ORACLE® USER PRODUCTIVITY KIT

INSTALLATION & ADMINISTRATION

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ABOUT THE DOCUMENTATION

Documentation consists of the following manuals and help systems. These manuals are delivered as PDF files that are stored in the **documentation\language code\reference** folder where the Developer is installed.

- **Installation & Administration**: provides instructions for installing the Developer in a single-user or multi-user environment as well as information on how to add and manage users and content in a multi-user installation. An Administration help system also appears in the Developer for authors configured as administrators. This manual also provides instructions for installing and configuring Usage Tracking.

- **Content Development**: provides information on how to create, maintain, and publish content using the Developer. The content of this manual also appears in the Developer help system.

- **Content Deployment**: provides information on how to deploy content to your audience.

- **Content Player**: provides instructions on how to view content using the Player. The content of this manual also appears in the Player help system.

- **Usage Tracking Administration & Reporting**: provides instructions on how to manage users and usage tracking reports.

- **In-Application Support Guide**: provides information on how implement content-sensitive, in-application support for enterprise applications using Player content.

- **Upgrade:** provides information on how to upgrade from a previous version to the current version.

CONTENTS

1. System Overview

The Developer uses client/server architecture to provide content authoring functionality for large, distributed development teams as well as single users. The Developer provides the following capabilities:

- Version control, including history and rollback to previous versions of a document.

- Author identification and authentication.

- Author-controlled document check out and check in, including the ability to check out documents for an extended period of time.

- Support for both online and offline authoring.

- Ability to access the development server through an intranet (WAN) or the Internet.

- Ability to configure one client to access multiple content sources.

The Server

The server manages the content created in the Developer. The server is built to store this information in a reliable and consistent manner as well as service multiple client workstations in an efficient and scalable manner.

The server has two components: the server software and a database that holds the content, called the Library. The server requires that the World Wide Web service be running under Microsoft Internet Information Server (IIS) and a database. The database may also be stored on a separate server.

The Server Software
The server software contains all of the logic for managing and securing the data within the Library. It handles all operations on the data included in the Library. The server software responds to requests from the client desktops including:

- Adding new documents to the Library.

- Locking (checking out) documents to an individual user.

- Writing changes to the Library.

- Adding or modifying authors who have access to the Library.

- Retrieving documents from the Library.

The Content Library
The Content Library is a database that stores all data shared by multiple authors in the development environment. There are two basic types of data: the content and the server data.

The database includes all content that is created such as topics, web pages, packages, modules, sections, keywords, glossaries, and roles. In addition, the Library also stores templates and publishing styles.

The server data stored is used for running the server. This data includes information about the authors who can connect to the Library, the status of a document in the development process, or the ownership of a document.

The Client

The client computer requires an installation of the Developer. The client also contains a client database (also referred to as the document cache) that is used and managed by the client desktop software.

The use of the client database provides the following:

- Enables caching content on the client workstation for faster access.

- Allows authors to create and modify content when not connected to the server.

- Allows authors to continue working when the connection to the server is intermittently lost.

- Allows authors to make content changes locally, or cancel the changes, before committing them to the server.

The Client Database
The client database is stored in the Documents and Settings folder on the local workstation. It has two parts. One part contains copies of all documents that the author views, all newly created documents before they are written to the server through the check in process, and all changes made to a document prior to being written to the server.

The second part of the database is a "catalog" or listing of all of the documents in the server Library. When an author is online and connected to the server, the list refreshes automatically at default intervals.

Deployment Methods for Server/Client

A multi-user development environment uses an application server. There are several deployment methods you can use for this environment.

Single Server

In its simplest configuration, the Developer requires a single server installation and one or more client workstations. The server software and the database reside on the same server. The server and the client workstations are on the same network.

Multiple Servers

The Developer can also be configured such that the server software and database server are on separate servers. This may be necessary in a situation where a database server might be shared among multiple application servers. In this configuration, all communication from the client software is with the Developer server. The server is the only component that establishes communication with the database server.

Server Access through Internet

It is also possible to access the server through the Internet. All communication between the client desktop and the server is through Web Services using HTTP.

Multiple Libraries

The Developer server can also support multiple libraries on the same physical server. The users would have multiple Profiles, one for each Library.

Remote and Virtual Environments

The Developer can operate in remote and virtual environments such as Citrix and VMware. The following are known issues when operating the Developer in these environments:

Citrix:

- When recording a target application running in a Citrix session, then Developer must be running in the same Citrix session.

- Sound output will likely be choppy

- Citrix does not pass the [PrintScreen] key to applications running in seamless windows. The Developer uses the [PrintScreen] as the default key for recording topics. Therefore, the Recorder will not properly recognize the [PrintScreen] key in a Citrix seamless window. The recording key can be changed in the Options dialog box in the Developer

VMware:

- The only known issue is that the Do It! mode default shortcut for advancing frames is Ctrl-Alt. In VMWare, Ctrl-Alt releases the mouse from the VM. This can cause a conflict and release the mouse from the VM rather than advance Do It! mode. This is normally only an issue if your VMTools are not up to date. If they are up to date, then Do It! mode properly advances. Otherwise, you can always change the Do It! mode key in the Preferences dialog box.

2. Developer Installation

The Developer can be installed in either single or multi-user configuration. In a single user configuration, the content author accesses the application and all content on their local workstation. The Developer and the database are both stored on the local workstation. In a multi-user configuration, the server software and the content Library are installed on a central server. A client is installed on each content author's computer to connect to the server.

> **Microsoft Vista Note:** If you are installing the Developer on a computer with Microsoft Vista, you should run setup using an administrator account.

> **Service Pack Note:** After the Developer is installed, you may receive service pack updates. You can install these updates without having to re-install the Developer. See Service Pack Installation in this manual for more information.

Single User Installation

In this installation, the Developer software and the content database are installed on the local workstation.

File System Permissions
The file system permissions must be set correctly in the folder where the Developer is installed. You must have at least the following:

Directory	NTFS Permissions
Folder where the Developer is installed	Read, List, Execute
Data directory folder (C:\Documents and Settings\<username>\Local Settings\Application Data)	Read, List, Modify, Delete
Data directory folder for Microsoft Vista (C:\Users\<username>\AppData\Local	**Note:** In a default Microsoft Windows installation, the user has full control over this directory.

To install the Developer:

1. Launch the **Setup.exe** file located in the root folder in the software installation files. If a Security Warning appears, click **Run**.

2. Choose the language to be used for the Install Wizard and click **OK** to display the Welcome screen.
   Depending on the product you are installing, the License Key screen may appear before the Welcome screen. If it does, browse to the location of the license key file (usually license.xml). Select the file and click **Open**, then click **Next** to display the Welcome screen.

3. Click **Next** to display the Language Selection screen.

4. From the **Language** list, select the language for the Developer. Click **Next** to display the Setup Type screen.

5. From the **Configuration** list, select **Single User** and click **Next** to display the Select Program Folder screen.

> **Note:** Third-party applications are required for installation. If the applications are not present, a dialog box appears notifying you of which applications are needed. You can choose not to continue and abort the installation. If you choose to continue, the applications are installed. If one of them is the .NET framework, the .NET Installer may prompt you to close the UPK Installer. Ignore this warning and do not shut down the UPK Installer.

6. Accept the default program group, choose from the list of existing program groups, or enter your own custom text. Click **Next** to display the Choose Destination Location screen.

7. If desired, click the **Change** button to browse to a different folder than the default. Click **Next** to display the Ready to Install screen.

8. Click **Back** to change any settings, or click **Install**.
   When the installation is complete, you may be prompted to restart your computer.

9. Click **Finish**.

Multi-user Installation

In a multi-user installation, the Developer application files are installed on a server, and a virtual directory is created on a web site. The web site is necessary so that the content authors can connect to the server through the HTTP protocol. This allows content authors to connect to the server from remote locations through a client installation. During installation, you can choose to install the client on the server as well.

A multi-user installation also requires a database server for the content Library. The database server and the web server do not need to be on the same computer. The installation process can create the database and all necessary tables on the specified server, or you can also run scripts to install the database manually.

Before you begin the installation, you should decide whether you will use the scripts to create the database manually or use the installer software to create the database automatically. If you choose to install the database using the scripts, refer to the Install the Database Manually section, following this topic. If you choose to let the installer create the database, refer to the Install the Server section.

> **Note:** If you choose to install the database and the server separately, you must install the database first.

Install the Database Manually

You can install the database manually by running the scripts provided with the software. If you are using an Oracle Database, a script creates the schema, populates it with the appropriate objects, and creates an application user for the schema. If you are using a Microsoft SQL Server, one script creates the database and the database user, and a second script populates the database with the appropriate objects.

You must have the proper administrative credentials for the database server to create and populate the tablespace or database.

> **Note:** A Microsoft SQL Server must be configured with mixed mode authentication.

Additional Information for Oracle Database Users
If the Oracle Database is stored on one server and you will be connecting to it from a remote server, you must have either the full Oracle Database client or the Oracle Instant Client software installed on the remote server. The full Oracle Database client has all the

necessary connection components. If the Instant Client is installed, you must also install the ODBC drivers. The Instant Client and ODBC drivers can be obtained from Oracle's website.

Install the Developer Database Manually on an Oracle Database Server

⌐ᵇ To install the database manually on an Oracle Database server:

1. Start SQL*Plus and login with the system account.

2. At the command prompt, enter the path to the **CreateSchemaObjects.sql** script located in **\db scripts\ORACLE\Developer** in the software installation files, and append the following parameters:

    schema_owner - The schema owner name is limited to 20 characters..

    password - This will be the password used for the schema owner account and the schema_app account (this account is created automatically).

    tablespace - The name of the tablespace.

    tablespace_datafile - The tablespace location plus the name of the tablespace you used in the previous parameter.

    temp_tablespace - The tablespace name plus _temp.

    temp_tablespace_datafile - The tablespace location plus the name of the tablespace you used in the previous parameter.

    Statement with generic parameters:
    @C:\CreateSchemaObjects.sql schema_owner password tablespace tablespace_datafile temp_tablespace temp_tablespace_datafile

    Example with default install parameters:
    @C:\CreateSchemaObjects.sql ODserver password ODSContent C:\app\oradata\orclvmtn\ODSContent.DBF ODSContent_TEMP C:\app\oradata\orclvmtn\ODSContent_TMP.DBF

3. Confirm the parameters and run the script.

Install the Developer Database Manually on a Microsoft SQL Server

⌐ᵇ To install the database manually on a Microsoft SQL Server:

1. Log in to the Microsoft SQL Server with the database administrator account.

2. Open the **CreateDB.sql** file located in **\db scripts\MSSQL\Developer** in the software installation files and edit it as follows.

3. Replace the %db_name% variable with the name of the database.

4. Replace the %db_path% variable with the location of the database.
    Example: C:\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\Data

5. Run the **CreateDB.sql** script to create the database.

6. Open the **CreateDBObjects.sql** file located in **\db scripts\MSSQL\Developer** on the CD and edit as follows.

7. Replace the ODServer text with the database user ID you want to use or create. This database user ID will be used by the Web Service to read from and write to the Developer database.

8. Replace the developer text with the password you want to use.

9. Change the database name from master to the one you just created. If you do not, the permissions will not be set correctly.

10. Run the **CreateDBObjects.sql** script to populate the database.

Install the Server

Before you install the Developer server, you will need the following information.

Setup Requirements for the Server

The server setup requires the IIS Admin and WorldWide Web Publishing services to be running. If they are not running, the setup program will attempt to start them; if they cannot be started, the installation will be aborted.

Authentication Methods

The Developer can authenticate users in one of two different security modes:

- Microsoft Windows: All login authentication to the Developer is done through Microsoft Windows. The system checks the Microsoft Windows account under which the user has logged in to the local computer.

- Standard: All login authentication to the Developer is done through accounts stored in the Developer database.

Note: Changing security authentication methods after installation will result in technical issues.

Profile Credentials

During server installation, you will be prompted to enter credentials for an administrator account credentials for the Developer Library. If you are installing with the Standard authentication method, you must enter a user name and password and confirm the password. If you are installing with the Microsoft Windows authentication method, you can choose to use the Microsoft Windows account of the person installing the server or enter the information for a different Microsoft Windows login account.

File System Permissions for the Web Server

The file system permissions must be set correctly in the folder where the Developer is installed. The permissions differ for Microsoft Windows and Standard authentication.

- Microsoft Windows Authentication

Directory	User	NTFS Permissions
Folder where the Developer application files are installed	Network Service	Read, List, Execute
Web Service directory (repository.ws)	user accounts	Read, List, Execute

- Standard Authentication

Directory	User	NTFS Permissions
Folder where the Developer application files are installed	Network Service	Read, List, Execute
Web Service directory (repository.ws)	Network Service IUSR_<machinename> (Internet guest account)	Read, List, Execute

Database Access
If you choose to install the database at the same time as you install the application files on the server, you will be prompted for two sets of credentials for the database. The first set is for an account that the installer can use to create the database. You must use an existing account for this set of credentials, and the account must have permissions to create databases and logins.

Note: A Microsoft SQL database server must be configured with mixed mode authentication.

The second set of credentials is used for the Web Services access for the Developer to read from and write to the database. This can be a pre-existing login, for which you must supply the correct login name and password, or you can specify a new login name and password. The installer grants this account access to the database and adds it to the appropriate roles.

Additional Information for Oracle Database Users
If the Oracle Database is stored on one server and you will be connecting to it from a remote server, you must have either the full Oracle Database client or the Oracle Instant Client software installed on the remote server. The full Oracle Database client has all the necessary connection components. If the Instant Client is installed, you must also install the ODBC drivers. The Instant Client and ODBC drivers can be obtained from Oracle's website.

To install the server with an Oracle database:

1. Launch the **Setup.exe** file located in the root folder in the software installation files. If a Security Warning appears, click **Run**.

2. Choose the language to be used for the Install Wizard and click **OK** to display the Welcome screen.
   Depending on the product you are installing, the License Key screen may appear before the Welcome screen. If it does, browse to the location of the license key file (usually license.xml). Select the file and click **Open**, then click **Next** to display the Welcome screen.

3. Click **Next** to display the Language Selection screen.

4. From the **Language** list, select the language for the Developer interface and Library and click **Next** to display the Setup Type screen.

5. From the **Configuration** list, select **Server** or **Server and Client**.
   Note: Third-party applications are required for installation. If the applications are not present, a dialog box appears notifying you of which applications are needed. You can choose not to continue and abort the installation. If you choose to continue, the applications are installed. If one of them is the .NET framework, the .NET Installer may prompt you to close the UPK Installer. Ignore this warning and do not shut down the UPK Installer.

6. Click **Next**. If you chose to install Server and Client, the Select Program Folder screen appears, and you can indicate the desired program folder or accept the default and click **Next** to display the Choose Destination Location screen. If you chose to install the server only, the Destination Location screen appears.

7. If desired, click the **Change** button to browse to a different folder than the default. Click **Next** to display the Choose Web Site screen.

8. From the **Available websites** list, select the website on which you want to install the Developer. Customize the name of the virtual directory, if desired, and select Windows or Standard authentication mode for the virtual directory. Click **Next** to display the Database System screen.

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9. Select the **Oracle Database** option and click **Next** to display the SQL Script Options screen.

10. If you have already run the scripts to create the database, click the **Yes, the scripts have already been run for this version** option. If you want the installer to create the database, click the **No, the scripts have not been run, let the installer run them** option. Click **Next** to display the Oracle Database Login screen.

11. If the scripts have not been run, enter a valid system account name, password, and host string to connect to the Oracle Database server. This account must have permissions to create the schema and the tablespace. If the scripts have already been run to create the database, enter a user name, password and host string that has access to the user schema created to run the application. In this situation, when you click **Next**, the Profile Credentials screen appears (step 14).

12. Click **Next** to display the Choose Tablespace screen.

13. Specify a tablespace name, user name, and password and confirm the password. The user name is limited to 20 characters. Click **Next** to display the Profile Credentials screen.

14. If you chose to install the server with standard authentication, enter a user name and password for the admin user, and confirm the password. If you chose to install with Microsoft Windows authentication, allow the system to use the current Microsoft Windows account or specify another valid Microsoft Windows user account and password. Click **Next** to display the Ready to Install screen.

15. Click **Back** to change any settings, or click **Install**.
    When the installation is complete, you may be prompted to restart the server.

16. Click **Finish**.

To install the server with a Microsoft SQL server:

1. Launch the **Setup.exe** file located in the root folder in the software installation files. If a Security Warning appears, click **Run**.

2. Choose the language to be used for the Install Wizard and click **OK** to display the Welcome screen.
    Depending on the product you are installing, the License Key screen may appear before the Welcome screen. If it does, browse to the location of the license key file (usually license.xml). Select the file and click **Open**, then click **Next** to display the Welcome screen.

3. Click **Next** to display the Language Selection screen.

4. From the **Language** list, select the language for the Developer interface and Library and click **Next** to display the Setup Type screen.

5. From the **Configuration** list, select **Server** or **Server and Client**.
    Note: Third-party applications are required for installation. If the applications are not present, a dialog box appears notifying you of which applications are needed. You can choose not to continue and abort the installation. If you choose to continue, the applications are installed. If one of them is the .NET framework, the .NET Installer may prompt you to close the UPK Installer. Ignore this warning and do not shut down the UPK Installer.

6. Click **Next**. If you chose to install Server and Client, the Select Program Folder screen appears, and you can indicate the desired program folder or accept the default and click **Next** to display the Destination Location screen. If you chose to install the server only, the Destination Location screen appears.

7. If desired, click the **Change** button to browse to a different folder than the default. Click **Next** to display the Choose Web Site screen.

8. From the **Available websites** list, select the website on which you want to install the Developer. Customize the name of the virtual directory, if desired, and select Windows or Standard authentication mode for the virtual directory. Click **Next** to display the Database System screen.

9. Select the **Microsoft SQL Server** option and click **Next** to display the SQL Script Options screen.

10. If you have already run the scripts to create the database, click the **Yes, the scripts have already been run for this version** option. In this situation, when you click **Next**, the Select Microsoft SQL Server screen appears. Select the database server where you installed the database, click **Next**, and the Choose Database screen appears (step 13). If you want the installer to create the database, click the **No, the scripts have not been run, let the installer run them** option and continue with the next step.

11. Click **Next** to display the Microsoft SQL Server Login screen.

12. From the **Database server** list, select the desired Microsoft SQL server. Select Windows Authentication or SQL Server Authentication to connect to the database. If you select Microsoft SQL Server authentication, enter an existing login name and password that has database administrator access to the server. Click **Next** to display the Choose Database screen.

13. Accept the default name for the database or enter a custom name.
    Note: If you have already run the scripts, you must use the name of the database you created.

14. Specify an existing database user ID and password and confirm the password, if necessary. The installer will grant the login access to the database and give it the appropriate permissions.
    Note: If you ran the scripts to create the database, you must use the login you created.
    or
    Specify a new database user ID and password and confirm the password, if necessary.. The installer will create the login, grant it access to the database, and give it the appropriate permissions.

15. Click **Next** to display the Profile Credentials screen.

16. If you chose to install the server with standard authentication, enter a user name and password for the admin user, and confirm the password. If you chose to install with Microsoft Windows authentication, allow the system to use the current Microsoft Windows account or specify another valid Microsoft Windows user account and password. Click **Next** to display the Ready to Install screen.

17. Click **Back** to change any settings, or click **Install**.
    When the installation is complete, you may be prompted to restart the server.

18. Click **Finish**.

Install the Developer Client

To install the Developer Client, you will need the following information from your administrator.

- The name of the web server and virtual directory where the Library is located.

- Your user credentials: either your Microsoft Windows login account, or a user name and password that your administrator has created.

File Permissions on the Client
The file system permissions must be set correctly in the folder where the Developer is installed. You must have at least the following:

Directory	NTFS Permissions
Folder where the Developer is installed	Read, List, Execute
Data directory folder (C:\Documents and Settings\<username>\Local Settings\Application Data) Data directory folder for Microsoft Vista (C:\Users\<username>\AppData\Local	Read, List, Modify, Delete **Note:** In a default Microsoft Windows installation, the user has full control over this directory.

To install the client:

1. Launch the **Setup.exe** file located in the root folder in the software installation files. If a Security Warning appears, click **Run**.

2. Choose the language to be used for the Install Wizard and click **OK** to display the Welcome screen.
   Depending on the product you are installing, the License Key screen may appear before the Welcome screen. If it does, browse to the location of the license key file (usually license.xml). Select the file and click **Open**, then click **Next** to display the Welcome screen.

3. Click **Next** to display the Language Selection screen.

4. From the **Language** list, select the language for the Developer interface and Library. Click **Next** to display the Setup Type screen.

5. From the **Configuration** list, select **Client**. Click **Next** to display the Select Program Folder screen.
   Note: Third-party applications are required for installation. If the applications are not present, a dialog box appears notifying you of which applications are needed. You can choose not to continue and abort the installation. If you choose to continue, the applications are installed. If one of them is the .NET framework, the .NET Installer may prompt you to close the UPK Installer. Ignore this warning and do not shut down the UPK Installer.

6. Accept the default program group, choose from the list of existing program groups, or enter your own custom text. Click **Next** to display the Choose Destination Location screen.

7. If desired, click the **Change** button to browse to a different folder than the default. Click **Next** to display the Ready to Install screen.

8. Click **Back** to change any settings, or click **Install**.
   When the installation is complete, you may be prompted to restart your computer.

9. Click **Finish**.

Unattended Installation

You can use Push technology to distribute executable files for the setup to user desktops. You record response files which contain the pre-determined default settings, and then you can run the executable silently. If you deploy executable files in this manner, no interaction is necessary on the part of the user. The administrator can control the installation.

You can record response files for any of the setup executables.

Record the Parameter File

To create a parameter file, you use the /r parameter to run the setup executable in record mode. This generates a response file (.iss) that contains the settings you chose while recording. These become the default settings.

The setup.iss file is stored automatically in the Windows folder. You can use the /f1 option to specify a different location in which to create the response file. If the path names contain spaces, you must use quotes. The path names should also be absolute, as relative paths may have unexpected results.

Example: "<location of the setup file>\setup.exe" /r /f1"<location of the response file>\setup.iss"

Sample: "x:\my folder\setup.exe" /r /f1"x:\setup.iss"

When you are creating the response file, you must use a computer with the same operating system as the computers on which the setup will be deployed. For example, if your users have computers with Microsoft Windows XP, you must record the steps on a computer with Microsoft Windows XP.

If you need to specify a license key file while you are recording the steps, be aware that it must be in that same location when the setup is being run on the user machines. This can be a common mapped drive on the network, or it can be pushed with the setup.exe to a specified location on the local computer. For example, while you are recording the response, you browse to c:\mylicensekey to locate the license key. When the setup is run silently, the license key must then be in a folder called c:\mylicensekey on the computer where the setup is being run.

Run the Executable Silently

Once you have recorded a parameter file, you can use the /s parameter to run the setup silently. By default, the installation process will look for the response file (.iss) in the same directory as the setup.exe. You use the /f1 parameter to specify a different location of the .iss file.

The response file (.iss) must be either be pushed out with the setup.exe file or reside in a location that is accessible to all computers and uses the same drive mapping as is stored in the response file.

To run the setup silently, use a command line as shown below. If the path names contain spaces, you must use quotes. The path names should also be absolute, as relative paths may have unexpected results.

Example: "<location of the setup file>\setup.exe" /s /f1"<location of the response file>\setup.iss"

Sample: "x:\my folder\setup.exe" /s /f1"x:\setup.iss"

While the setup file is running, there is no indication in the task bar. To verify that the setup process is still running, open Task Manager and view the Processes tab. Setup.exe should appear in the list.

Uninstall the Developer

If you need to uninstall the Developer, you use the Microsoft Windows Add/Remove Programs utility in Control Panel. There may be several entries for the Developer

(depending on what you have installed), as listed below. Before beginning the uninstall process, you should exit the Developer application.

Entry	What is Removed?
<product name> Server	The software application files on the server.
<product name> Client	The software application files on the client computer.
<product name> Single user	The software application on the client computer.
Standalone Topic Player	The web plug-in files.

Uninstalling the application files does not remove content or files in the local storage location. If you want to delete the content, delete your profile before uninstalling the Developer. Deleting the profile deletes the content permanently.

🖱 To uninstall the Developer:

1. On the Microsoft Windows desktop, click the **Start** menu.
2. Click **Settings**.
3. Click **Control Panel**.
4. Launch **Add/Remove Programs**.
5. Scroll the list as necessary and click the Developer entry you want to uninstall.
6. Click **Change/Remove** and follow the steps to uninstall the item.

Language Support

The Developer provides localization support based on component tier such as the software user interface, installed content, and product documentation.

These tier one components are localized into the following languages: **English**, **French**, **German**, **Spanish**, and **Japanese**.

Component	Description
Software User Interface	Setup
	Developer
	Player
Installed Content	Standard and Microsoft Template Text
	Static text in Document formats such as System Process, Training Guide, and so on.
	System folder and document names in the Library that are included at the time of installation.
Product Documentation	All product documentation is translated.

These tier two components are localized into the following languages: **Chinese** (Traditional and Simplified), **Danish**, **Dutch**, **Italian**, **Norwegian**, **Portuguese**, **Swedish**, **Spanish (Mexican)**, **French (Quebec)**, **Russian**, **Hungarian**, **Finnish**, **Polish**, **Korean,** and **Turkish**.

Component	Description
Software User Interface	Player
Installed Content	Standard and Microsoft Template Text
	Static text in Document formats such as System Process, Training Guide, and so on.
Product Documentation	Player manual & help are translated.

Service Pack Installation

If you receive service pack updates, you can install them without having to re-install the Developer client or server software. After installing a service pack, you should update each Library with the appropriate service pack documents. See Update the Library (Service Packs) in the *Content Development* manual for more information.

⌐⑂ To install a service pack:

1. Exit the Developer.

2. Browse to location where the service pack file (setup.exe) is stored.

3. Launch **setup.exe**.

4. Choose the language to use for the Service Pack Wizard and click **OK**.

5. Click **Next** on the Welcome screen to proceed with the installation. The Welcome screen identifies the name of the service pack. You can click **Cancel** if you decide that you do not want to install the service pack.

6. The Choose Destination Location screen displays the default location where the Developer is currently installed. Confirm that this location is correct or change the location to where the Developer is currently installed. Click **Next**.

7. Click **Install** to start the installation.

8. Click **Finish** to exit the Service Pack wizard.

9. Start the Developer and update your Library with the Service Pack documents. Refer to Update the Library (Service Pack) in the *Content Development* manual for more information.

3. Author & Content Administration (multi-user installation only)

In a multi-user installation, any administrator user can perform the following operations to manage authors and administer various aspects of the content in the Library:

- Add, Edit, and Delete Authors

- Manage Library Permissions

- Define Content State Values

- Override Document Checkout by other Authors

Note: You must work online to perform any author management operations.

The Administration menu appears only for authors who are configured as administrators.

Manage Authors

After the installation of the Server is complete, you should install the Client (Developer) on at least one computer and create a Login Profile that connects to the server.

Tip: During the Server installation, you can also choose to install a Client shortcut on the server that you can use to start the Developer. Then you can access the Administration menu to add additional authors and perform other administrative operations.

When the Server component is installed, the person performing the installation must choose to configure the Library using Windows or Standard authentication. Depending on the authentication method selected, a default author is automatically added into the Library. This allows one author to install the Client (Developer) on a local computer, create a Login Profile that connects to the Library, and add additional authors. The authentication method determines how the default author is created. For example, if Windows authentication was selected during the installation, the Windows login of the person installing the software is automatically added as the default author with administrative privileges. If Standard authentication was selected during the installation, a default author of admin is automatically added with administrative privileges. The password for the admin author is admin. You should use this author name and password to create a Login Profile and log into the Developer for the first time. It is also highly recommended that you immediately change the password for the admin author.

Regardless of whether you are using Standard or Windows authentication (as defined when Server component is installed), you must identify each author that will access the Developer before any author can create a Login Profile and log in to the Library.

If the server is configured for Windows authentication, you will need to know the Windows login (user name) for each person that will access the Developer; however, you will not need to know their password. The user's Windows password is used to authenticate the user login.

If the server is configured for Standard authentication, you will define each author's user name and password and then distribute this information to each author so they can create a Login Profile using the same login credentials. It is highly recommended that each author change their password.

As the administrator you can add, edit, or delete authors, assign an author Administrator privileges, as well as manage Library permissions for an author or groups of authors.

Note about Permissions: Any new author that you add has complete access to all folders in the Library, unless you explicitly configure additional security permissions.

Add Author

Each author must have a unique name defined before they can login into a Library. The Developer uses this name to keep track of document modifications. For example, the Library and Outline Editor display the name of the user that has currently checked out a document.

You can also configure group membership and Library folder permissions for each author.

Note: The author name is also use to populate the list of names that appear for the Owner property in the Developer. This property allows an author to identify current document ownership or responsibility.

After you add authors, you will need to provide them following information so they can create a Login Profile and connect to the Library:

- Library location URL (for example, http://server/virtual directory)

- Login credentials such as author name and password (Standard Authentication only)

Note: You can change the sort (ascending or descending) of items in the list by clicking a column title.

To add an author using Windows Authentication:

1. Log in as an administrator.

2. Make sure you are working online.

3. On the **Administration** menu, choose **Manage Authors**.

4. Click **Add new author**.

5. Enter the exact Windows Login for an author in the Author Name field. You must include a domain/machine name as a prefix to the author name separated by a backslash \. For example, enter My_domain name\My_name.

6. Optionally, you can assign an author to a group and/or configure Library folder permissions using the Groups and Permissions tabs.

To add an author using Standard Authentication:

1. Log in as an administrator.

2. Make sure you are working online.

3. On the **Administration** menu, choose **Manage Authors**.

4. Click **Add new author**.

5. Enter a unique author name for the author. Duplicate author names are not allowed.

6. Enter a password and confirm it.

   Blank passwords are acceptable. Author names are not case-sensitive.

7. Optionally, you can assign an author to a group and/or configure Library folder permissions using the Groups and Permissions tabs.

Assign Author as Administrator

If you want an author to have administrator privileges, you must assign the author to the Administrators group. The Administration menu will appear in the Developer the next time the author logs into the Developer. At least one author must be a member of the Administrators group. This group cannot be deleted.

To assign an author as an Administrator:

1. Log in as an administrator.

2. Make sure you are working online.

3. On the **Administration** menu, choose **Manage Authors**.

4. Click ✚ **Add new author** or click 🖊 **Edit selected author**.

5. Click the **Groups** tab.

6. Mark the **Administrators** checkbox.

7. Click OK.

Edit Author

You can edit any author and change their name and/or password (the password can be changed in Standard Authentication only. Administrators can not change the Windows account password under Windows Authentication.)

You can also edit group membership and Library folder permissions for each author.

For Standard Authentication only, editing the name will update the document history for all documents that the author has checked in to the server (on server synchronization). Also note the following:

If you change or delete another author's name, you (administrator) will receive a warning message about the following consequences that will take place if the operation continues:

- The checkout of any document by the author is overridden and any changes that were made by the author are lost.

- Any new document created by the author that was not checked in will be lost (the author can not check their new documents in with the new or deleted author name).

- If the author is logged in to the Developer at the time the name was changed or deleted, the author will be automatically logged out and left disconnected in the Developer. The author will also need to create a new Login Profile with their new credentials if their name was deleted.

Notes about Windows Authentication

If you are using Windows authentication and an author's Windows log in account changes, the administrator must manually update the author name to match the new Windows log on account.

To edit an author using Windows Authentication:

1. Log in as an administrator.

2. Make sure you are working online.

3. On the **Administration** menu, choose **Manage Authors**.

4. Select the author that you want to edit and click **Edit selected author**.

5. Enter the exact Windows Login for an author in the Author Name field.

6. Optionally, you can assign an author to a group and/or configure Library folder permissions using the Groups and Permissions tabs.

To edit an author using Standard Authentication:

1. Log in as an administrator.

2. Make sure you are working online.

3. On the **Administration** menu, choose **Manage Authors**.

4. Select the author that you want to edit and click **Edit selected author**.

5. Edit the author name.

6. Edit the password and confirm it.

7. Optionally, you can assign an author to a group and/or configure Library folder permissions using the Groups and Permissions tabs.

Delete Author

You can remove any author that appears in the list. Deleting an author will prevent the author from logging into the Library; however, this does not prevent the author from starting the Developer.

If you change or delete another author's name, you (administrator) will receive a warning message about the following consequences that will take place if the operation continues:

- The checkout of any document by the author is overridden and any changes that were made by the author are lost.

- Any new document created by the author that was not checked in will be lost (the author can not check their new documents in with the new or deleted author name).

- If the author is logged in to the Developer at the time the name was changed or deleted, the author will be automatically logged out and left disconnected in the Developer. The author will also need to create a new Login Profile with their new credentials if their name was deleted.

If the deleted author had edited documents that display his/her author name in Document History, that name will remain in the history.

Note: You cannot delete the only administrator. Also, an administrator user cannot delete their own author name while they are using Author Management.

To delete an author:

1. Log in as an administrator.

2. Make sure you are working online.

3. On the **Administration** menu, choose **Manage Authors**.

4. Select the author that you want to delete and click ✗ **Delete selected author**.

5. Respond to the message concerning checked out documents to confirm the author deletion.

Change Password

You can change your current password at any time while you are working online. You are prompted for the new password the next time you log in.

Note: If you stored your password in a login Profile, it will be automatically updated when you complete the password change.

🖰 To change your password:

1. Make sure you are working online.

2. On the **Tools** menu, choose **Change Password**.

3. Enter your current password.

4. Type a new password.

5. Type the new password again to confirm the change.

6. Click **OK**.

Manage Library Permissions

Depending on your multi-user authoring environment and needs, it may be important to control who can access content in the Library and how it can be accessed. The Developer allows you to set the following permissions on any folder and its contents:

The following permissions can be set for any folder in the Library:

- **List Folder Contents** - Authors cannot save to folders with this permission. An author can view the names of documents in a Library folder but cannot open a document in any editor and perform actions that would change the document content or its location in the Library. An author also cannot make a copy of the document in any way.

- **Read** - An author can open a document in an editor, but cannot perform any actions that would change the document content or its location in the Library. An author can make a copy (including Save as) of the document and store it in a folder location to which they have appropriate permissions.

- **Modify** - An author has complete access to the folder and its documents and can perform any action (create, modify, copy, delete, publish, export, and so on).

When an author works in a folder with documents that have List or Read permissions, they are alerted when they cannot perform an action due to permission restrictions. Each folder and document in the Library (or the Details view of the Outline Editor) displays the active permission setting in the Permission column which can appear in any view.

Authors should understand the following publishing consideration for documents that have a mix of List and Read permissions. If you open a module or section (in the Outline Editor)

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with Read or Modify access that contains links to other documents with List access, the documents with List access do not appear in published output.

An author **cannot** publish content with List Folder Contents permission to the System/Publishing/Styles folder. You should make sure that all authors have at least Read permission to the appropriate Publishing Project documents in this folder.

Also note that an author can not assign roles to documents with List Folder Contents permission to the System/Roles folder. In general, all authors should have at least Read permission to the System folder or any subfolder within it. If an author has List Folder Contents permission to the System folders, functions such as publishing/preview, role and template assignment, topic editing and recording, attachment icon assignment, and so on, will **not** work.

> **Note:** You must work online to configure security permissions.

You can assign these permissions to each folder in the Library for any author or group (or a combination of both). A group is a collection of authors that makes permission assignment easy. For example, you configure a folder permission for each author individually or you configure a folder permission for a group of several authors.

> **Note:** If conflicting folder permissions are set for an author that has membership in multiple groups, the least restrictive permission is used.

When you add a new author without setting explicit folder permissions, the author is automatically added to a group called "Everyone". By default, this group is configured with Modify permission to all folders in the Library (from the root folder). Keep this in mind as you begin to configure folder permissions for new authors or groups. For example, you may want to consider changing the permission on the Everyone group first and then set permissions for an author or other group. Or, you can leave the Everyone permission setting as is and further restrict permissions for an author or other group.

> **Note:** You cannot remove an author from the Everyone group. The Everyone group can not be deleted.

Permission inheritance

Inheritance allows administrators to easily assign and manage permissions. Inheritance automatically causes objects (documents or folders) within a container (folder) to inherit all of the permissions of that container. For example, documents within a folder, when created, inherit the permissions of the folder. Similarly, subfolders created within a folder inherit the permission of the parent folder. However, you can always change the permissions of any subfolder and override those inherited from its parent.

Assigned and Effective permissions
Permissions can either be explicitly assigned to an author or in effect due to folder inheritance or group membership. Explicitly assigned author permissions take precedence over group permissions when assigned to the same folder. You can view Assigned and Effective permissions using the Folder Permissions command.

Lost documents
Lost documents (new or edited documents) can result if permissions change when an author is working offline. For example, if an author had Modify permissions to a folder and then went offline while the administrator changed your permissions to List Folder Contents. Any new or edited document will be identified as a lost document when the

author reconnects and begins working online. If this happens, an author can display the Lost documents view and recover the documents by moving them to a folder with valid permissions. The status bar of the Developer displays a message when lost documents are detected.

Assign Folder Permissions to an Author

You can assign folder permissions to an author when you add or edit an author. Explicit author permission assignments of this nature take precedence over any group permissions that were assigned to the same folder.

To assign/remove folder permissions to an author:

1. Log in as an administrator.
2. Make sure you are working online.
3. On the **Administration** menu, choose **Manage Authors**.
4. Click ✚ **Add new author** or click ✐ **Edit selected author**.
5. Click the **Permissions** tab.
6. Click **Add** and select a Library folder (you can also make a new library folder).

   A default permission is automatically applied.
7. Click the **Permission** cell and choose a permission from the list.
8. Repeat these steps to assign as many permissions as you need.
9. Click **OK**.

Remove Folder Permissions from an Author

You can remove any permission assignment that you make by editing an author.

To remove folder permissions assigned to an author:

1. Log in as an administrator.
2. Make sure you are working online.
3. On the **Administration** menu, choose **Manage Authors**.
4. Select an author and click ✐ **Edit selected author**.
5. Click the **Permissions** tab.
6. Select an existing permission and click **Remove**.

   You can select only one permission at a time.
7. Confirm the deletion.
8. Repeat steps 6 and 7 to remove additional permissions, if desired.
9. Click **OK**.

Add or Edit a Group

You can create groups to facilitate making permission assignments for many authors. For example, if you have multiple authors that will require the same access to content, it is easier to create a group with the appropriate permission settings and assign all authors that need that access to that group.

When you add or edit a group, you can do the following:

- Assign authors to a group

- Assign folder permissions to a group

Note: You can change the sort (ascending or descending) of items in the list by clicking a column title.

🖱 To add/edit a group:

1. Log in as an administrator.

2. Make sure you are working online.

3. On the **Administration** menu, choose **Manage Groups**.

4. Click ➕ **Add new group** or click ✏ **Edit selected group**.

5. On the General tab, enter a unique **Group Name**.

6. Enter a **description** for the group. This can be any text that you want to describe the group in more detail. This text will appear in the Description column on the Group Management dialog box.

   You can either click **OK** now to save the group or continue to assign authors and permissions to the group as described next.

7. Click the **Members** tab and select the authors to include in the group.

8. Click the **Permissions** tab.

9. Click **Add** and select a Library folder (you can also make a new library folder).

   A default permission is automatically applied.

10. Click the **Permission** cell and choose a permission from the list.

11. Repeat these steps to assign as many permissions as you need.

12. Click **OK**.

Add Author to a Group

For any new or existing group, you can add or remove authors.

🖱 To add authors to a group:

1. Log in as an administrator.

2. Make sure you are working online.

3. On the **Administration** menu, choose **Manage Groups**.

4. Click ➕ **Add new group** and enter a name and description.
   - or -
   Select an existing group and click ✏ **Edit selected group**.

5. Click the **Members** tab and select the authors to include in the group.

6. Click **OK**.

Assign Folder Permission to a Group

You can assign folder permissions to a group when you add or edit a group.

🖱 To assign/remove folder permissions to an author:

1. Log in as an administrator.

2. Make sure you are working online.

3. On the **Administration** menu, choose **Manage Groups**.

4. Click ➕ **Add new group** and enter a name and description.
   - or **-**
   Select a group and click 🖊 **Edit selected group**.

5. Click the **Permissions** tab.

6. Click **Add** and select a Library folder (you can also make a new library folder).

   A default permission is automatically applied.

7. Click the **Permission** cell and choose a permission from the list.

8. Repeat these steps to assign as many permissions as you need.

9. Click **OK**.

Delete a Group

Deleting a group removes the group, author assignments, and the permissions assigned to the group (and subsequently the authors included in the group) but it does not delete the authors from the database.

Note: You cannot delete the Administrators and Everyone groups.

🖱 To delete a group:

1. Log in as an administrator.

2. Make sure you are working online.

3. On the **Administration** menu, choose **Manage Groups**.

4. Select the group that you want to delete and click ✖ **Delete selected group**.

5. Confirm the group deletion.

6. Click **Close**.

View Folder Permissions

As an administrator, you can view all active permissions for each folder in the Library as well as modify any of the existing permissions or create new permissions.

The following two tabs display the permissions for the selected Library folder. Each tab displays the author or group followed by the permission.

- **Assigned Permissions** displays the permissions that were explicitly assigned to an author or group. You can add new author or group permissions or remove any permission that appears. Your changes on this tab are also reflected when you review group or author permissions using the Manage Authors or Manage Groups commands.

- **Effective Permissions** displays the permissions that are in effect from explicit author assignment and group membership, as well as any permissions inherited from a parent folder. The Derived from Group or Folder displays the source of the

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permission assignment. For example, the source can be from an explicit assignment to an author, the result of group membership, or parent folder inheritance.

Note: You can change the sort (ascending or descending) of items in the list by clicking a column title.

To view folder permissions:

1. Log in as an administrator.

2. Make sure you are working online.

3. Select a folder in the Library.

4. On the Administration menu, choose **Folder Permissions**.

   The Assigned Permissions tab displays the permissions explicitly set for the selected folder. You can use the following icons to assign new permissions or remove existing permissions.

   - add a new author permission. Choose an author and then click the **Permission** cell and choose a permission from the list.

   - add a new group permission. Choose a group and then click the **Permission** cell and choose a permission from the list.

   - removes the selected author or group permission.

   Click the **Effective Permissions** tab to display all permissions that are in effect from explicit author assignments and group membership, as well as any permissions inherited from a parent folder.

   The Author or Group column displays the author or group with permission to the selected folder. The Permission column displays the permission to the folder that is in effect. The Derived from folder or group column identifies the source of the permission. For example, this column can display the name of the group if a permission is derived from group membership, a folder name if the permission is inherited from a parent folder, or assigned if the permission is explicitly assigned to an author.

   After reviewing the Effective Permissions tab, you can return to the Assigned Permissions tab to modify the permissions for the folder you are viewing. You can also adjust permission assignments using the Manage Authors or Manage Groups command. You may also consider changing parent folder permissions if the permission inheritance provides inappropriate results.

5. Click OK to save your changes.

Administer the Content Library

As an author with administrator privileges, you can perform the following tasks that impact the content in the Library:

- Manage State Values

- Override Document Check Out

Manage State Values

State is an editable property for communicating the status of a document. This is particularly helpful when working with other authors in a development team. Authors can

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assign a state to any document using the values that are defined in the master list. The default master list of State values include Not Started, Draft, In Review, and Final (in the language installed on the server). Administrators can customize the list by adding, deleting, or renaming the values as well as sequencing the values as they will appear on the assignment list from the Properties pane.

Note: You must be online to work with State values.

Add a State Value

You can have as many State values as you want in addition to the defaults that are provided. You should consider adding values that identify a particular milestone, event, or state in the process of document development. For example, if you localize your content, you might want various State values that identify that a document is ready for translation, in the process of translation, or back from the translation vendor and ready for final production.

 To add a State value:

1. Log in as an administrator.

2. Make sure you are working online.

3. On the **Administration** menu, choose **Manage State Values**.

4. Click and type a new value.

5. Click **OK** to save the value and return to the master list.

6. Click or to reposition the new value where you want it to appear in the list.

7. Click **OK** to close the Manage State Values dialog box.

Delete a State Value

If you delete a State value that is assigned to any documents, the State property for these documents is automatically set to blank.

Note: Documents that are checked out to authors prior to the deletion of a State value will be processed once they are checked back in to the server.

 To delete a State Value:

1. Log in as an administrator.

2. Make sure you are working online.

3. On the **Administration** menu, choose **Manage State Values**.

4. Select the value that you want to delete and click .

   If the value you selected to delete was assigned to any document you are alerted that the State value is in use and that all documents with this State value will be reset to blank. Confirm that you want to proceed or cancel the operation.

5. Click **OK** to close the Manage State Values dialog box.

Rename a State Value

If you rename a State value that is assigned to documents, the State property for these documents is automatically reset to blank.

Note: Documents that are checked out to authors prior to the rename of a State value will be processed once they are checked back in to the server.

To rename a State value:

1. Log in as an administrator.

2. Make sure you are working online.

3. On the **Administration** menu, choose **Manage State Values**.

4. Click and modify the existing value.

5. Click **OK** to save the value and return to the master list.

6. Click **OK** to close the Manage State Values dialog box.

Sequence State Values

Authors can assign State values to documents using the State property on the Properties pane (Workflow category). To make an assignment, the author will choose a value from a list. The sequence of the values on that list will match the order that you define on the Manage State Values dialog box. You might want to define and sequence Content State Values that mirror the status and milestones of your content development process.

To sequence State values:

1. Log in as an administrator.

2. Make sure you are working online.

3. On the **Administration** menu, choose **Manage State Values**.

4. Select one State value and click or to move the value to the new position in this list.

5. Click **OK** to save the changes.

   You can also click Cancel if you do not want to save your changes.

Override Checked Out Documents

As an administrator, you can force a document that is checked out to any author to check back into the server. This command may be needed if an author has a document checked out, and goes on vacation or is otherwise unavailable to check in the document. With an administrative override, any of the local changes that an author may have made will be lost. The document will return to the last version that exists on the server.

Note: Since this command works directly against the server, it can only be performed online. Additionally, this action cannot be undone.

You can select one more documents on which to override the check out.

🖰 To override a checked out document:

1. Log in as an administrator.

2. Make sure you are working online.

3. From the Library or Outline Editor, select the document(s) that another author has checked out.

   If you use the Outline Editor, switch to the Details view so you can see the Checked out by column and locate that documents that are checked out to the author.

4. On the **Administration** menu, choose **Override Check Out**.

5. Choose **Yes** to discard the changes that another may have made to the checked out documents.

6. Respond to the Related Documents prompt if your selection included related documents.

   The Related Documents dialog box appears when you perform an action on any document that has links to other documents. You can choose to process only the document(s) you selected or to process your selection and all of the related documents.

   Click the View related documents link to display a list of the related documents if you are not sure whether you want to include related documents.

   After you have made your selection, click **OK**.

   You might also receive a message if some documents could not be processed because of other constraints. You can click OK to close the message box or click the View activity log link to view the results of the action.

Purge Deleted Documents

When authors delete version-controlled documents in a multi-user environment, the documents are marked for deletion but are not deleted from the Library. Authors can then restore any document that is marked for deletion from the Deleted Documents view in the Library.

As an administrator, you may want to purge deleted documents from the Library to permanently remove them. Purged documents can not be restored by any author. When you purge a document, all versions and history are permanently removed from the database. Any document that links to the purged document will have broken links (identified by the text "Missing document") that authors will need to manually remove.

To purge one or more documents, you must be working online and have Deleted Documents View of the Library displayed. Then you can either selectively purge documents from the list or purge all documents on the list at once.

Note: You should ensure that no author is attempting to restore a document that you are purging. Errors may occur if any author attempts this at the same that you perform a purge.

🖰 To purge selected documents:

1. Log in as an administrator.

2. Make sure you are working online.

3. From the Library, switch to the Deleted Documents View.

4. Select the document(s) that you want to purge from the Library.

5. On the **Administration** menu, choose **Purge**.

6. Choose **Yes** to purge the selected documents.

To purge all documents:

1. Log in as an administrator.

2. Make sure you are working online.

3. From the Library, switch to the Deleted Documents View.

4. On the **Administration** menu, choose **Purge All** to permanently delete all documents in the view from the Library.

4. Usage Tracking Installation

Usage Tracking allows an organization to capture data as users view topics in the Player. Administrators can then run usage reports on the tracked data. Usage Tracking includes a set of standard sample reports. Administrators can also create custom reports to capture the data they need.

Usage Tracking has almost no impact on the users who are viewing content and taking assessments. Depending on the configuration of the Usage Tracking module, a user might need to log in to the Player.

In a Usage Tracking installation, the application files are installed on a server, and a virtual directory is created on a web site. The web site is necessary so that managers can view data and run reports from a web page, without needing client software.

Usage Tracking also requires a database server for the content Library. The database server and the web server do not need to be on the same computer. The installation process can create the database on the specified server, or you can also run scripts to install the database manually.

Before you begin the installation, you should decide whether you will use the scripts to create the database manually or use the installer software to create the database automatically. If you choose to install the database using the scripts, refer to the Install the Usage Tracking Database Manually section, following this topic. If you choose to let the installer create the database, refer to the Install the Usage Tracking Server section..

> **Note:** If you choose to install the database and the Usage Tracking server separately, you must install the database first.

Install the Usage Tracking Database Manually

You can choose to install the Usage Tracking database manually by running the scripts provided on the CD. This allows you to install the database on a dedicated server, and then install the Usage Tracking server software on another server. If you choose to do this, you must install the database before you configure Usage Tracking.

You must have the proper administrative credentials for the database server to create and populate the tablespace or database.

Additional Information for Oracle Database Users
If the Oracle Database is stored on one server and you will be connecting to it from a remote server, you must have either the full Oracle Database client or the Oracle Instant Client software installed on the remote server. The full Oracle Database client has all the necessary connection components. If the Instant Client is installed, you must also install the ODBC drivers. The Instant Client and ODBC drivers can be obtained from Oracle's website.

Install the Usage Tracking Database Manually on an Oracle Database Server

 To install the Usage Tracking database manually on an Oracle Database server:

1. Start SQL*Plus and login with the system account.

2. At the command prompt, enter the path to the **CreateSchema.sql** script located in **\db scripts\ORACLE\UsageTracking** in the software installation files, and append the following parameters:

   schema_owner - The schema owner name is limited to 20 characters.

   password - This will be the password used for the schema owner account

   tablespace - The name of the tablespace.

   tablespace_datafile - The tablespace location plus the name of the tablespace you used in the previous parameter.

   temp_tablespace - The tablespace name plus _temp.

   temp_tablespace_datafile - The tablespace location plus the name of the tablespace you used in the previous parameter.

   Statement with generic parameters:
   @C:\CreateSchema.sql schema_owner password tablespace tablespace_datafile temp_tablespace temp_tablespace_datafile

   Example with default install parameters:
   @C:\CreateSchema.sql ODServer password ODSTrack
   C:\app\oradata\orclvmtn\ODSTrack.DBF ODSTrack_TEMP
   C:\app\oradata\orclvmtn\ODSTrack_TMP.DBF

3. Confirm the parameters and run the script.

4. Start SQL*Plus and log in using the schema owner account and password you just created using the script.

5. Run the **CreateDBObjects.sql** script to populate the database.

Install the Usage Tracking Database Manually on a Microsoft SQL Server

To install the Usage Tracking database manually on a Microsoft SQL Server:

1. Edit the **CreateDB.sql** file located in **\db scripts\MSSQL\UsageTracking** in the software installation files.

2. Replace the %db_name% variable with the name of the database.

3. Replace the %db_path% variable with the location of the database.
   Example: C:\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\Data

4. Log in to the SQL server with the database administrator account and run the **CreateDB.sql** script to create the database.

5. Edit the **CreateUTDBUser.sql** file located in **\db scripts\MSSQL\UsageTracking** on the CD.

6. Replace the ODServer text with the database user ID you want to use.

7. Replace the developer text with the password you want to use.

8. Change the database name from master to the name of the database you specified in step 2.

9. Run the **CreateUTDBUser.sql** file.

10. Run the **CreateDBObjects.sql** script to populate the database.

Install the Usage Tracking Server

Before installing the Usage Tracking Server, you should know the following information.

Setup Requirements for the Server

The Usage Tracking server is intended for installation on a web server. The server setup requires the IIS Admin and WorldWide Web Publishing services to be running. If they are not running, the setup program will attempt to start them; if they cannot be started, the installation will be aborted.

Destination Folder and Virtual Directory

During installation, you will need to enter a destination folder and a name for your Usage Tracking virtual directory. The destination folder is the physical location in which the Usage Tracking server application files will be installed. You can accept the default or specify another location. The virtual directory name allows you to specify the name of a virtual directory on the web server that points to the physical location of the files. The default virtual directory name is ODSTrack, but you can specify another name if you wish.

Note: If there is more than one web site on the web server, you can specify the web site.

Authentication Methods for the Administration Module

Usage Tracking can be set up to authenticate users in one of two different security modes:

- Microsoft Windows: All login authentication to the Developer is done through Microsoft Windows. The system checks the Microsoft Windows account under which the user has logged in to the local computer.

- Standard: All login authentication to the Developer is done through accounts stored in the Developer database.

Set the Security Mode for the Microsoft SQL Server

If you use a database on a Microsoft SQL server to store the information, two authentication modes are available. The authentication mode should be set to SQL Server and Windows on the server (mixed mode).

Note: If IIS and the Microsoft SQL Server are on two different computers (and SQL Server authentication is used), then you should set up IPSec (IP security protocols) between the two computers, to ensure that the plain text password in the database connection string created during Usage Tracking configuration cannot be sniffed.

To install the Usage Tracking server to use an Oracle database:

1. Launch the **Setup.exe** file located in the root folder in the software installation files. If a Security Warning appears, click **Run**.

2. Choose the language to be used for the Install Wizard and click **OK** to display the Welcome screen.
   Depending on the product you are installing, the License Key screen may appear before the Welcome screen. If it does, browse to the location of the license key file (usually license.xml). Select the file and click **Open**, then click **Next** to display the Welcome screen.

3. Click **Next** to display the Language Selection screen.

4. From the **Language** list, select the language for the Developer interface and Library and click **Next** to display the Setup Type screen.

5. From the **Configuration** list, select **Usage Tracking**.
   Note: Third-party applications are required for installation. If the applications are not present, a dialog box appears notifying you of which applications are needed. You can choose not to continue and abort the installation. If you choose to

continue, the applications are installed. If one of them is the .NET framework, the .NET Installer may prompt you to close the UPK Installer. Ignore this warning and do not shut down the UPK Installer.

6. Click **Next** to display the Choose Destination Location screen. If desired, click the **Change** button to browse to a different folder than the default.

7. Click **Next** to display the Choose Web Site screen.

8. From the **Available websites** list, select the website on which you want to install the Developer. Customize the name of the virtual directory, if desired, and select Windows or Standard authentication mode for the virtual directory. Microsoft Windows authentication is used for the virtual directory. Click **Next** to display the Database System screen.

9. Click the **Oracle Database** option and click **Next** to display the Usage Tracking Options screen.

10. Choose the **Install new** option and click **Next** to display the SQL Script Options screen.

11. If you have already run the scripts to create the database, click the **Yes, the scripts have already been run for this version** option and skip to step 14. If you want the installer to create the database, click the **No, the scripts have not been run, let the installer run them** option. Click **Next** to display the Oracle Database Login screen.

12. Enter a valid system account name, password, and host string to connect to the Oracle Database server. This account must have permissions to create the schema and the tablespace. Click **Next** to display the Choose Tablespace screen.

13. Specify a tablespace name, user name, and password and confirm the password. There is a limit of 20 characters on the user name.

14. Click **Next** to display the Ready to Install screen.

15. Click **Back** to change any settings, or click **Install**.
When the installation is complete, you may be prompted to restart the server.

16. Click **Finish**.

⌐ To install the Usage Tracking server to use a Microsoft SQL database:

1. Launch the **Setup.exe** file located in the root folder in the software installation files. If a Security Warning appears, click **Run**.

2. Choose the language to be used for the Install Wizard and click **OK** to display the Welcome screen.
Depending on the product you are installing, the License Key screen may appear before the Welcome screen. If it does, browse to the location of the license key file (usually license.xml). Select the file and click **Open**, then click **Next** to display the Welcome screen.

3. Click **Next** to display the Language Selection screen.

4. From the **Language** list, select the language for the Developer interface and Library and click **Next** to display the Setup Type screen.

5. From the **Configuration** list, select **Usage Tracking**.
Note: Third-party applications are required for installation. If the applications are not present, a dialog box appears notifying you of which applications are needed. You can choose not to continue and abort the installation. If you choose to continue, the applications are installed. If one of them is the .NET framework, the .NET Installer may prompt you to close the UPK Installer. Ignore this warning and do not shut down the UPK Installer.

6. Click **Next** to display the Choose Destination Location screen. If desired, click the **Change** button to browse to a different folder than the default.

7. Click **Next** to display the Choose Web Site screen.

8. From the **Available websites** list, select the website on which you want to install the Developer. Customize the name of the virtual directory, if desired, and select Windows or Standard authentication mode for the virtual directory. Microsoft Windows authentication is used for the virtual directory. Click **Next** to display the Database System screen.

9. Click the **Microsoft SQL Server** option and click **Next** to display the Usage Tracking Options screen.

10. Choose the **Install new** option and click **Next** to display the SQL Script Options screen.

11. If you have already run the scripts to create the database, click the **Yes, the scripts have already been run for this version** option and skip to step 15. If you want the installer to create the database, click the **No, the scripts have not been run, let the installer run them** option. Click **Next** to display the Microsoft SQL Server Login screen.

12. From the **Database server** list, select the desired SQL server. Select Microsoft Windows Authentication or SQL Server Authentication to connect to the database. If you select SQL Server authentication, enter an existing login name and password that has database administrator access to the server. Click **Next** to display the Choose Database screen.

13. Accept the default name for the database or enter a custom name.

14. Specify an existing database user ID and password and confirm the password. The installer will grant the login access to the database and give it the appropriate permissions.
or
Specify a new database user ID and password and confirm the password. The installer will create the login, grant it access to the database, and give it the appropriate permissions.

15. Click **Next** to display the Ready to Install screen.

16. Click **Back** to change any settings, or click **Install**.
When the installation is complete, you may be prompted to restart the server.

17. Click **Finish**.

5. Usage Tracking Configuration

You must run the configuration utility before launching the Usage Tracking Administration tool. There are two (Microsoft Windows authentication) or three (Forms authentication) steps for configuring the server, which must be performed in this order:

1. Change the configuration password (optional), define the connection to the database, and set the authentication options for the users; save this setup.

2. Build the database.

3. Create an administrative user, if you are using Forms authentication.

You can access the configuration page for the first time by opening your browser and entering a URL that points to the default page within the virtual directory on the web server. For example, if the name of the web server is represented by <server_name> and the name of the virtual directory is ODSTrack, the URL would be http://<server_name>/ODSTrack/. You do not have to enter the default page name.

Warning! When you run the configuration utility for the first time, you create a configuration file in the Usage Tracking server directory. Therefore, you must have administrative rights to the Usage Tracking server folder on the web server to run the configuration utility.

Note: The initial password for the configuration utility is "tracking". It is highly recommended that you change this password.


🖰 To launch the configuration utility:

1. Open your browser.

2. Enter the appropriate URL for the default page.

3. Enter the default password of **tracking** and click **Submit**.

   This displays the Step 1 (Configuration) page of the Usage Tracking configuration utility.

Change the Setup Password

The same default password is used for all Usage Tracking installations. It is therefore highly recommended that you change the setup password for security purposes. This password is for accessing and running the configuration utility only, not for the Usage Tracking Administration tool.

🖰 To change the setup password:

1. Launch the Step 1 (Configuration) page.

2. In the **Password** field, enter a new password.

3. In the **Confirm password** field, enter the password again.

Configure the Database Settings

The settings in the Database Settings section of the Step 1 (Configuration) page enable the Usage Tracking server to establish a connection to the database. The Content directory path indicates the physical path to the directory on the web server where the content to

5-1

be tracked will reside. The Content directory name indicates the relative path between the directory containing the content and the main Usage Tracking virtual directory in IIS.


Note: If you used the Installer to create the database, the default parameters in the connection string will be correct. If you created the database manually using the script, the parameters will default to generic placeholders, and you must edit the Database connection string. The information varies according to the type of database you are using.

For an Oracle database:

Parameter	Description
user id	Oracle login that you created for or assigned to the Usage Tracking database (UTServer if the default login was created)
password	Password for the above Oracle login
data source	Instance name of the Oracle server on which the database resides

For a Microsoft SQL database:

Parameter	Description
user id	Microsoft SQL login that you created for or assigned to the Usage Tracking database (UTServer if the default login was created)
password	Password for the above Microsoft SQL login
initial catalog	Name of the Microsoft SQL database that you created for Usage Tracking
data source	Name of the Microsoft SQL server on which the database resides
integrated security	Type of authentication for the Microsoft SQL database This parameter should be set to FALSE, which means that a Microsoft SQL account will be used for authentication.

To configure the database settings if you installed the database manually:

1. Launch the Step 1 (Configuration) page.

2. Edit the **Content directory path** to point to the directory in which the content is installed.

   The content path is the physical location of the content to be tracked. For example, if the content will be installed in the directory I:\Usage Tracking\ODS\Content, you should type I:\Usage Tracking\ODS\Content in the Content directory path field.

3. Edit the **Content directory name**.

   The directory name is the relative path between the directory containing the content and the main Usage Tracking virtual directory in IIS. This is usually the same name as the physical folder where the content is located, but it might be different. For the default Usage Tracking installation, this field should read "Content".

   If you plan to store your content in an alternative location, see *Configure IIS to Install Content in an Alternative Location*.

4. Edit the **Database connection string** to be a valid connection string. Refer to the tables in the discussion above.

Example for Oracle database:
Data Source=orcl; User Id=UTServer; Password=password;

Example for Microsoft SQL server:
user id=UTServer;password=password;initial catalog=ODSTrack;data source=localhost;Integrated Security=false

5. Click **Test Connection**.

   You should receive the message "Database connection OK. Build database after saving configuration." If the connection fails, edit the database connection string in step 4 and test the connection again.

Set the Authentication Mode

For data to be tracked, the Usage Tracking module must be able to identify the users who are viewing content. This is called authentication. There are two possible methods of authenticating users for the Usage Tracking Administration tool: Microsoft Windows and Forms.

Note: Once you pick the authentication mode, you should configure the appropriate permissions in IIS for the virtual directory. See *Configure the IIS Permissions* for further information.

Microsoft Windows Authentication

With Microsoft Windows authentication, you can identify Microsoft Windows users and/or user groups that have administrative permissions to delete data and/or to run reports. You can select the same groups for both types of administrative permissions or different groups for the different types of administrative permissions. Then, once you have added a user to the appropriate user group, the user will be able to access the Administration tool with the specified permissions.

If you choose to use Microsoft Windows authentication, you can change the following three user settings on the server:

Option	Description
Permissions	Allows you to map Microsoft Windows user groups or users to the appropriate permissions, namely, to delete data and/or to run reports
Language	Allows you to specify the default language to be used for the Administration tool
Locale	Allows you to specify the locale to control the date format, numerical display, and so on, used in Usage Tracking reports

Microsoft Windows authentication also affects the possible options an administrator has for user maintenance. Because Usage Tracking cannot be used to add, edit, or delete Microsoft Windows user accounts, administrative users under Microsoft Windows authentication are able only to remove the data stored in the database, that is, the usage records. This option is available only to the users or user groups listed in the Delete data pane of the Permissions section of the Step 1 (Configuration) page.

Forms Authentication

With Forms authentication, you must create users in the Usage Tracking server database and assign appropriate rights to each user. With Forms authentication, administrators with the appropriate permissions can add, edit, and delete user accounts, as well as remove tracking data.

If you choose to use Forms authentication, you can change several settings on the server that affect both administrators and users as follows:

| Option	Description
Allow users to create their own account	Allows a user, when logging in, to create a new account and specify a user name and password
Allow users to save user name & password to bypass login	Provides a Save user name & password link on the login page, which allows users to store their user name and password so that they do not need to enter this information each time they log in (the login page is bypassed)
User name is email address	Indicates that the user name must be a valid email address
Minimum password length	Allows you to specify a minimum number of characters for a user password. A minimum length of 0 means that blank passwords are allowed.
Language	Allows you to specify the default language to be used for the Administration tool
Locale	Allows you to specify the default locale to control the date format, numerical display, and so on, used in Usage Tracking reports

To set the authentication mode:

1. Launch the Step 1 (Configuration) page.

2. In the **Authentication Mode** group, select the **Windows** option or the **Forms** option.

3. Specify the desired user options and permissions.

Save the Setup

When you have established the database connection, chosen the authentication mode, and specified the user options, you save the setup by clicking the Save Setup button at the bottom of the Step 1 (Configuration) page.

Build the Database and Load Standard Reports

After you have saved the configuration, you must build the database. This step creates the tables used by Usage Tracking in the database. You also have the option of loading the standard reports that come with Usage Tracking.

To build the database and load standard reports:

1. From the Step 1 (Configuration) page, click the **Step 2 (Build database)** link.

2. Click **Build Database**.

3. Click **Load Reports**.

Create an Admin User (Forms Authentication Only)

If you choose to use Forms authentication, you must create at least one administrative user. This user has all of the administrative privileges, which include creating, editing, and deleting users; assigning administrative privileges to other users; and creating and running reports.

⌐ To create an admin user (Forms authentication only):

1. From the Step 1 (Configuration) page or the Step 2 (Build database) page, click the **Step 3 (Create admin user)** link.

2. In the **User name** field, enter a user name.

3. In the **Password** field, enter a password.

4. In the **Confirm password** field, enter the password again.

5. Click **Create Admin User**.

Post-Configuration Tasks

During Usage Tracking installation and configuration, the account must have administrator rights to the database. Once the database is installed and running, however, you should restrict the rights in order to improve the security of the Usage Tracking server by performing the steps in the procedure below.

Note: You should perform this step regardless of whether you create the database manually or automatically during installation of the Usage Tracking server.

⌐ To perform post-configuration tasks in Oracle Database:

1. Start SQL*Plus and login with the system account.

2. At the command prompt, enter the path to the **CreateAppUser.sql** script located in **\db scripts\ORACLE\UsageTracking** in the software installation files, and append the following parameters:

   schema_owner - This is the account you specified in the connection string. A schema user account will be created based on this name, with _app appended.

   password - schema owner password. This is the password you specified in the connection string. This password will also be used for the schema user account that is created.

   Statement with generic parameters:
   @C:\CreateAppUser.sql schema_owner password

   Example with default install parameters:

   @C:\CreateAppUser.sql ODServer password

3. Open the Usage Tracking configuration page. Edit the Database connection string and replace the User ID with the schema user you just created. For example, if the schema owner is UTServer, then the schema user is UTServer_app.

4. Test the connection, save, and exit the configuration page.

⌐ To perform post-configuration tasks in Microsoft SQL Server:

1. Login to the Microsoft SQL Server using the database administrator account and change the database from master to the database you created. If you do not, the security permissions will not be set correctly.

2. Open and edit the **SecureUT.sql** file located in **\db scripts\MSSQL\UsageTracking** in the software installation files.

3. Replace the **ODServer** text with the user ID account you specified in the connection string.

4. Run the **SecureUT.sql** script.

5. Open the Usage Tracking configuration page and test the connection.

6. Save and exit the configuration page.

Modify the Configuration

After establishing the initial Usage Tracking configuration, you might later need to modify it, for example, to change the administrative user name or password. To access the configuration page, open your browser and point to the setup.aspx file in the configuration subfolder within the Usage Tracking virtual directory. For example, if the name of your web server is represented by <server_name> and the virtual directory for the Usage Tracking server is ODSTrack, the URL would be

```
http://<server_name>/ODSTrack/configuration/setup.aspx.
```

Install Content on the Usage Tracking Server

For training data to be tracked by Usage Tracking, you must publish your content for the Player. In addition, the content must be published from the current version of the Developer.

The default folder for Usage Tracking content is the /ODS/Content subfolder of the Usage Tracking installation directory. Therefore, if you use the standard Usage Tracking setup, you should copy your Player content to this folder on the Usage Tracking server. If desired, however, you can use a different location for your content, provided that you specify the appropriate folder in the Content directory path field of the Database Settings section of the configuration utility. See *Configure IIS to Install Content in an Alternative Location* for additional information.

Configure IIS Permissions

After you have chosen the type of authentication on the Configuration page for the Usage Tracking server, you must set the IIS permissions for the virtual directory on the web server to match the selected security mode. You may also need to set the authentication for the admin, configuration, and tracking directories within the virtual directory.

In a default installation of Usage Tracking, the virtual directory of the Usage Tracking web site is ODSTrack. It is used in the following tables as an example. The virtual directory in your installation may be different if you changed the name during the install process.

Authentication mode - Usage Tracking	ODSTrack directory	ODSTrack\ admin directory	ODSTrack\ configuration directory
Forms (Usage Tracking controls the users)	Anonymous	Anonymous	Windows
Microsoft Windows (Microsoft Windows controls the users)	Windows	Windows	Windows

If you want to track content usage but do not want statistics for individual users, use the settings in the following table. With these settings, all usage is tracked and reported under a single Anonymous user account.

Authentication mode - Usage Tracking	ODSTrack directory	ODSTrack\ admin directory	ODSTrack\ configuration directory	ODSTrack\ tracking directory
Windows (Anonymous users)	Anonymous	Windows	Windows	Windows

Configure IIS to Install Content in an Alternative Location

You might wish to install your content in a location other than the default (\ODS\Content subfolder of the Usage Tracking installation directory), for example, for security reasons. To do so, you must first configure the virtual directory in IIS for this alternative location before configuring the Usage Tracking database.

To configure IIS to use an alternative location for the Usage Tracking content:

1. Open the **Internet Information Services** manager.

2. Expand the tree as necessary and select the Default Web Site.

3. If you are using IIS6, create a new virtual directory. For the Virtual Directory Alias, enter any name for the virtual directory. For the Web Site Content Directory, indicate the folder where you want to install the content to be tracked. For Virtual Directory Access Permissions, set them to Read, Run scripts, and Execute. Open the Properties page for the virtual directory you just created. Change the Application pool to **ODUTAppPool**.

   If you are using IIS7, create a new application. In the **Alias** field, enter any name for the virtual directory. Click the **Select** button and for the **Application pool**, select **ODUTAppPool** and click **OK**. In the **Physical Path** field, indicate the folder where you want to install the content to be tracked. Open the Handler Mappings page and click the **Edit Feature Permissions** link. Select the **Read** and **Script** options and click **OK**.

4. Launch the Usage Tracking configuration page.

5. On the Step 1 (Configuration) page edit the **Content directory path** field to point to the new location for the content.

6. Edit the **Content directory name** to the Alias name you specified for the new virtual directory.

   Be sure to include ..\ before the name.

7. Save the setup.

Usage Tracking Security Permissions

In Microsoft Windows Server, upon installation, Usage Tracking creates a virtual directory that uses the ODUTAppPool. This will use the application pool identity set in DefaultAppPool. By default, the security account used is predefined to be the Network Service account. In this default setting, the Network Service account must have the appropriate permissions to the ODSTrack directory. The permissions needed for this account on the directory and subdirectories are Read & Execute, Read, and List Folder Contents. The Network Service account, by default, is a member of the Users group. Therefore, if the Users group is removed from the Security tab for the ODSTrack directory, so is the identity for the application pool, which results in the web server failing to serve Usage Tracking web pages.

To remedy this problem in Usage Tracking configured for Forms authentication, the account configured in the default application pool identity must be given Read & Execute, Read, and List Folder Contents permissions to the ODSTrack directory. Also, the account of the system administrator who will be configuring Usage Tracking must have Read & Execute, Read, List Folder Contents, and Write permissions to the ODSTrack directory. Also, the configuration subdirectory should use Integrated Security and anonymous should be disabled.

To remedy this problem in Usage Tracking configured for Microsoft Windows Authentication, all users who will be accessing Usage Tracking must have read permissions to the ODSTrack directory. Again, the configuration subdirectory should use Integrated Security and anonymous should be disabled.

> **Note:** If you add the necessary security account to a group that has permissions to the ODSTrack directory, then you must restart IIS before that group can access the directory.

NTFS Settings

Specific permissions must be set for the physical directory in which the Usage Tracking server is installed. These settings apply to both the Usage Tracking server root directory and its subdirectories and are as follows:

User or Group	NTFS Permissions
Microsoft Windows Server: NETWORK SERVICE	Read & Execute
User running the configuration setup.aspx page	Modify, Read & Execute, Read, Write

6. Index