manager is located at:

Wizard Page	Description
	`https://host:port/` Where *host* is the host you are installing on and *port* is the port you specified. Log in to the Configuration Manager using the Username `administrator` and the password you specified on the Configuration Manager – Port and Password page. The Configuration Manager displays a list of all recently installed components. Clicking the link next to each component leads you through the settings you need to configure to complete the installation. See the documentation in the Configuration Manager for more details. When you have completed all Configuration Manager tasks, return to the installer and click **Done**.

Creating and Configuring a DB2 Database on Unix

This section describes how to create and configure the portal database on DB2.

You must do the following before you create and configure your DB2 database.

- ALI, Collaboration, and Directory must share the same DB2 database.
- Have your DB2 DBA examine and, if necessary, customize the SQL scripts before you use them. Each SQL file contains comments that describe what customization might be necessary.

  Note: The DB2 SQL scripts use a hard-coded schema name, `ALUI`. If the schema name is changed in the scripts, you must use Configuration Manager to update schema name setting for Portal, Automation Service, ALI API Service, and Directory.

1. Copy SQL scripts from the AquaLogic Interaction install directory to your DB2 server.

   The ALI installer creates the scripts in the following directories:

- For scripts pertaining to the main portal application, *install_dir*/ptportal/6.5/sql/db2
- For scripts pertaining to AquaLogic Directory, *install_dir*/ptportal/6.5/sql/db2

2. Use the DB2 command line processor to run the portal SQL scripts against your DB2 database.

   The scripts must be run in this order:

   1. create_alui_schema.sql
   2. grant_alui_user.sql
   3. create_alui_tablespace_unix.sql
   4. create_tables_db2.sql
   5. load_seed_info_db2.sql

   Run create_alui_schema.sql, grant_alui_user.sql, and create_alui_tablespace_unix.sql as an operating system user with DBADMIN privileges. All other scripts may be run by a DBADMIN user or the ALI user.

   Note: Comments in the header of each SQL file contain recommended syntax for the DB2 command line processor.

3. Run the run_stored_procs.sh shell script.
4. Use the DB2 command line processor to run the postinst_db2.sql script.
5. If you have configured DB2 to skip automatic statistics collection, run statistics_build.sql.
6. Use the DB2 command line processor to run the Directory SQL scripts against your DB2 database.

   The scripts must be run in this order:

   1. create_tables.sql
   2. create_functions.sql
   3. map_alidb_65.sql

Creating and Configuring an Oracle Database on Unix

This section describes how to create and configure the AquaLogic Interaction portal database on Oracle and Unix.

1. Verify that the Oracle environment variables are properly set.

   For details, see *Oracle Environment Variables* on page 15 .

2. Copy the SQL scripts from the AquaLogic Interaction installation directory to your Oracle server.

   - For Oracle 9i, the ALI installer creates the SQL scripts in the following directories:
     - *install_dir*/ptportal/6.5/sql/oracle_unix9.2
     - *install_dir*/aluidirectory/1.0/sql/oracle
   - For Oracle 10g, the ALI installer creates the SQL scripts in the following directories:
     - *install_dir*/ptportal/6.5/sql/oracle_unix10
     - *install_dir*/aluidirectory/1.0/sql/oracle

3. Configure the portal database, tablespace, and user.

   - If you are creating a new Oracle 9i database for the ALI schema, see *Creating the Portal Database for Oracle 9i On Unix* on page 24
   - If you are creating a new Oracle 10g database for the ALI schema, see *Creating the Portal Database for Oracle 10g On Unix* on page 26
   - If you are creating the ALI tablespace and schema within an existing Oracle 9i or 10g database, see *Creating the Portal Tablespace for Oracle On Unix* on page 27

4. Create the portal schema and initialize the portal database.

   For details, see *Creating the Portal Schema for Oracle on Unix* on page 28

Creating the Portal Database for Oracle 9i On Unix

This topic describes how to create and configure the portal database, tablespace, and user on Oracle 9i.

Note: These steps create a new, dedicated portal database. If you are creating the portal tablespace within an existing database, see *Creating the Portal Tablespace for Oracle On Unix* on page 27

The following must be done prior to scripting the database:

- Log into the portal database host machine as the owner of the Oracle system files.
- Verify that `ORACLE_BASE`, `ORACLE_HOME`, and `ORACLE_SID`are set appropriately.

  For details, see *Oracle Environment Variables* on page 15
- If this is a re-creation of a database or a retry of a prior failed attempt, delete the old database file.

1. Create and configure the portal database.
   a) Create the `sys` password.

      For example: `$ $ORACLE_HOME/bin/orapwd file=$ORACLE_HOME/database/orapwPLUM password=password`
   b) Create the `PLUM` directory under `$ORACLE_BASE/oradata`
   c) Create a link to `initPLUM.ora` in `$ORACLE_HOME/database`
2. Create the portal database instance.
   a) From `$ORACLE_BASE/admin/$ORACLE_SID/plumtreescripts`, start `sqlplus` using the /nolog parameter.
   b) Run the `crdb1_oracle_unix.sql` script to create and start the new database instance.

      This script should generate no errors. Output from the script is saved in the file `crdb1.lst` in the plumtree scripts directory.

      The database should now be running.
   c) Verify that the correct data files have been created.

      In `$ORACLE_BASE/oradata/$ORACLE_SID` you should see the following:

      - `systPLUM.dbf`
      - `undo1A.dbf`
      - `temp1A.dbf` (single disk installation only.)
3. Create the portal tablespace and user.
   a) Run the `crdb2_oracle_unix.sql` script to create tablespaces, create the portal database user, and perform low level database tuning.

This script can take a significant amount of time to complete. The following errors might be generated:

```
ORA-00942 table or view does not exist
ORA-1432/ORA-1434 public synonym to be dropped does not exist
```

These errors are acceptable. Any other errors are not acceptable. Output from the script is saved in the file `crdb1.lst` in the plumtree scripts directory.

b) Verify that the correct data files have been created.

In `$ORACLE_BASE/oradata/$ORACLE_SID` you should see the following:

- `PLUMtbl1.dbf`
- `PLUMtmp1.dbf`
- `PLUMidx1.dbf` (single disk installation only.)

Creating the Portal Database for Oracle 10g On Unix

This topic describes how to create and configure the portal database, tablespace, and user on Oracle 10g.

Note: These steps create a new, dedicated portal database. If you are creating the portal tablespace within an existing database, see *Creating the Portal Tablespace for Oracle On Unix* on page 27

The following must be done prior to scripting the database:

- Log into the portal database host machine as the owner of the Oracle system files.
- Verify that `ORACLE_BASE`, `ORACLE_HOME`, and `ORACLE_SID`are set appropriately.

  For details, see *Oracle Environment Variables* on page 15
- If this is a re-creation of a database or a retry of a prior failed attempt, delete the old database file.

1. Create and configure the portal database.

a) Create the `sys` password.

For example: `$ $ORACLE_HOME/bin/orapwd file=$ORACLE_HOME/database/orapwPLUM10 password=password`

b) Create the `PLUM10` directory under `$ORACLE_BASE/oradata`

c) Create a link to `initPLUM10.ora` in `$ORACLE_HOME/database`

2. Create the portal database instance.
   a) From `$ORACLE_BASE/admin/$ORACLE_SID/plumtreescripts`, start `sqlplus` using the /nolog parameter.
   b) Run the `crdb1_oracle_unix.sql` script to create and start the new database instance.

      This script should generate no errors. Output from the script is saved in the file `crdb1.lst` in the plumtree scripts directory.

      The database should now be running.
   c) Verify that the correct data files have been created.

      In `$ORACLE_BASE/oradata/$ORACLE_SID` you should see the following:

      - `systPLUM10.dbf`
      - `undo1A.dbf`
      - `temp1A.dbf` (single disk installation only.)

3. Create the portal tablespace and user.
   a) Run the `crdb2_oracle_unix.sql` script to create tablespaces, create the portal database user, and perform low level database tuning.

      This script can take a significant amount of time to complete. The following errors may be generated:

      ```
      ORA-00942 table or view does not exist
      ORA-1432/ORA-1434 public synonym to be dropped does not exist
      ```

      These errors are acceptable. Any other errors are not acceptable. Output from the script is saved in the file `crdb1.lst` in the plumtree scripts directory.
   b) Verify that the correct data files have been created.

      In `$ORACLE_BASE/oradata/$ORACLE_SID` you should see the following:

      - `PLUM10tbl1.dbf`
      - `PLUM10tmp1.dbf`
      - `PLUM10idx1.dbf` (single disk installation only.)

Creating the Portal Tablespace for Oracle On Unix

This topic describes how to create and configure the portal tablespace and user.

Note: These steps create the portal tablespace within an existing database. If you are creating a new, dedicated portal database , see *Creating and Configuring an Oracle Database on Unix* on page 24

The following must be done prior to scripting the database:

- Log into the portal database host machine as the owner of the Oracle system files.
- Verify that `ORACLE_BASE`,`ORACLE_HOME`, and `ORACLE_SID`are set appropriately.

  For details, see *Oracle Environment Variables* on page 15

1. Connect to your database as a user with sysdba rights.
2. Create the portal tablespace and DB user.
   a) From `$ORACLE_BASE/admin/$ORACLE_SID/plumtreescripts`, start `sqlplus` using the /nolog parameter.
   b) Run the `create_ali_tablespace_unix.sql` script to create the portal tablespace.
   c) Run the `create_ali_user_oracle.sql` script to create the portal schema user

Creating the Portal Schema for Oracle on Unix

Prior to creating the portal schema you must configure the database, tablespace, and database user.

For details on Oracle 9i, see *Creating the Portal Database for Oracle 9i On Unix* on page 24

For details on Oracle 10g, see *Creating the Portal Database for Oracle 10g On Unix* on page 26

This section describes how to create the portal schema.

1. Create the ALI tables, indexes, and stored procedures.

   Create the ALI tables, indexes, and stored procedures by running the `init_ali_db_oracle.sql` script. You must run this script as the portal database user that you created.

   Output from the script is saved in the following files in the scripts directory:

   - `create_tables_oracle.lst`
   - `stored_procs_oracle.lst`
   - `load_seed_info.lst`
   - `postinst.lst`

2. (Optional) Create an Oracle SPFILE.

   For the benefits of using an SPFILE, refer to Oracle documentation.

   To create the SPFILE, run the `create_spfile_oracle_unix.sql` script.

3. Create the Directory tables.

   Run the following scripts in order:

   1. `create_tables.sql`
   2. `create_functions.sql`
   3. `map_alidb_65.sql`

Creating and Configuring an Oracle Database on Windows

This section describes how to create and configure the AquaLogic Interaction portal database on Oracle and Windows.

1. Verify that the Oracle environment variables are properly set.

   For details, see *Oracle Environment Variables* on page 15

2. Copy the SQL scripts from the AquaLogic Interaction installation directory to your Oracle server.

   - For Oracle 9i, the ALI installer creates the SQL scripts in the following directories:
     - *install_dir*`\ptportal\6.5\sql\oracle_nt9.2`
     - *install_dir*`\aluidirectory\1.0\sql\oracle`
   - For Oracle 10g, the ALI installer creates the SQL scripts in the following directories:
     - *install_dir*`\ptportal\6.5\sql\oracle_nt10`
     - *install_dir*`\aluidirectory\1.0\sql\oracle`

3. Configure the portal database, tablespace, and user.

   - If you are creating a new Oracle 9i database for the ALI schema, see *Creating the Portal Database for Oracle 9i On Windows* on page 30

- If you are creating a new Oracle 10g database for the ALI schema, see *Creating the Portal Database for Oracle 10g On Windows* on page 31
- If you are creating the ALI tablespace and schema within an existing Oracle 9i or 10g database, see *Creating the Portal Tablespace for Oracle On Windows* on page 33

4. Create the portal schema and initialize the portal database.

   For details, see *Creating the Portal Schema for Oracle on Windows* on page 33

Creating the Portal Database for Oracle 9i On Windows

This topic describes how to create and configure the portal database, tablespace, and user on Oracle 9i.

Note: These steps create a new, dedicated portal database. If you are creating the portal tablespace within an existing database, see *Creating the Portal Tablespace for Oracle On Windows* on page 33

The following must be done prior to scripting the database:

- Log into the portal database host machine.
- Verify that `ORACLE_BASE`,`ORACLE_HOME`, and `ORACLE_SID`are set appropriately.

  For details, see *Oracle Environment Variables* on page 15
- If this is a re-creation of a database or a retry of a prior failed attempt, delete the old database file.

1. Register the portal SID in the registry by running `RegisterSIDPLUM.reg` .

   `RegisterSIDPLUM.reg` is in the directory on the Oracle Database server to which you copied the scripts.

2. Create and configure the portal database.
   a) Create the `PLUM` directory under `%ORACLE_BASE%\oradata`
   b) Copy `initPLUM.ora` to `%ORACLE_HOME%\database`

3. Create the portal database instance.
   a) From `%ORACLE_BASE%\admin\%ORACLE_SID%\plumtreescripts`, start `sqlplus` using the /nolog parameter.
   b) Run the `crdb1_oracle_nt.sql` script to create and start the new database instance.

This script should generate no errors. Output from the script is saved in the file `crdb1.lst` in the plumtree scripts directory.

The database should now be running.

c) Verify that the correct data files have been created.

In `%ORACLE_BASE%\database` you should see the following:

- `systPLUM.dbf`
- `undo1A.dbf`
- `temp1A.dbf` (single disk installation only.)

4. Create the portal tablespace and user.

a) Run the `crdb2_oracle_nt.sql` script to create tablespaces, create the portal database user, and perform low level database tuning.

This script can take a significant amount of time to complete. The process may generate the following errors:

```
ORA-00942 table or view does not exist
ORA-1432/ORA-1434 public synonym to be dropped does not exist
```

These errors are acceptable. Any other errors are not acceptable. Output from the script is saved in the file `crdb1.lst` in the plumtree scripts directory.

b) Verify that the correct data files have been created.

In `%ORACLE_BASE%\database` you should see the following:

- `PLUMtbl1.dbf`
- `PLUMtmp1.dbf`
- `PLUMidx1.dbf` (single disk installation only.)

Creating the Portal Database for Oracle 10g On Windows

This topic describes how to create and configure the portal database, tablespace, and user on Oracle10g.

Note: These steps create a new, dedicated portal database. If you are creating the portal tablespace within an existing database, see *Creating the Portal Tablespace for Oracle On Windows* on page 33

The following must be done prior to scripting the database:

- Log into the portal database host machine.
- Verify that `ORACLE_BASE`,`ORACLE_HOME`, and `ORACLE_SID`are set appropriately.

  For details, see *Oracle Environment Variables* on page 15
- If this is a re-creation of a database or a retry of a prior failed attempt, delete the old database file.

1. Register the portal SID in the registry by running `RegisterSIDPLUM10.reg`.
   `RegisterSIDPLUM10.reg` is in the directory on the Oracle Database server to which you copied the scripts.
2. Create and configure the portal database.
   a) Create the `PLUM` directory under `%ORACLE_BASE%\oradata`
   b) Copy `initPLUM10.ora` to `%ORACLE_HOME%\database`
3. Create the portal database instance.
   a) From `%ORACLE_BASE%\admin\%ORACLE_SID%\plumtreescripts`, start `sqlplus` using the /nolog parameter.
   b) Run the `crdb1_oracle_nt.sql` script to create and start the new database instance.

      This script should generate no errors. Output from the script is saved in the file `crdb1.lst` in the plumtree scripts directory.

      The database should now be running.
   c) Verify that the correct data files have been created.

      In `%ORACLE_BASE%\database` you should see the following:

      - `systPLUM.dbf`
      - `undo1A.dbf`
      - `temp1A.dbf` (single disk installation only.)
4. Create the portal tablespace and user.
   a) Run the `crdb2_oracle_nt.sql` script to create tablespaces, create the portal database user, and perform low level database tuning.

This script can take a significant amount of time to complete. The process may generate the following errors:

```
ORA-00942 table or view does not exist
ORA-1432/ORA-1434 public synonym to be dropped does not exist
```

These errors are acceptable. Any other errors are not acceptable. Output from the script is saved in the file `crdb1.lst` in the plumtree scripts directory.

b) Verify that the correct data files have been created.

In `%ORACLE_BASE%\database` you should see the following:

- `PLUMtbl1.dbf`
- `PLUMtmp1.dbf`
- `PLUMidx1.dbf` (single disk installation only.)

Creating the Portal Tablespace for Oracle On Windows

Note: These steps create the portal tablespace within an existing database. If you are creating a new, dedicated portal database , see *Creating the Portal Schema for Oracle on Windows* on page 33

- Log into the portal database host machine as the owner of the Oracle system files.
- Verify that *ORACLE_BASE*, *ORACLE_HOME* and *ORACLE_SID* are set appropriately. For details, see

1. Connect to your database as a user with sysdba rights.
2. Create the portal tablespace and DB user.
   a) From `%ORACLE_BASE%\admin\$ORACLE_SID\plumtreescripts`, start `sqlplus` using the /nolog parameter.
   b) Run the `create_ali_tablespace_nt.sql` script to create the portal tablespace.
   c) Run the `create_ali_user_oracle.sql` script to create the portal schema user

Creating the Portal Schema for Oracle on Windows

Prior to creating the portal schema you must configure the database, tablespace, and database user.

For details on Oracle 9i, see *Creating the Portal Database for Oracle 9i On Windows* on page 30

For details on Oracle 10g, see *Creating the Portal Database for Oracle 10g On Windows* on page 31

This section describes how to create the portal schema.

1. Create the ALI tables, indexes, and stored procedures.

   Create the ALI tables, indexes, and stored procedures by running the `init_ali_db_oracle.sql` script. This script must be run as the portal database user you created.

   Output from the script is saved in the following files in the scripts directory:

   - `create_tables_oracle.lst`
   - `stored_procs_oracle.lst`
   - `load_seed_info.lst`
   - `postinst.lst`

2. (Optional) Create an Oracle SPFILE.

   For the benefits of using an SPFILE, refer to Oracle documentation.

   To create the SPFILE, run the `create_spfile_oracle_nt.sql` script.

3. Create the Directory tables.

   Run the following scripts in order:

   1. `create_tables.sql`
   2. `create_functions.sql`
   3. `map_alidb_65.sql`

Creating and Configuring a Microsoft SQL Server Database

This topic provides an overview of how to create and configure the AquaLogic Interaction portal database on SQL Server.

1. Create and configure the portal database.

For details, see *Creating and Configuring the Portal Database* on page 35.

2. Script the portal database.

   For details, see *Scripting the Portal Database on SQL Server* on page 35

Creating and Configuring the Portal Database

This topic describes how to create and configure the portal database on Microsoft SQL Server 2005.

1. Configure the SQL Server instance to use **SQL Server and Windows Authentication mode**.
2. Create the portal database.
   a) Set the portal database name to the name you specified when you ran the AquaLogic Interaction installer.
   b) Verify that the initial size of the Portal database is sufficient for your AquaLogic Interaction deployment. .

      For a relatively small installation, configure a database that is at least 100 MB. For a large enterprise with as many as 20,000 users, configure a database that is as large as 1 GB.

   c) Configure the Portal database to use **SQL Server 2000 (80) compatibility level**
3. Create the portal database user.
   a) Create the Portal database user with the user name and password you specified when you ran the AquaLogic Interaction installer.
   b) Configure the Portal database user to use **SQL Server Authentication**.
   c) Set the Portal database user's default database to the Portal database.
   d) Set the Portal database user's default database to the Portal database.
   e) Grant the Portal database user the **sysadmin** server role.

Scripting the Portal Database on SQL Server

This topic describes how to create and populate SQL Server tables necessary for the AquaLogic Interaction portal.

We recommend that you run the scripts as the `sa` user so that the tables are owned by `dbo`.

Note: See Knowledge Base article DA_319052 for a discussion of the benefits of dbo object ownership.

1. Delete previous tables (if they exist) and create the tables required for the new portal components by running the following script: *install_dir*\ptportal\6.5\sql\mssql\create_tables_mssql.sql.
2. Create the portal objects required by the portal by running the following script: *install_dir*\ ptportal\6.5\sql\mssql\load_seed_info_mssql.sql
3. Create the stored procedures required by the portal by running the following script *install_dir*\ptportal\6.5\sql\mssql\stored_procs_mssql.sql
4. Set configuration information required by the porta by running the following script *install_dir*\ptportal\6.5\sql\mssql\postinst_mssql.sql.
5. Run the SQL scripts for AquaLogic Directory.

   The scripts are located in *install_dir*\aluidirectory\1.0\sql\mssql. Run the scripts in the following order:

   1. create_tables.sql
   2. create_functions.sql
   3. map_alidb_65.sql

   Note: The create_functions.sql script creates functions under the DBO schema and assumes that all portal tables are also under DBO. If you portal tables are under a different schema, you must manually edit create_functions.sql and replace the following:

   - DBO.PTAUTHSOURCES must be changed to *your_schema*.PTAUTHSOURCES
   - DBO.LDAP_ORG_UNITS must be changed to *your_schema*.LDAP_ORG_UNITS

Creating and Configuring the Notification Service Database

This topic describes the database configuration options for the Notification service.

By default, the Notification service uses an internal database. If your deployment requires a more robust database, you can configure Notification to use an external database.

To configure an external database:

1. Script your database.

   - For details on scripting an Oracle database, see *Creating an External Notification Database on Oracle* on page 37.

- For details on scripting a Microsoft SQL Server database, see *Creating an External Notification Database on SQL Server* on page 38.

2. Update Notification database configuration information in Configuration Manager.

   The Notification database configuration is located in Configuration Manager under **AquaLogic Notification Service | External Database**. Details of the necessary settings are provided as inline documentation in the Configuration Manager.

Creating an External Notification Database on Oracle

This topic describes how to create and configure a database for the Notification service on all supported versions of Oracle.

- Log into the portal database host machine as the owner of the Oracle system files. Unless otherwise noted, scripts must be run as the system user.
- Verify that `ORACLE_BASE`, `ORACLE_HOME`, and `ORACLE_SID` are set appropriately.

  For details, see *Oracle Environment Variables* on page 15

The script files referred to in the following steps are found in *install_dir*`\alui\cns\1.0\sql\oracle` on Windows installs and *install_dir*`/alui/cns/1.0/sql/oracle` on Unix and Linux installs. In this directory there are two sub-directories:

- If you are scripting an Oracle database on Windows, use the script files in the `windows` directory.
- If you are scripting an Oracle database on Unix or Linux, use the script files in the `unix` directory.

1. Edit references to the `PLUM10` SID in `cns-server-create-table-space.sql`, if necessary.

   The `cns-server-create-table-space.sql` script assumes your SID to be `PLUM10`. If your SID is different, replace all occurances of `PLUM10` in the script file with your SID.

2. Run `cns-server-create-table-space.sql`.
3. Set user and password values in `cns-server-create-user.sql`.

   In the `cns-server-create-user.sql` script replace the tokens *@CNSDB_LOGIN@* and *@CNSDB_PASSWORD_UNENCRYPTED@* with the user name and password, respectively, for the user you are creating.

4. Run `cns-server-create-user.sql`.
5. As the user you just created, run `cns-createTables.sql`.
6. As the user you just created, run `cns-data.sql`.

Creating an External Notification Database on SQL Server

This topic describes how to create and configure a SQL Server database for the Notification service.

The script files referred to in the following steps are found in *install_dir*`\alui\cns\1.0\sql\mssql` on Windows installs and *install_dir*`/alui/cns/1.0/sql/mssql` on Unix and Linux installs.

1. Create a new database for the Notification service.
2. Give a user the `db_owner` role on the new database.

   Create a new database user for the Notification service, or use an existing user.
3. Run `cns-createTables.sql`.
4. Run `cns-data.sql`.

Starting and Verifying the Installation

This topic describes how to start AquaLogic Interaction and verify operation on Unix and Linux.

1. Start the AquaLogic Interaction and Search daemons:

   For details, see *Starting the AquaLogic Interaction and Search Daemons* on page 38
2. Run the diagnostics script and resolve any issues. For details, see *Running the Diagnostics Script* on page 39
3. Start the portal. For details, see *Starting the Portal* on page 40

Starting the AquaLogic Interaction and Search Daemons

This topic describes the process of starting the ALI and Search daemons on Unix and Linux.

You must start the daemons in the following order. Depending on which components you installed, some daemons might not be applicable to your portal installation.

1. Start the Search daemon by executing
   install_dir/alui/ptsearchserver/6.5/bin/searchserverd.sh start
2. Start the Search Cluster Manager daemon by executing
   install_dir/alui/ptsearchserver/6.5/adminui/bin/clusterui.sh start
3. Start the Directory daemon by executing
   install_dir/alui/aluidirectory/1.0/bin/ldapserverd.sh start
4. Start the Automation daemon by executing
   install_dir/alui/ptportal/6.5/bin/automationserverd.sh start
5. Start the Document Repository daemon by executing
   install_dir/alui/ptdr/6.5/bin/drserverd.sh start
6. Start the Notification daemon by executing
   install_dir/alui/cns/6.5/bin/cnsd.sh start
7. Start the Content Upload daemon by executing
   install_dir/alui/ptupload/6.5/bin/contentuploadd.sh start
8. Start the API daemon by executing
   install_dir/alui/ptws/6.5/bin/apiserviced.sh start
9. Start the Remote Portlet daemon by executing
   install_dir/alui/remoteps/1.0/bin/remotepsd.sh start

Running the Diagnostics Script

This topic describes how to use the diagnostics script to determine the health of your ALI installation prior to running the portal for the first time.

Prior to running the diagnositics script, you must completely configure ALI using the Configuration Manager. You must also create and configure the portal database.

Run the diagnostics script before starting your portal for the first time. It tests basic portal startup functionality. If there are issues with your AquaLogic Interaction installation, the diagnostics script generates a list of warnings and recommendations about how to correct the issues.

Run the following, follow the recommendations, and correct any issues before starting your portal for the first time.

- On a Unix platform, run the diagnostics script, *install_dir*/ptportal/6.5/bin/diagnostic.sh
- On a Windows platform, run the diagnostics script, *install_dir*\ptportal\6.5\bin\diagnostic.bat

Starting the Portal

This topic describes how to start the AquaLogic Interaction portal for the first time.

To start the portal:

1. Start the portal by browsing to the `server.pt` application at the external portal URL you provided the AquaLogic Interaction installer.

   For example, `http://myportal.domain.com:80/portal/server.pt`

2. Log in to the portal as Administrator with no password.

Note: You should change the default Administrator password as soon as possible. Make sure that you document the change and inform the appropriate portal administrators.

Importing Migration Packages

This topic provides an overview of how to import the AquaLogic Interaction component migration packages.

Import the following packages. Depending on which components you installed, some packages might not be applicable to your portal installation.

1. Import the Search Cluster Manager portal objects.

   For details, see *Importing the Search Cluster Manager Migration Package* on page 41.

2. Import the Content Upload portal objects.

   For details, see *Importing the Content Upload Migration Package* on page 41.

3. Import the Activity Service portal objects.

   For details, see *Importing the Activity Service Migration Package* on page 42.

4. Import the RSS Reader portal objects.

For details, see *Importing the RSS Reader Migration Package* on page 42.

5. Import the Notification portal objects.

   For details, see *Importing the Notification Migration Package* on page 42.

Importing the Search Cluster Manager Migration Package

This topic describes how to import the Search Cluster Manager migration package.

- Use the **Migration - Import Utility** (click Administration->Select Utility->Migration - Import) to import the `SearchClusterAdminUI.pte` file.

  - On Unix, `SearchClusterAdminUI.pte` is in *`install_dir`*`/ptsearchserver/6.5/serverpackages/`
  - On Windows, `SearchClusterAdminUI.pte` is in *`install_dir`*`\ptsearchserver\6.5\serverpackages\`

  If necessary, adjust any import settings.

  For details on using the **Migration - Import** utility, see the online help or *Administrator Guide for BEA AquaLogic Interaction*.

  Note: You might need to log out and back in to the portal in order to see the **Search Cluster Manager**. It appears in the **Select Utility** menu.

Importing the Content Upload Migration Package

This topic describes how to import the Content Upload migration package.

- Use the **Migration - Import Utility** (click Administration->Select Utility->Migration - Import) to import the `contentupload.pte` file.

  - On Unix, `contentupload.pte` is in *`install_dir`*`/ptupload/6.5/serverpackages/`
  - On Windows, `contentupload.pte` is in *`install_dir`*`\ptupload\6.5\serverpackages\`

  If necessary, adjust any import settings.

  For details on using the **Migration - Import** utility, see the online help or *Administrator Guide for BEA AquaLogic Interaction*.

Importing the Activity Service Migration Package

This topic describes to import the Activity Service migration package.

- Use the **Migration - Import Utility** (click Administration->Select Utility->Migration - Import) to import the `activityservice.pte` file.
  - On Unix, `activityservice.pte` is in *`install_dir`*`/remoteps/1.0/serverpackages/`
  - On Windows, `activityservice.pte` is in *`install_dir`*`\remoteps\1.0\serverpackages\`

  If necessary, adjust any import settings.

  For details on using the **Migration - Import** utility, see the online help or *Administrator Guide for BEA AquaLogic Interaction*.

Importing the RSS Reader Migration Package

This topic describes how to import the RSS Reader migration package.

- Use the **Migration - Import Utility** (click Administration->Select Utility->Migration - Import) to import the `RSSReader.pte` file.
  - On Unix, `RSSReader.pte` is in *`install_dir`*`/remoteps/1.0/serverpackages/`
  - On Windows, `RSSReader.pte` is in *`install_dir`*`\remoteps\1.0\serverpackages\`

  If necessary, adjust any import settings.

  For details on using the **Migration - Import** utility, see the online help or *Administrator Guide for BEA AquaLogic Interaction*.

Importing the Notification Migration Package

This topic describes to import the Notification migration package.

1. Use the **Migration - Import Utility** (click Administration->Select Utility->Migration - Import) to import the `notification.pte` file.

- On Unix, `notification.pte` is in *`install_dir`*`/cns/1.0/serverpackages/`
- On Windows, `notification.pte` is in *`install_dir`*`\cns\1.0\serverpackages\`

If necessary, adjust any import settings.

For details on using the **Migration - Import** utility, see the online help or *Administrator Guide for BEA AquaLogic Interaction*.

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Uninstalling AquaLogic Interaction 6.5 MP1

This topic describes how to uninstall ALI.

1. Start the uninstaller.
   - On Unix, execute `*install_dir*/uninstall/ptportal/6.5/uninstall AquaLogic_Interaction`
   - On Windows, use **Add/Remove Programs** to remove AquaLogic Interaction.
2. On the Uninstall AquaLogic Interaction page, click **Next**.
3. On the Uninstall Options page, choose whether you want to perform a complete uninstall of AquaLogic Interaction or to uninstall specific features. Then click **Next**.
4. On the Uninstall Complete page, review any items that could not be removed.