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Information Manager Installation Guide

Installing and Configuring InQuira Information Manager

InQuira Version 8.1.2

Document Number M80-IG-00

August 27, 2008

InQuira
851 Traeger Ave.
Suite 125
San Bruno, CA 94066

Contents

Preface   About This Guide

This guide is intended for technical staff who are responsible for installing InQuira Information Manager. It provides detailed information on installing and configuring the Information Manager product components.

This preface includes information on:

- the general organization of this guide

- the support services available from InQuira Customer Support

- the available product documentation

In This Guide

The Information Manager Installation Guide is divided into the following sections:

Chapter 1, Installation Overview	This chapter describes the general installation process, lists hardware and software requirements and dependencies, and provides product packaging and distribution information.
Chapter 2, Installing and Configuring Information Manager	This chapter describes how to use the packaged installation program to install and configure the Information Manager software.
Chapter 3, Configuring a Web Application	This chapter describes how to configure a web application to operate with Information Manager.
Chapter 4, Uninstall Information Manager	This chapter describes how to uninstall Information Manager.

Contacting InQuira

You can contact InQuira by mail, telephone, fax, and email.

Address:	851 Traeger Ave. Suite 125 San Bruno, CA 94066
Telephone:	(650) 246-5000
InQuira Customer Support Hotline:	(888) 947-8324 NOTE: See *InQuira Customer Support* on page 3 for more information on reporting incidents to InQuira Customer Support.
Fax:	(650) 264-5036
Email:	For sales information, send email to sales@inquira.com. For product support, send email to support@inquira.com.
World Wide Web:	Learn more about InQuira products, solutions, services, and support on the world wide web at: www.inquira.com.

InQuira Customer Support

InQuira Customer Support is available from 6:30 am to 4:30 pm PST, excluding InQuira holidays.

For Priority 1 incidents, such as when a production system hangs or crashes, or when continued use of the product is impossible, please use the support hotline: (888) 947-8324.

IMPORTANT: We accept Priority 1 requests only by telephone. We recommend that you send a follow-up email for Priority 1 requests after contacting InQuira Customer Support using the support hotline.

For Priority 2, 3, and 4 incidents, as described below, please contact InQuira Customer Support by email at: support@inquira.com.

Incident response times are determined by the following priority definitions:

Priority	Contact	Response Time	Definition
1	The InQuira Customer Support hotline: (888) 947-8324	1 business hour	A production system hangs or crashes, or continued use of the product is impossible.
2	support@inquira.com	8 business hours	The product is usable with major restrictions on functionality.
3	support@inquira.com	16 business hours	The product is usable with minor restrictions on functionality.
4	support@inquira.com	3 business days	You have a question or an enhancement request pertaining to the software or the documentation.

InQuira Product Documentation

InQuira documentation is available only to licensed users of our software products and may not be redistributed in any form without express permission from InQuira, Inc.

The InQuira documentation is available in PDF format. It is packaged in the `/docs` directory, within the `/inquira` directory, for example:

`<InQuira_install_dir>/inquira/docs`

NOTE: You need a PDF reader application installed on each processor on which you plan to view the InQuira product documentation. The Adobe Acrobat reader is available from Adobe Systems at: http://www.adobe.com.

Detailed information about each product document set is available in:

- *Intelligent Search Documentation* on page 5
- *Intelligent Search Analytics Documentation* on page 6
- *Information Manager Documentation* on page 7
- *Contact Center Documentation* on page 8

If you encounter a problem, need help using the documentation, or want to report an error in the content, please contact InQuira Customer Support as described in *InQuira Customer Support* on page 3.

If you need help obtaining InQuira product documentation, or want to obtain permission to redistribute a portion of the contents, please contact your InQuira account representative.

Intelligent Search Documentation

Intelligent Search is distributed with the following documentation.

Document	Number	Description
Intelligent Search Installation Guide	IS80-IG-00	This guide is intended for technical staff who are responsible for installing InQuira 8.1. It provides detailed information on installing InQuira 8.1 and configuring the application on a single processor using the Installation Configuration Environment facility.
Intelligent Search Administrator's Guide and Reference	IS80-CA-00	This guide is intended for system and application administrators who need to configure an InQuira 8.1 application in an enterprise environment. It describes InQuira 8.1 integration, development, configuration, and maintenance processes and tasks.
Intelligent Search Language Administration Guide	IS80-LA-00	This guide is intended for business users and subject matter experts who need to create and maintain the language processing elements of a InQuira 8.1 application using the System Manager. This book provides usage information about the System Manager, conceptual information about the InQuira 8.1 language objects, and task information about the process of managing the user experience provided by the InQuira 8.1 application.
Intelligent Search Tuning Guide	IS80-LD-00	This guide is intended for application developers who need to create and maintain advanced InQuira 8.1 language-processing elements using the Dictionary and other InQuira Language Workbench applications.
Optimizing InQuira Intelligent Search	IS80-AG-00	This guide is intended for application developers who need to implement InQuira 8.1 advanced features, including Personalized Navigation and Process Wizards.
Intelligent Search Application Developer's Guide	IS80-API-00	This guide provides information about integrating and customizing the InQuira 8.1 Personalized Response User Interface.

Intelligent Search Language Reference	IS80-LRG-00	This guide is for language developers implementing InQuira 8.1 applications that utilize the intent libraries and advanced language processing functions. These guides are published as separate documents that provide reference information for each industry-specific intent library. Each reference also contains complete descriptions of InQuira Match Language and Variable Instantiation Language.
Intelligent Search User Interface Guide	IS80-UI-00	This guide is intended for application developers who need to customize the InQuira 8.1 Personalized Response User Interface, and integrate it with a production web application. It contains information about the elements and features of the User Interface, and provides guidelines for integrating it into an enterprise web architecture, customizing its appearance and functionality, and implementing various special features.

Intelligent Search Analytics Documentation

Intelligent Search Analytics is distributed with the following documentation.

Document	Number	Description
InQuira Analytics Installation Guide	IA80-IG-00	This guide is intended for technical staff who are responsible for installing Intelligent Search Analytics. It provides detailed information on installing and configuring the Intelligent Search Analytics product for use with an InQuira 8.1 application.
Analytics User Guide	IA80-CA-00	This guide is intended for systems and application administrators who need to configure the Intelligent Search and Information Manager Analytics components to report on InQuira 8.1 application performance.

Information Manager Documentation

InQuira Information Manager is distributed with the following documentation.

Document	Number	Description
Information Manager Installation Guide	IM80-IG-00	This guide is intended for technical staff who are responsible for installing InQuira Information Manager. It provides detailed information on installing and configuring the Information Manager product.
Information Manager Administration Guide	IM80-CA-00	This guide is intended for systems and application administrators who need to configure and administer an InQuira Information Manager application, and integrate it with an InQuira 8.1 application. It also contains information for general business users who need to use the Information Manager to create and manage content.
Information Manager Content Authoring Guide	IM80-AG-00	This guide is intended for technical staff who are responsible for authoring content in InQuira Information Manager. It provides detailed information on creating content and managing workflow tasks in the Information Manager console.
Information Manager Developer's Guide	IM80-WSR-00	This guide is intended for application developers who need to integrate Information Manager content, content category, and user and security functions with external applications. It contains reference information and examples for all packages, classes, methods, and interfaces of the Information Manager Web Services API.

Contact Center Documentation

The InQuira 8.1 contact center products are distributed with the following documentation.

Document	Number	Description
Contact Center Advisor Integration Guide	CA80-IG-00	This guide is intended for application developers and systems administrators who need to plan for and integrate the InQuira Contact Center Advisor with an InQuira application and a supported CRM application.
Intelligent Search Siebel Integration Guide	CAS80-IG-00	This guide is intended for application developers and systems administrators who need to plan for and integrate InQuira 8.1 with Siebel 7 Enterprise Applications using the Siebel Adapter for InQuira 8.1.

Screen and Text Representations

The product screens, screen text, and file contents depicted in the documentation are examples. We attempt to convey the product's appearance and functionality as accurately as possible; however, the actual product contents and displays may differ from the published examples.

References to World Wide Web Resources

For your convenience, we refer to Uniform Resource Locators (URLs) for resources published on the World Wide Web when appropriate. We attempt to provide accurate information; however, these resources are controlled by their respective owners and are therefore subject to change at any time.

Chapter 1 Installation Overview

This section describes:

- The available modes of installing and operating Information Manager

- The operating system-specific installation product distribution

- The installation process

- The system hardware, software, disk space and user privilege requirements for installing Information Manager.

It also provides information about the Information Manager application and its components to help you prepare for installing Information Manager in your environment.

IMPORTANT: The Information Manager is designed to operate only when the entire installation and configuration process is complete. Do not install or use individual Information Manager product components separately from the configured product unless specifically instructed by InQuira technical staff.

The Information Manager Product Distribution

Information Manager is distributed as the following platform-specific CD-ROMs containing the software components and the installation programs:

CD-ROM	Installation Program
Information Manager for Microsoft Windows	`install_im.exe`
Information Manager for Sun Solaris	`install_im.bin`
Information Manager for Linux	`install_im.bin`

The Installation Configuration Environment

The Installation Configuration Environment is a common operational environment for InQuira 8.1 applications that is installed and configured as part of the standard installation process. The Installation Configuration Environment contains tools and utilities that assist in creating, administering, and maintaining InQuira 8.1 instances and applications, enabling you to easily:

- Create and configure applications and instances

- Apply and remove patches and updates to product code

- Build and maintain customized InQuira 8.1 web applications

- Automate operations using external utilities, such as shell scripts

The Installation Configuration Environment provides system administration benefits, including:

- A single point of control for managing environment configuration

- Support for implementations using only one instance of InQuira 8.1 product code

- Support for a central Dictionary repository, shared by all applications

- Separate and standard locations for InQuira 8.1 product code and custom code

- Simplified integration and configuration of custom code that uses InQuira 8.1 services

- Access to commonly used environment variables

Information Manager System Requirements and Dependencies

Information Manager is supported by the general hardware, software, and disk space required for the InQuira 8.1 product.

See the *Intelligent Search Installation Guide* for complete InQuira 8.1 requirements, prerequisites, and dependencies including JVM requirements, as well as information about the packaged Apache Tomcat application server, an instance of which is also installed and configured as part of the standard Information Manager installation and configuration process.

See *Supported Databases* on page 11 for information on database requirements, dependencies, and recommended settings.

See Java Virtual Machine (JVM) Operational Parameters for information on recommended JVM parameters.

Supported Databases

Information Manager requires a JDBC-compatible database for content and metadata storage. Information Manager has been tested with the following databases:

Database	Supported Release Levels
Microsoft SQL Server	2000, 2005
Oracle	10g, Release 2

Database Properties

InQuira 8.1 and its related products and modules require the following database properties:

Oracle

For Oracle databases:

- Set the character encoding for the database instance to support UTF8. See the relevant product documentation for more information on character encoding settings.

- Set the OPEN_CURSORS to 600 or higher.

Microsoft SQL Server

For Microsoft SQL Server databases, specify the value of the collocation parameter:

Latin1_General_CI_AS

where:

CI	indicates case insensitivity
AS	indicates accent sensitivity

IMPORTANT: If case sensitivity is not properly set, you may incur unique key violation errors when loading application data.

Java Virtual Machine (JVM) Allocation Requirements

You must allocate sufficient memory to the Java Virtual Machine (JVM) process for the InQuira 8.1 application and the associated web or application server. The appropriate memory allocation, stack size, heap size, and garbage collection parameters vary depending on several factors, including:

- The resources available to the JVM in your environment

- The amount of application content you need to process

In general, you should attempt to use the highest values supported by your environment. InQuira Customer Support can provide guidelines and advice to help determine appropriate parameters for your specific application and environment. See *InQuira Customer Support* on page 3 for information on contacting InQuira Customer Support.

Information Manager Application Components

An Information Manager application uses the following components, which are installed and configured in the standard installation process. You can configure Information Manager components on a single server or distribute them throughout a network. The following diagram illustrates the relationships between the logical application components:
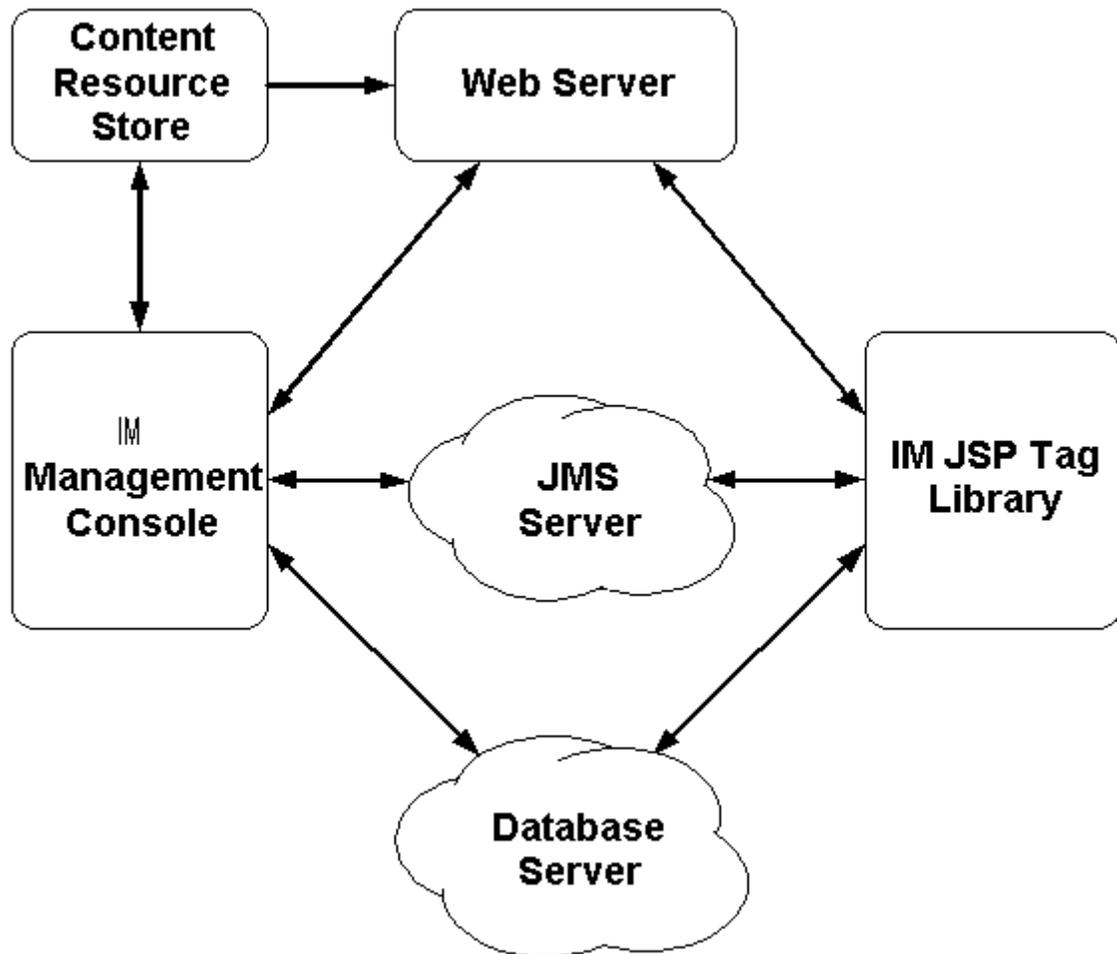
Component	Description
Java Messaging Server (JMS)	Information Manager uses a JMS server to publish database changes from the Management Console. JSP Tag Library applications are subscribers to the JMS changes.
	The JMS server can publish changes to multiple Information Manager applications in a network.

Information Manager Tag Library Web Applications	Information Manager uses a J2EE servlet container supporting Java 1.4.x JSP tag libraries to distribute Information Manager application content.
Web Server	You can integrate the web server for an Information Manager application into the servlet container or configure it as a standalone server. The web server is the only component that must be exposed to end users. The web server supports most servlet containers including Tomcat, WebLogic, WebSphere, Jboss, and JRun.
Information Manager Content Resource Store	The Information Manager Content Resource Store stores resources (files) that are attached to content records in the application. The content resource store is a directory on a file system that is accessible to the Management Console and the application web server. It can be located on the same server as the Management Console, or on a network file system. You can configure Information Manager to maintain separate staging and production resource stores. Resources can be served by separate web servers or configured to use resource caching services (such as Akamai). The content resource store stores XML versions of content records used for search indexing, and tracks all versions of content records and attached resources.
Management Console	The Management Console is a web-based user interface to all content creation and management functions. The Management Console can be replicated on multiple servers. Management Consoles publish changes to the JMS.
Database Server	The Information Manager database stores the Information Manager content management objects. The installation process automatically creates the required tables in a specified database.
Information Manager Web Services	Information Manager now provides an open set of web services to support adding and modifying content, content categories, and user information from external applications.

Installation Modes

You can install Information Manager in either of two modes:

- Standard installation mode, which installs Information Manager into an existing InQuira 8.1 application

- Stand-alone mode, which installs Information Manager as a stand-alone application, independent of any InQuira 8.1 application

See *Information Manager Application Configurations* on page 15 for information on selecting the correct installation program for each mode.

Information Manager Application Configurations

This section provides information about installing Information Manager in the following configurations:

- A single-server (default installation) environment as described in *Single Server Installation* on page 16.

- A multiple server environment as described in *Multiple Server Installation* on page 16.

- A clustered server environment as described in *Clustered Installation* on page 17.

Single Server Installation

The standard installation process using the packaged installation program installs and configures all Information Manager components on a single processor. The standard process requires an existing InQuira 8.1 instance on the target processor.

In a single processor environment:

- Information Manager uses the OpenJMS JMS server on the local host. In order to propagate changes made in the Management Console, all web applications must share the JMS settings specified in the file:

  <IM_HOME>/config/<repository>/application.properties

where:

<IM_HOME>	specifies the Information Manager base directory
<repository>	specifies the application repository

- The Information Manager Content Resource Store is created on the local file system

- The servlet engine serves images and accesses the Information Manager applications

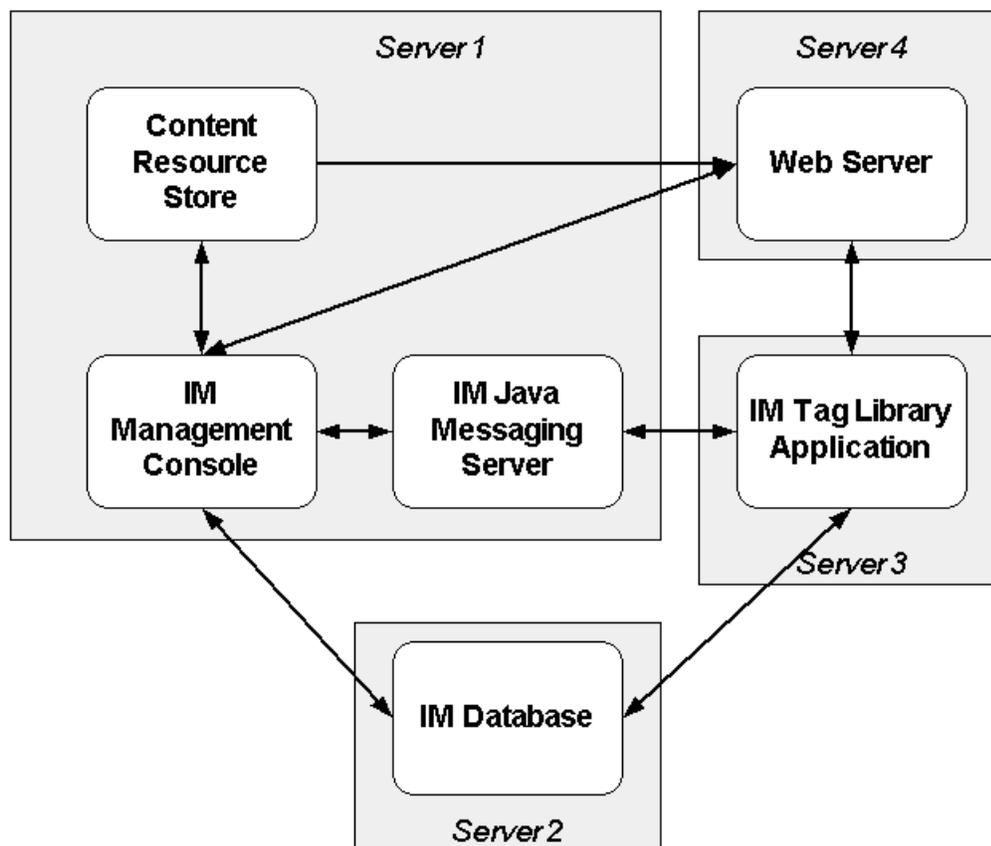## Multiple Server Installation

In an multiple processor environment, the Information Manager components are typically installed remotely from the Intelligent Search components. Each physical server must have be configured to use a separate IM_HOME directory.

The Management Console and the tag library applications can be located on separate remote servers; one server must have an installed and configured JMS server. All Information Manager applications must refer to the same JMS server to receive updates.

The Information Manager Content Resource Store can be stored using FTP or local copy, either on a network file system or on a local file system on the same processor as the

Management Console. The file system must be visible to a web server to serve the attached resources.


Clustered Installation

You can install and configure Information Manager in a clustered environment, similar to multiple server installation. In a clustered environment, the Information Manager cluster is managed by the servlet container, and requires a cluster-aware JMS server.

You must configure each Information Manager application to refer to the virtual JMS server. Ensure that tag library applications are stateless or that you enable "sticky" sessions in the cluster. For multiple Management Console applications, you must also ensure that "sticky" sessions are enabled.

The Information Manager Content Resource Store should be installed on a network-attached storage system with RAID support, and the content database should also be clustered. Information Manager log files should be written to network-attached storage,

and each server in the cluster should generate its own log file names. We recommend
using external load balanced web servers.
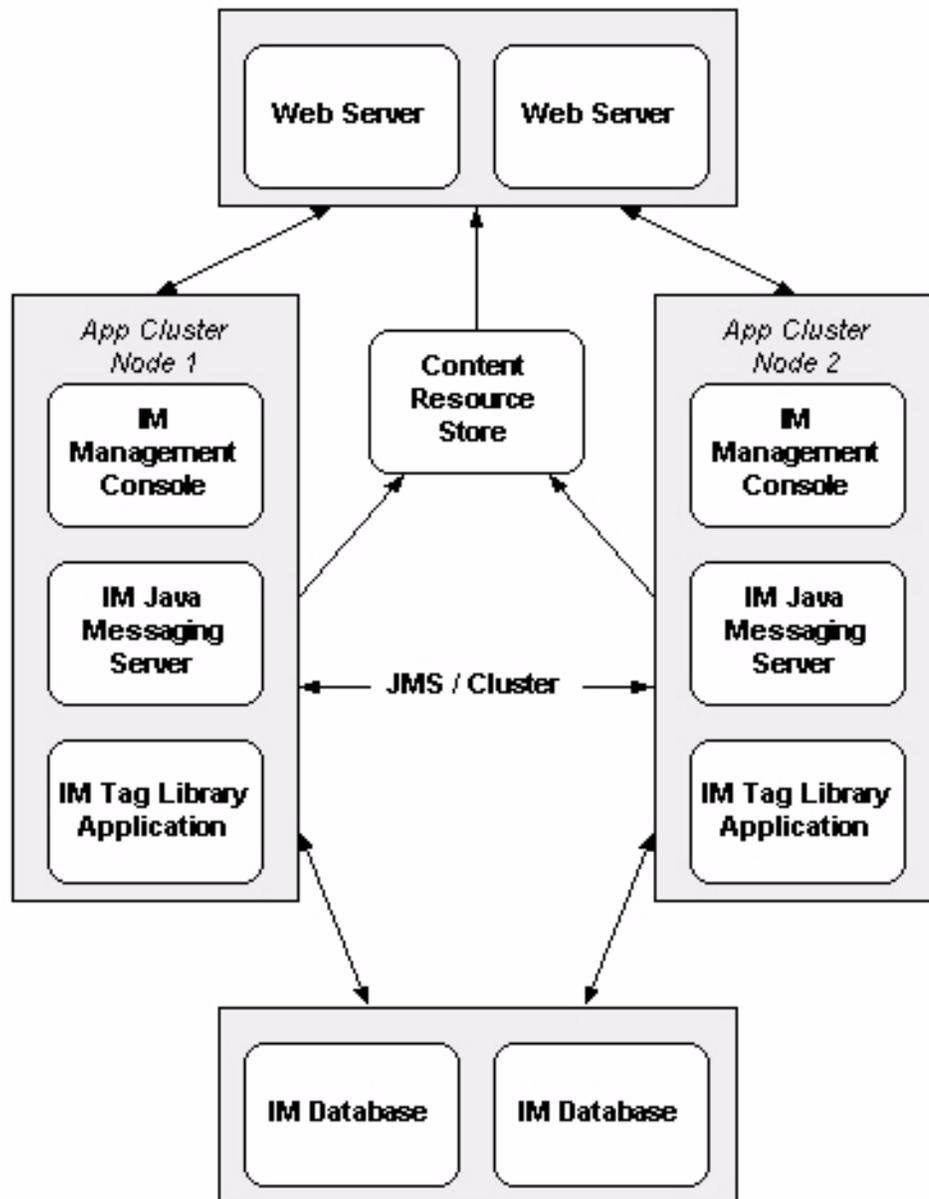
Chapter 2   Installing and Configuring Information Manager

The Information Manager installation process uses an automated program that copies the Information Manager product files from the product distribution and installs and configures Information Manager with an existing InQuira 8.1 application.

NOTE: The example path, directory, and file names in this guide follow Microsoft Windows naming conventions. Specific Solaris and Linux information is provided where necessary for clarity. Operating system-specific procedure steps are noted in section or topic headings, or within topics, as appropriate.

IMPORTANT: Before installing Information Manager, ensure that requirements and prerequisites are satisfied, and that appropriate personnel with access to the specified environments are available to perform the installation, as described in *Information Manager System Requirements and Dependencies* on page 11.

The Installation Process

The Information Manager installation process uses an automated program that installs and configures:

- The Information Manager product components, including the Management Console, the JSP Tag Library, and the optional Information Manager Web Services

- The Information Manager content database schema

The installation process consists of the following steps:

- Start the installation program as described in *Starting the Installation Program* on page 21.

- Supply the following information to the installation program:

  - The location of the InQuira 8.1 instance in which you want to install Information Manager (for the standard installation process)

  - Information about the database that you will use to store Information Manager content

  - Administrator email information

  - Information about how you will store and retrieve content resources (files such as text documents and spreadsheets) that are attached as supporting documents for Information Manager content items

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IMPORTANT: Before installing Information Manager, ensure that requirements and prerequisites are satisfied, and that appropriate personnel with access to the specified environments are available to perform the installation.

When the installation process is complete, you can configure a web application by:

- Defining the application repository and the initial administrative user

- Registering the web application, as described in *Chapter 3, Configuring a Web Application*.

Information Manager contains a packaged sample application, called *Information Center*, to assist you in getting started with the system. This guide contains examples of configuring and deploying the sample application.

Starting the Installation Program

Start the installation program by locating and executing the appropriate version of the installation program for your environment.
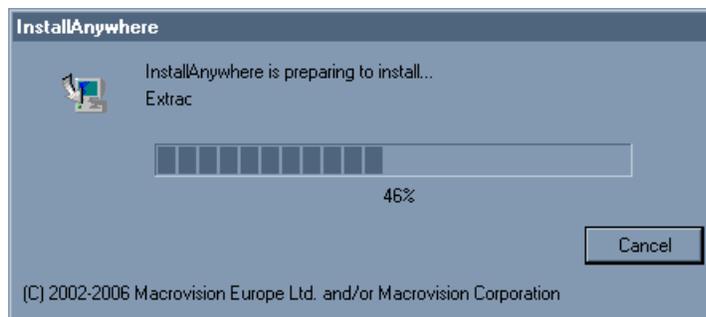
To start the installation program in Microsoft Windows environments:

- Execute `install_im.exe`

To start the installation program in Solaris and Linux environments:

- Execute `install_im.bin`

The installation program starts:

When the initialization progress dialog completes, the installation program displays the introduction screen.

The Information Manager Installation Introduction

The installation program's introduction screen provides general information about the installation process and recommends that you close any other programs that are currently running.
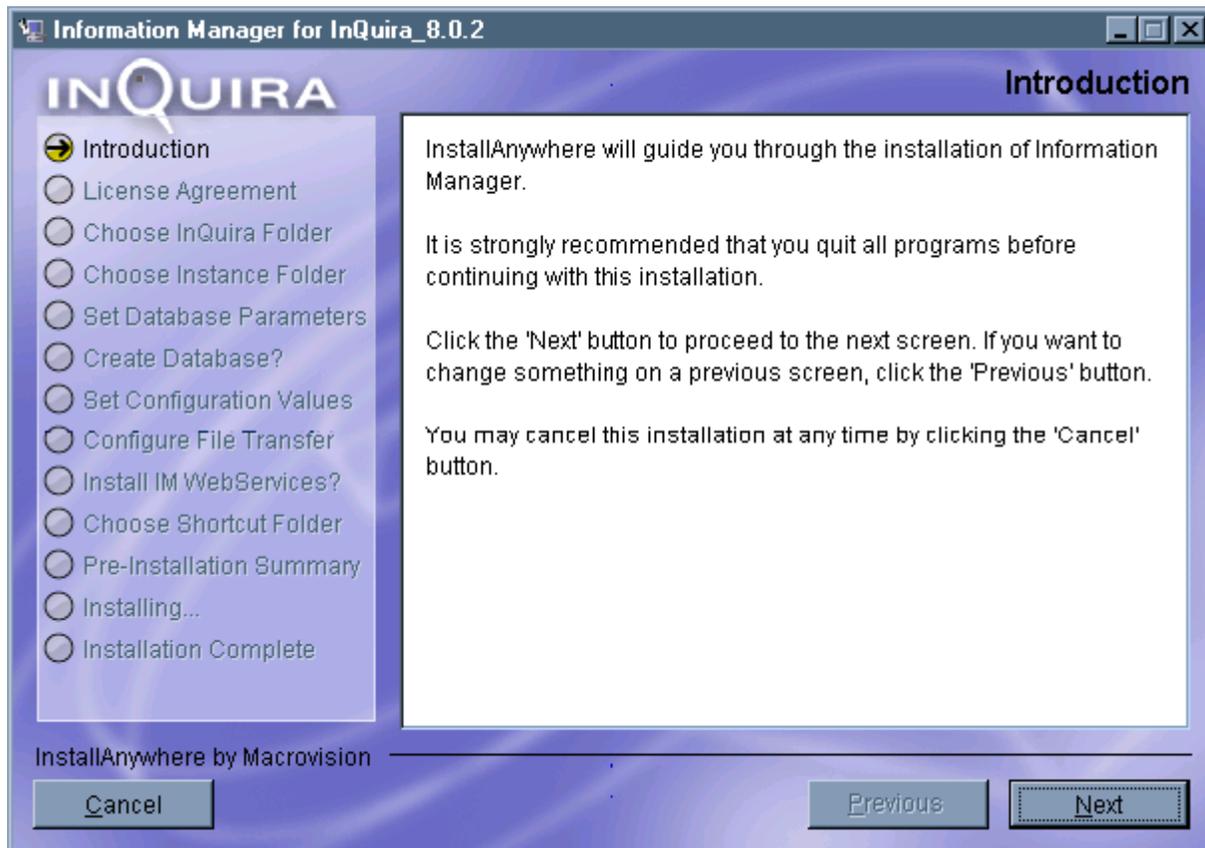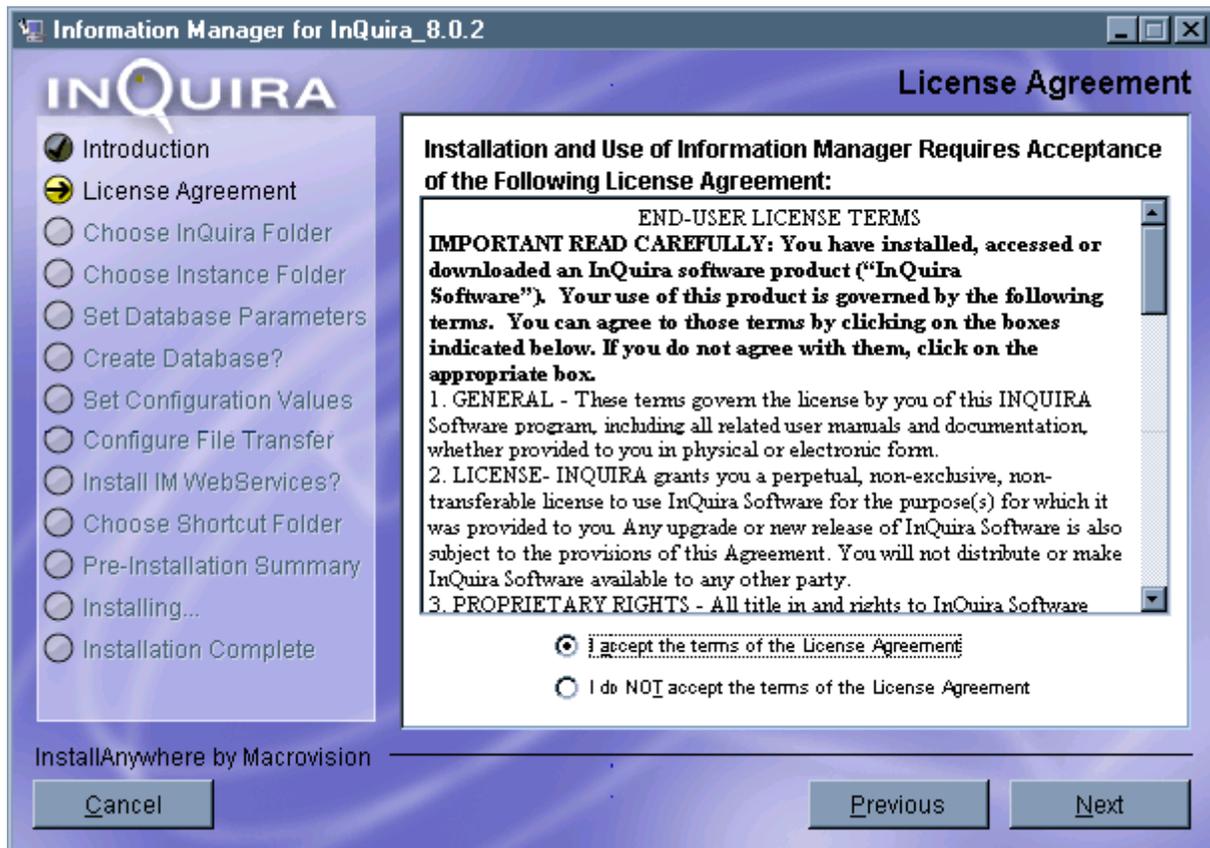

- Select **Next** to continue

The installation program displays the Information Manager license agreement.

Accepting the Information Manager License Agreement

The Information Manager license agreement specifies the legal terms of use. You must agree to these terms to install and use Information Manager. Please read the agreement carefully; by agreeing, you are legally bound to its terms and conditions.

The installation program sets the license agreement to non-acceptance by default. To accept the license agreement and continue the installation:

- Select the accept option

The Next option is now available.

- Select **Next** to continue

The installation program displays the installation location selection screen.

Selecting the Installation Location

Select the location at which you want to install Information Manager.

The installation program displays the default InQuira 8.1 installation directory:

- `C:\Inquira_8.1` in Windows environments
- `<user_home>/InQuira_8.1` in Solaris and Linux environments

IMPORTANT: For standard installations, you must install Information Manager in the base InQuira 8.1 application directory (for example: `C:\InQuira_8.1`). For standalone installations, you can install at any location.
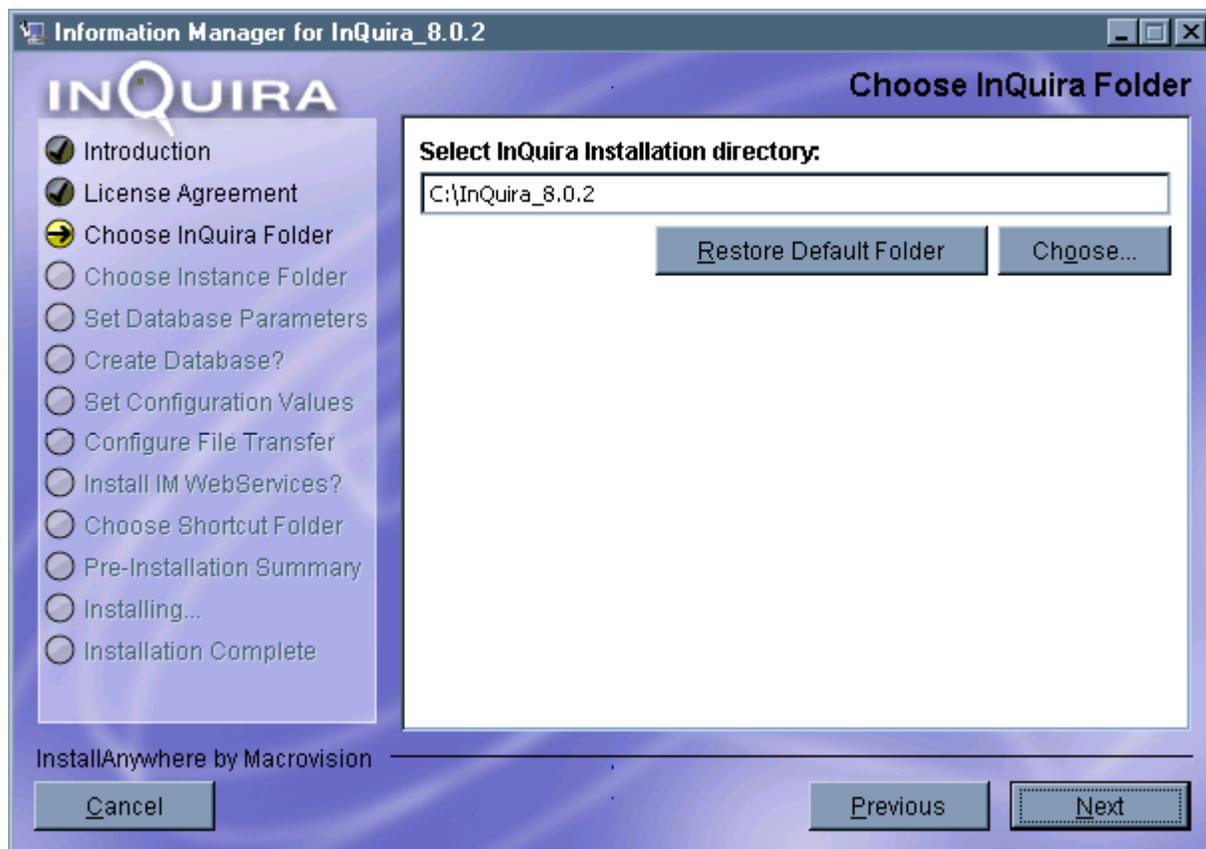
- Specify the appropriate location

NOTE: You can use the Choose... option to open a file browser and select an alternate InQuira 8.1 base directory. Use the Restore Default Folder option to reset the default installation directory, if necessary.

- select **Next** to continue

For standard installations, the installation program displays the instance selection screen. For standalone installations, the installation program displays the database type selection screen as described in *Specifying the Information Manager Database Type* on page 28.

Selecting the Instance Folder

Select the InQuira 8.1 instance folder into which you will install the Information Manager application server.

NOTE: This step is omitted when you install Information Manager as a standalone application.

InQuira 8.1 applications support multiple instances suited for various application functions. The recommended installation and configuration process creates a content processing instance and a request processing instance. Each sub-directory of the `<InQuira_base_dir>\instances` directory contains a defined instance. See the *Intelligent Search Administration Guide* for more information on supported instances.

NOTE: We recommend that you install Information Manager in the content processing instance of the InQuira 8.1 application.
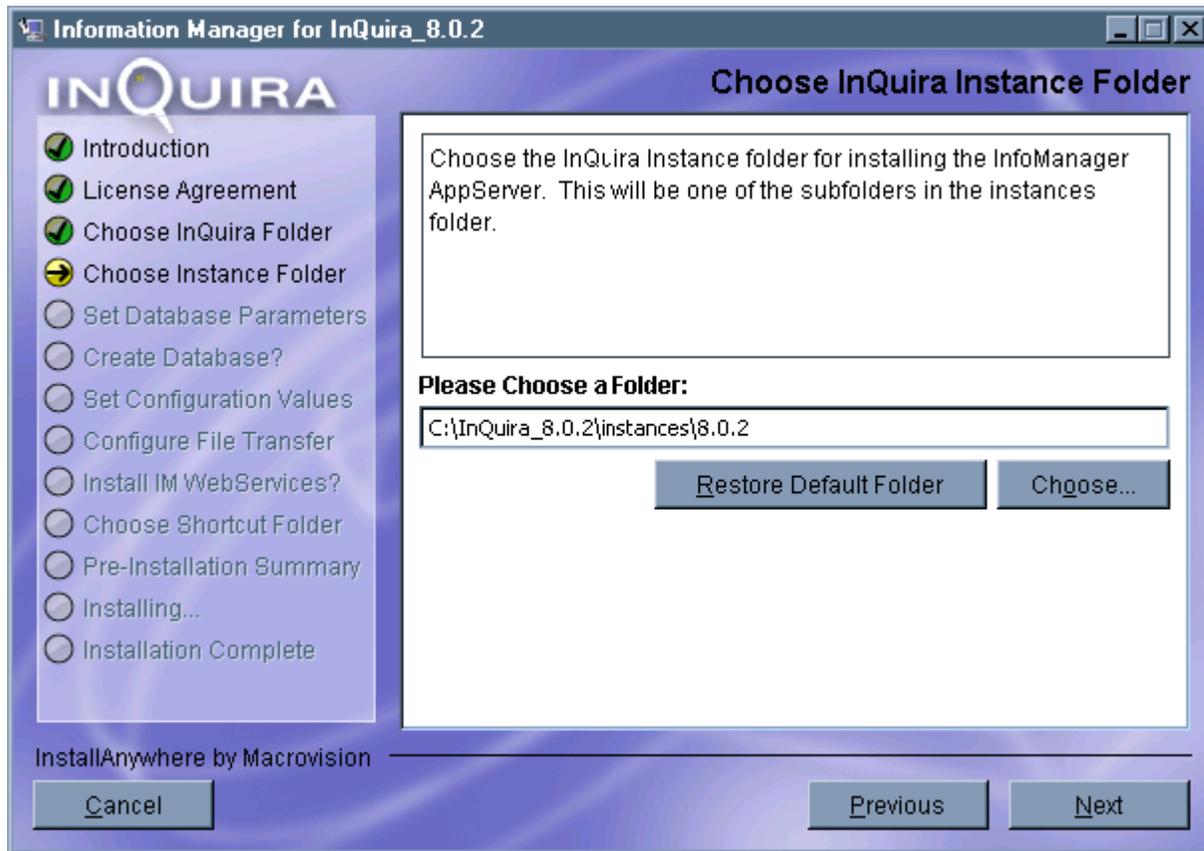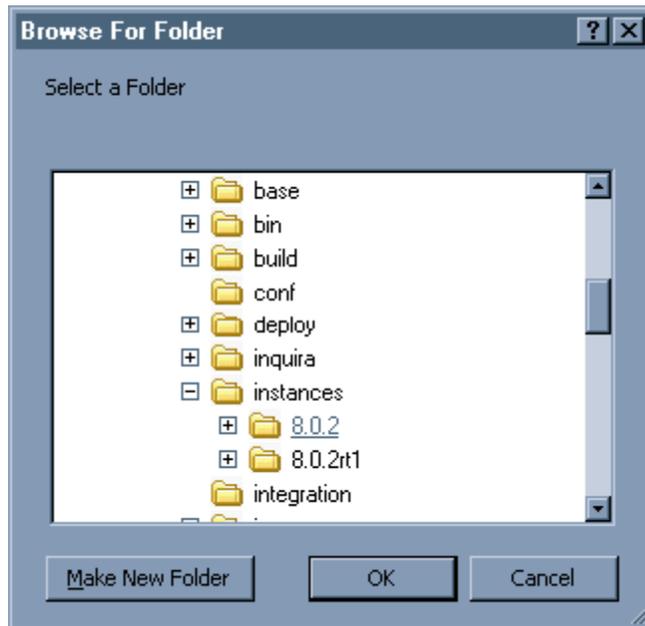

- Select the **Choose...** option to locate the appropriate instance directory

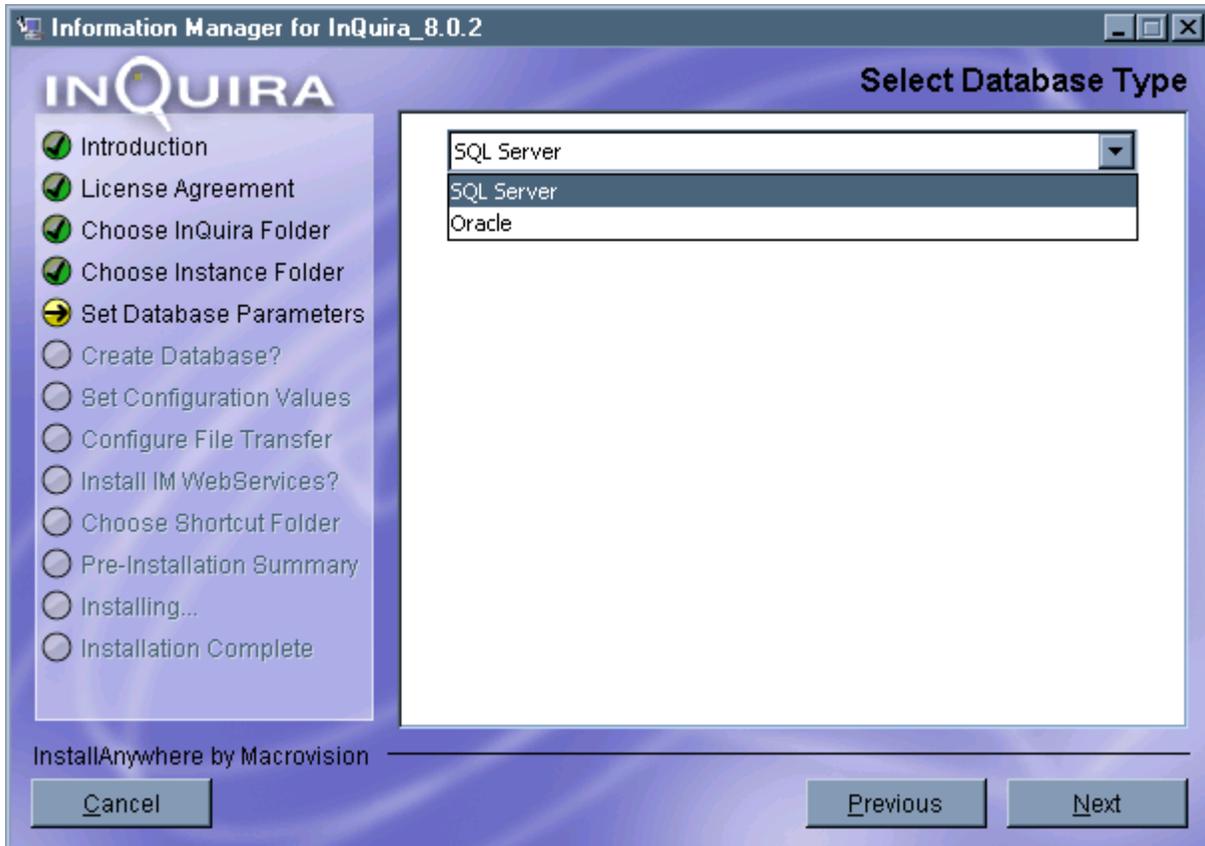The installation program displays a file explorer:

- Locate and select the appropriate directory
- Select **Next** to continue

The installation program displays the database type selection screen.

Specifying the Information Manager Database Type

Select the type of database that you will use for the Information Manager. The installation process will prompt you to automatically create the database tables if they have not been created previously. See *Information Manager System Requirements and Dependencies on page 11* for more information on supported databases.
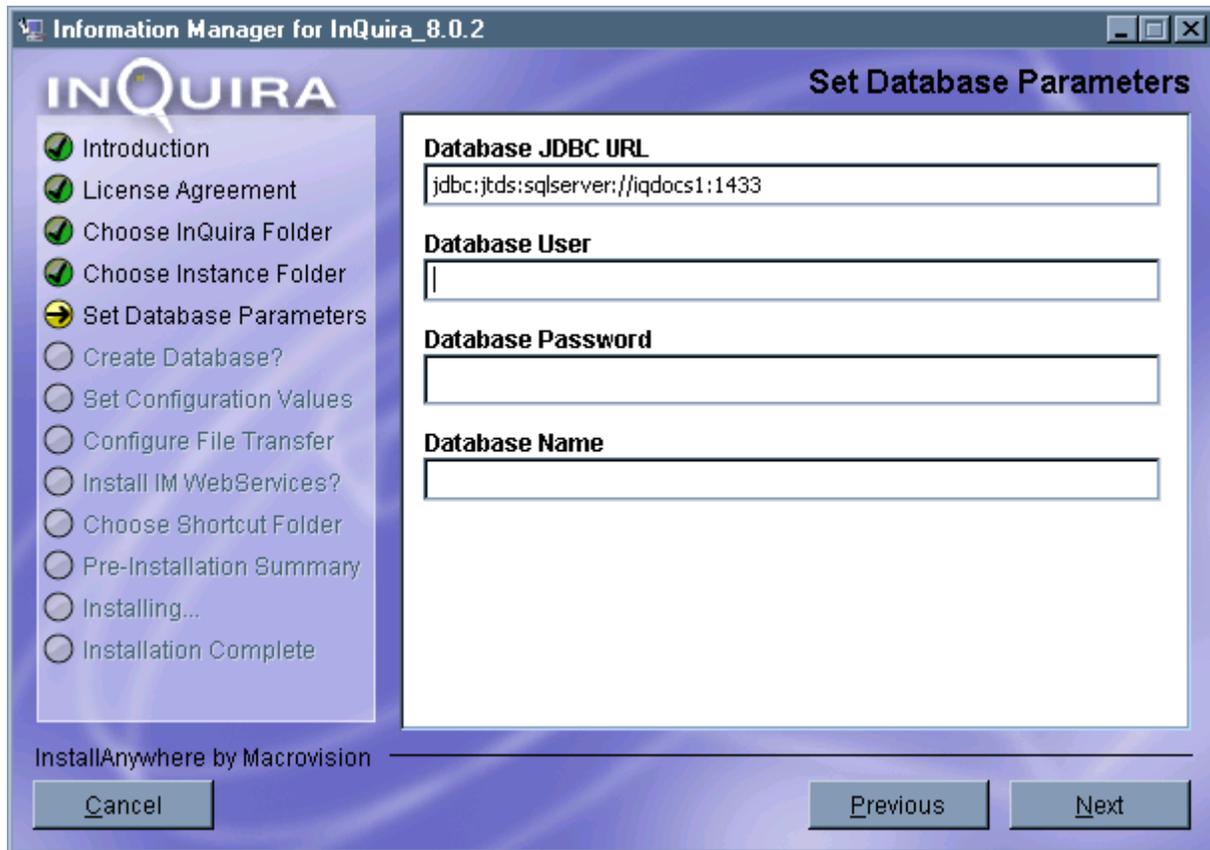

- Select the appropriate database type
- Select **Next** to continue

The installation program displays the database connection properties screen.

Specifying Database Connection Properties

Specify the connection properties for the Information Manager database.

- Specify the appropriate values for the following database parameters:

Database Property	Description
Database JDBC URL	specify the connection URL for the JDBC connection. The installation program populates this field with a template based on the specified database type and the local hostname. Edit the connection URL as appropriate for your RDBMS and JDBC driver.
Database User	specify the user name to use for the specified database
Database Password	specify the password to use for the specified database
Database Name	specify the database name

- Select **Next** to continue

The installation program displays the database table creation screen.

Specifying Database Table Creation

Specify whether the installation program will automatically create the Information Manager data tables in the specified database. If you do not create the tables during installation, you must create the tables manually as described in the *Information Manager Administration Guide* prior to using the Information Manager.
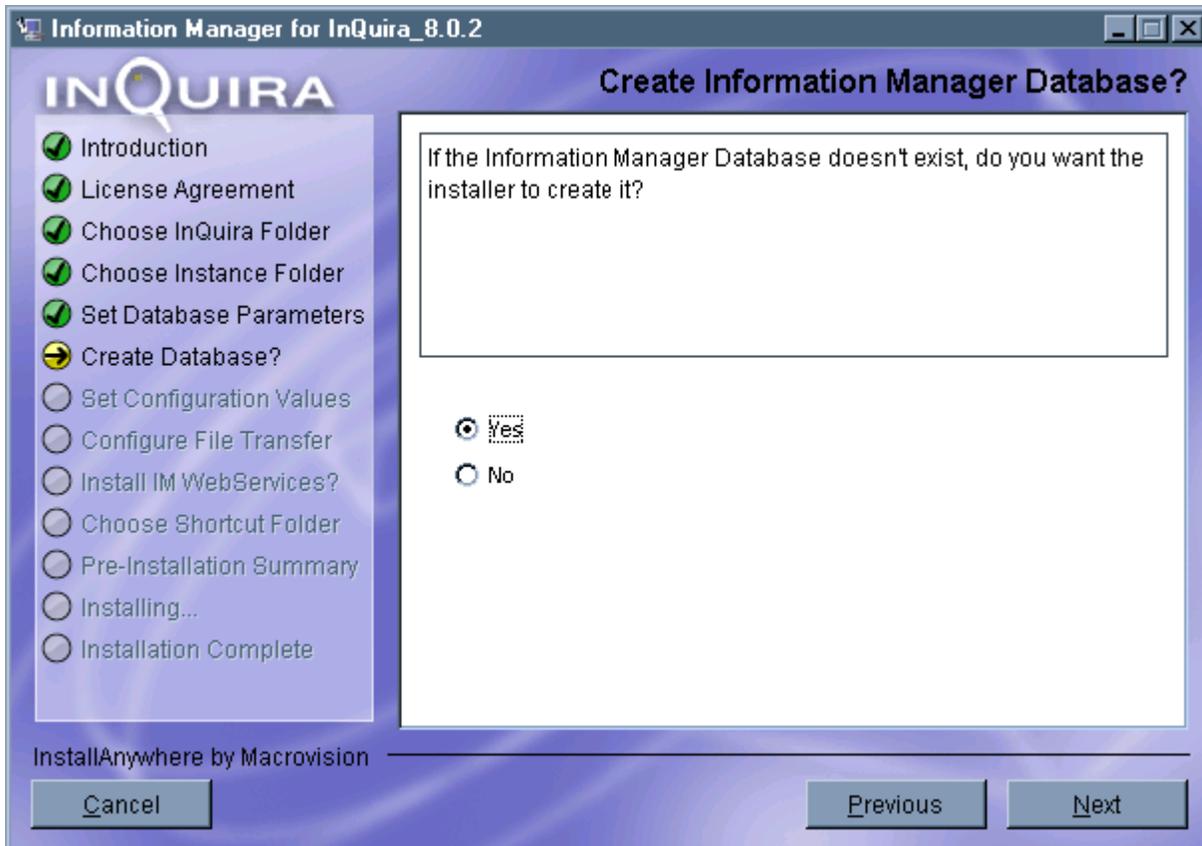

- Select the desired option
- Select **Next** to continue

The installation program displays the email and database server configuration screen.

Configuring Email and Database Server Properties

Specify the hostname of the email server for your organization, an Information Manager administrator email address, and the hostname and port for the Information Manager database server.
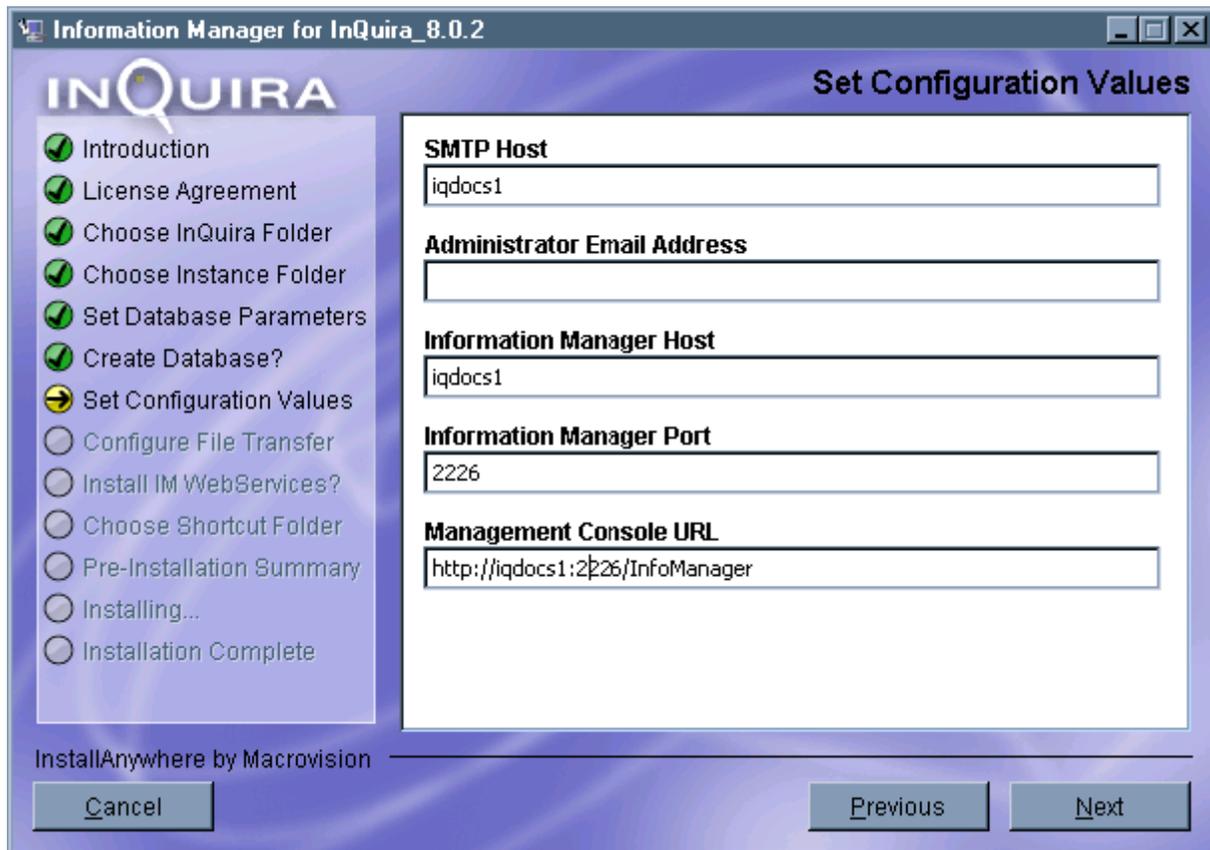
- Specify the appropriate values for the following email and database parameters:

Property	Description
SMTP Host	specify the hostname of email server to use for email-related functions
Administrator Email Address	specify the an email address for the Information Manager administrator
Information Manager Host	specify the hostname for the Management Console and Information Center applications
Information Manager Port	specify the port for the Management Console and Information Center applications

- Select **Next** to continue

The installation program displays the content resource file transfer method selection screen.

Specifying the File Transfer for Content Resource Files

Information Manager stores additional files submitted as attachments (content resources) to primary content objects. Specify whether you will use an FTP server to store content resources, or whether you will store them on a local file system.

The installation program will prompt you for additional configuration parameters based on the type of file transfer you select.

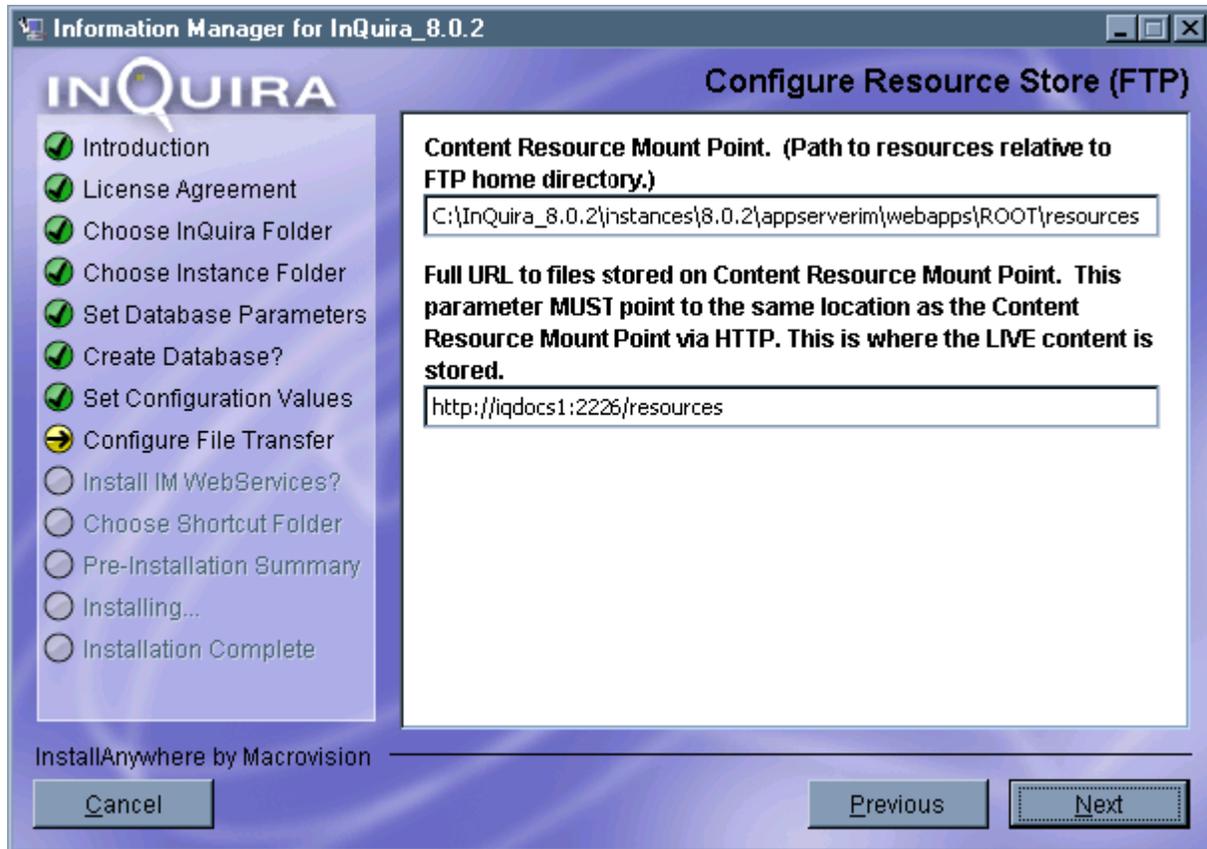| If you want to store content resources...	Select...	Result:
on an FTP server	**Yes**	The installation program displays the FTP content resource store configuration screen as described in *Configuring an FTP Server Content Resource Store* on page 34.
on a local file system	**No**	The installation program displays the local content resource store configuration screen as described in *Configuring a Local File System Content Resource Store* on page 39.
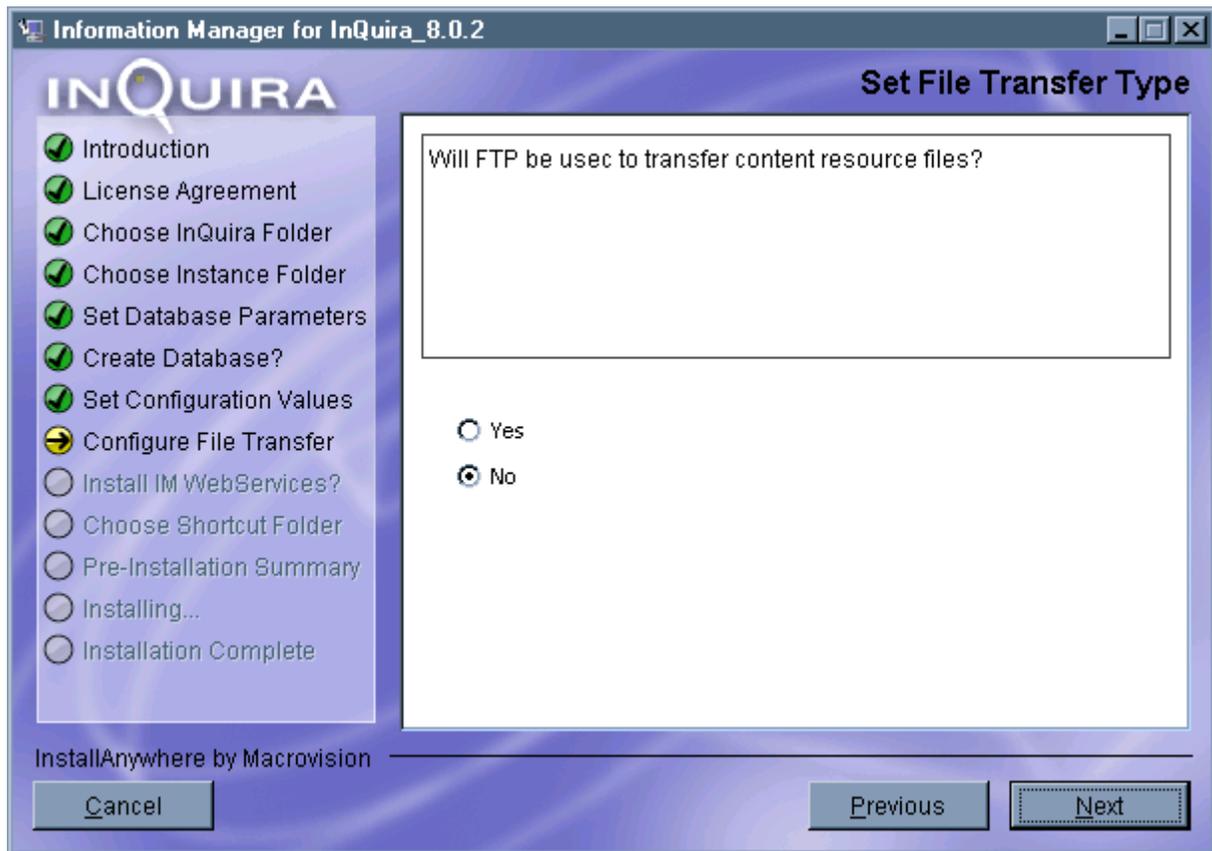
- Select the desired option

- Select **Next** to continue

The installation program displays the appropriate resource file location configuration screen.

Configuring an FTP Server Content Resource Store

If you select Yes on the file transfer method screen, the installation program displays the Configure Resource Store (FTP) screen, which prompts you to configure a mapped drive or mount point location and URL for Information Manager storage of, and access to, content resources (document attachments to Information Manager content records) for the production instance.

- Specify the following FTP server parameters:

| Resource Store Parameter	Description
Content Resource Mount Point	Specify a location on a locally mapped drive (Windows) or mount point (Linux and Solaris) for the location that Information Manager will use to write (save) documents attached to content records. The specified location must be accessible to the Information Manager application server, and the application server must have READ and WRITE permissions to the directory. NOTE: The specified directory must exist or be manually created prior to using Information Manager; the installation program will not create this directory.
Full URL to Content Resource Mount Point	Specify the URL that corresponds to the mapped drive or mount point location specified as the content resource mount point. Information Manager will use the URL to read (retrieve) documents attached to content records in the production environment.

- Select **Next** to continue

The installation program displays the FTP file transfer configuration screen.

Configuring File Transfer (FTP) Parameters

The Configure File Transfer (FTP) screen prompts you to configure the FTP server for the application.

NOTE: You can configure a separate FTP server for use with a staging (pre-production) instance as described in *Specifying an FTP Staging Server* on page 37.
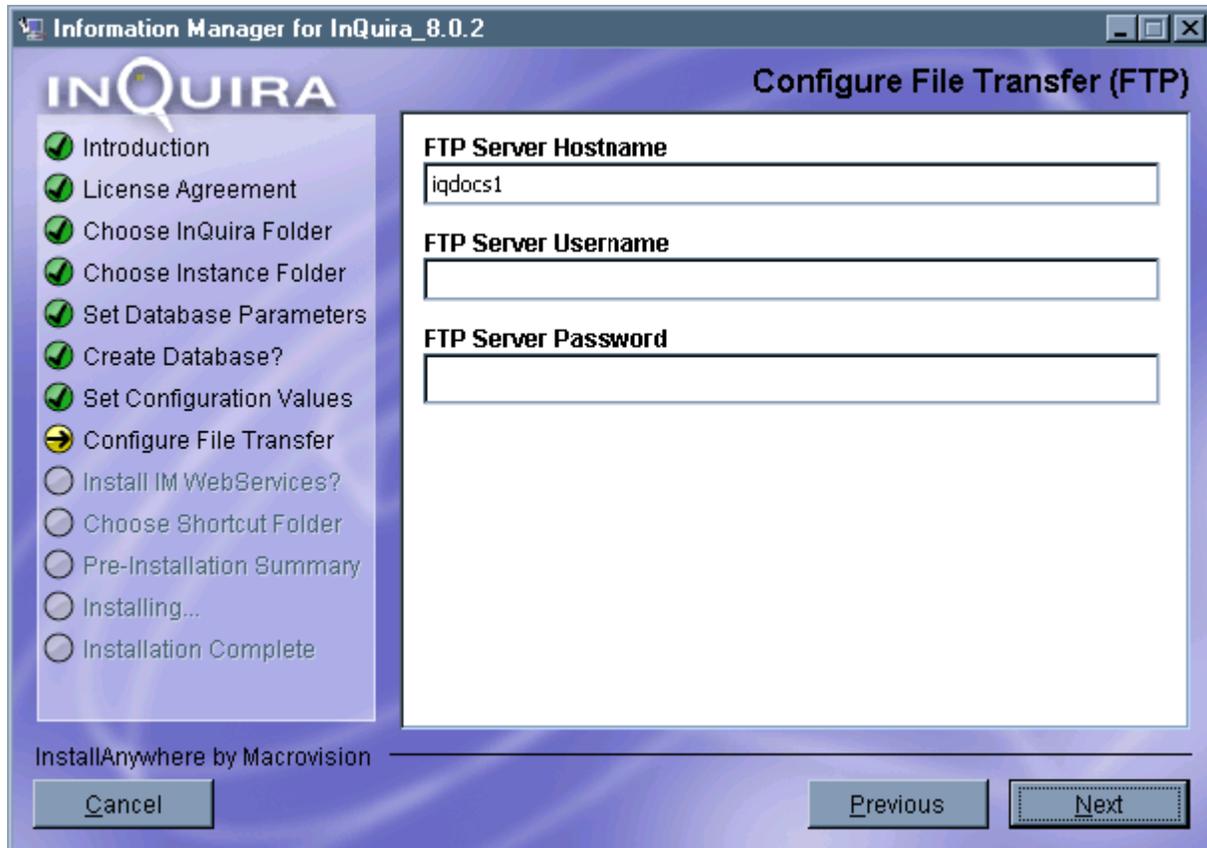
- Specify the following FTP server parameters:

| FTP Server Property	Description
FTP Server Hostname	Specify the hostname for the FTP server.
FTP Server Username	Specify the user name for the FTP server.
FTP Server Password	Specify the password for the FTP server.

- Select **Next** to continue

The installation program displays the FTP staging server option screen.

Specifying an FTP Staging Server

You can configure a separate FTP server for a staging (pre-production) Information
Manager instance to validate the application prior to making it available to users in a
production environment.
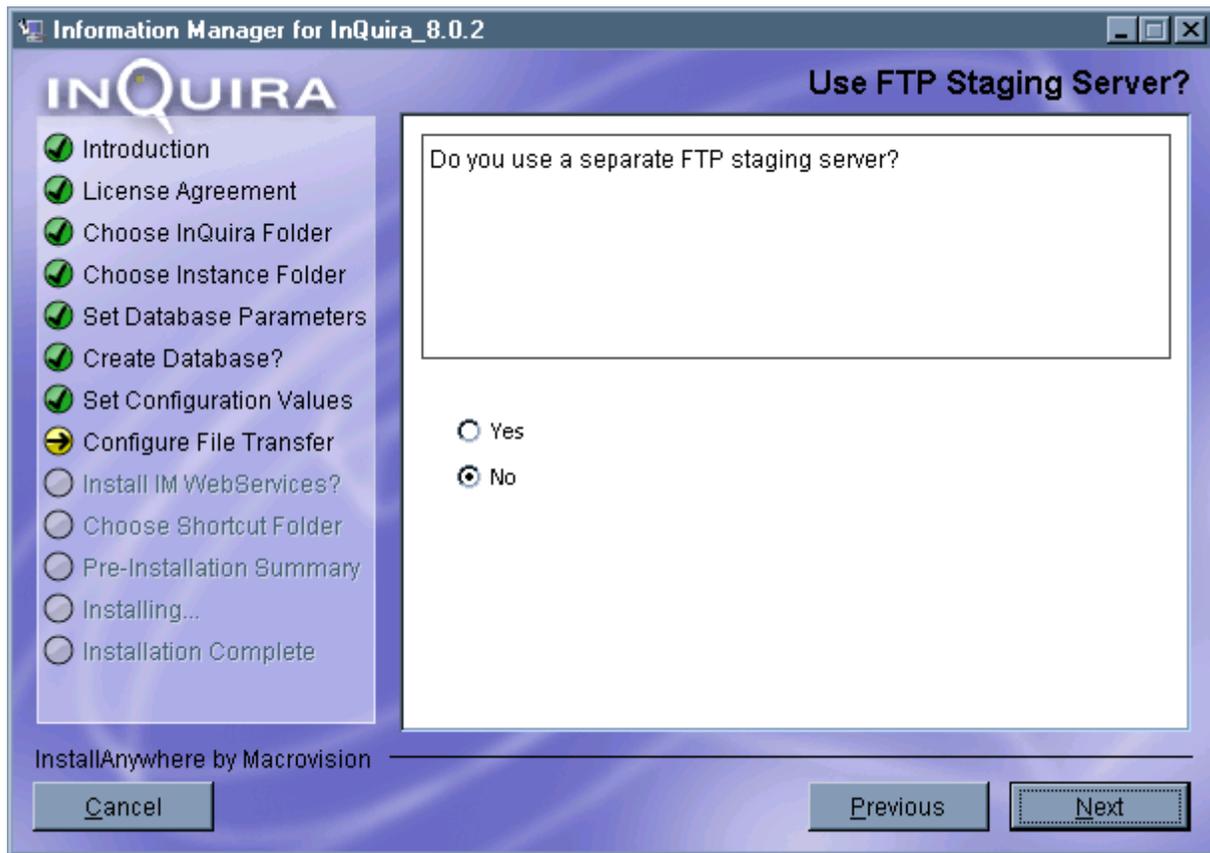
- Select **Yes** to configure a separate FTP staging server

The installation program displays the FTP staging server configuration screen as described
in *Configuring the FTP Staging Server* on page 38.

  or

- Select **No** if you will not use a separate staging instance

The installation program displays the Information Manager Web Services installation
option screen as described in *Installing Information Manager Web Services* on page 41.

Configuring the FTP Staging Server

The Configure Staging Server (FTP) screen prompts you to configure an FTP server for the staging application.
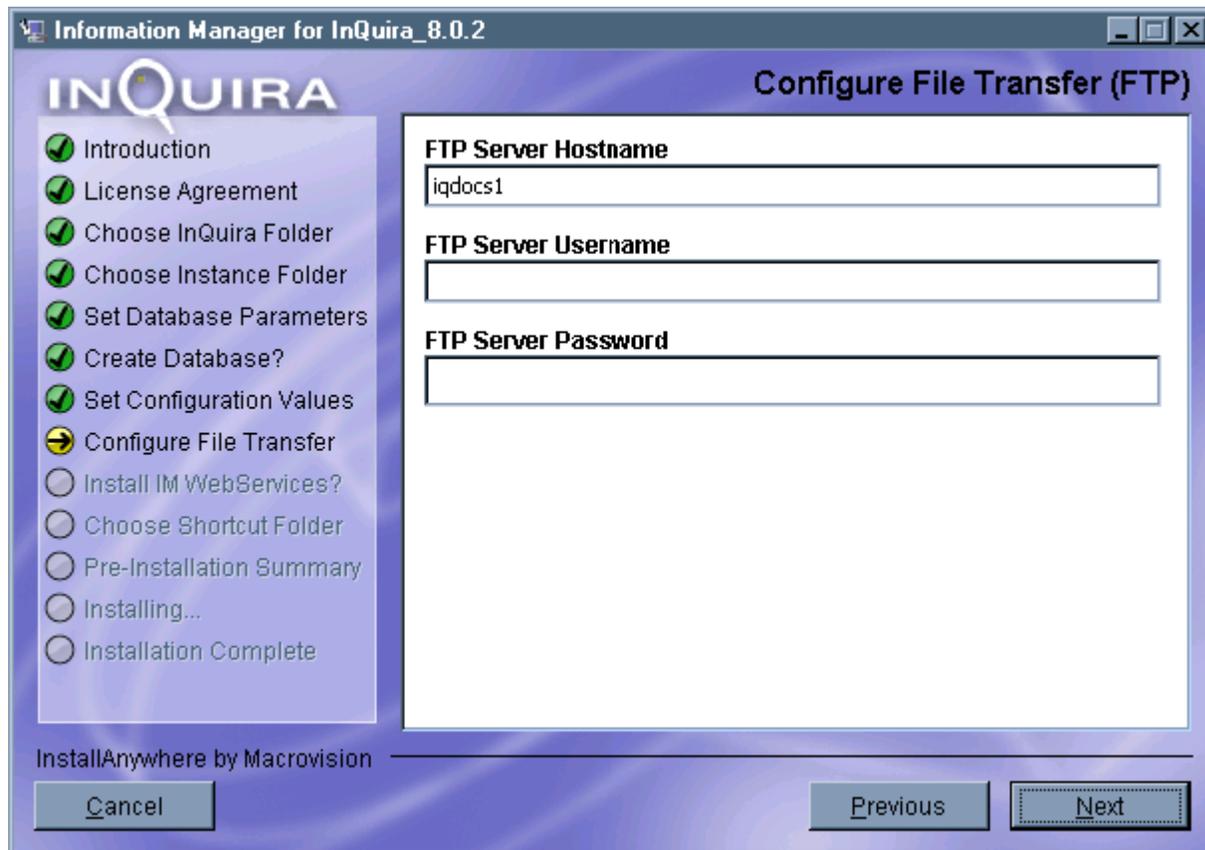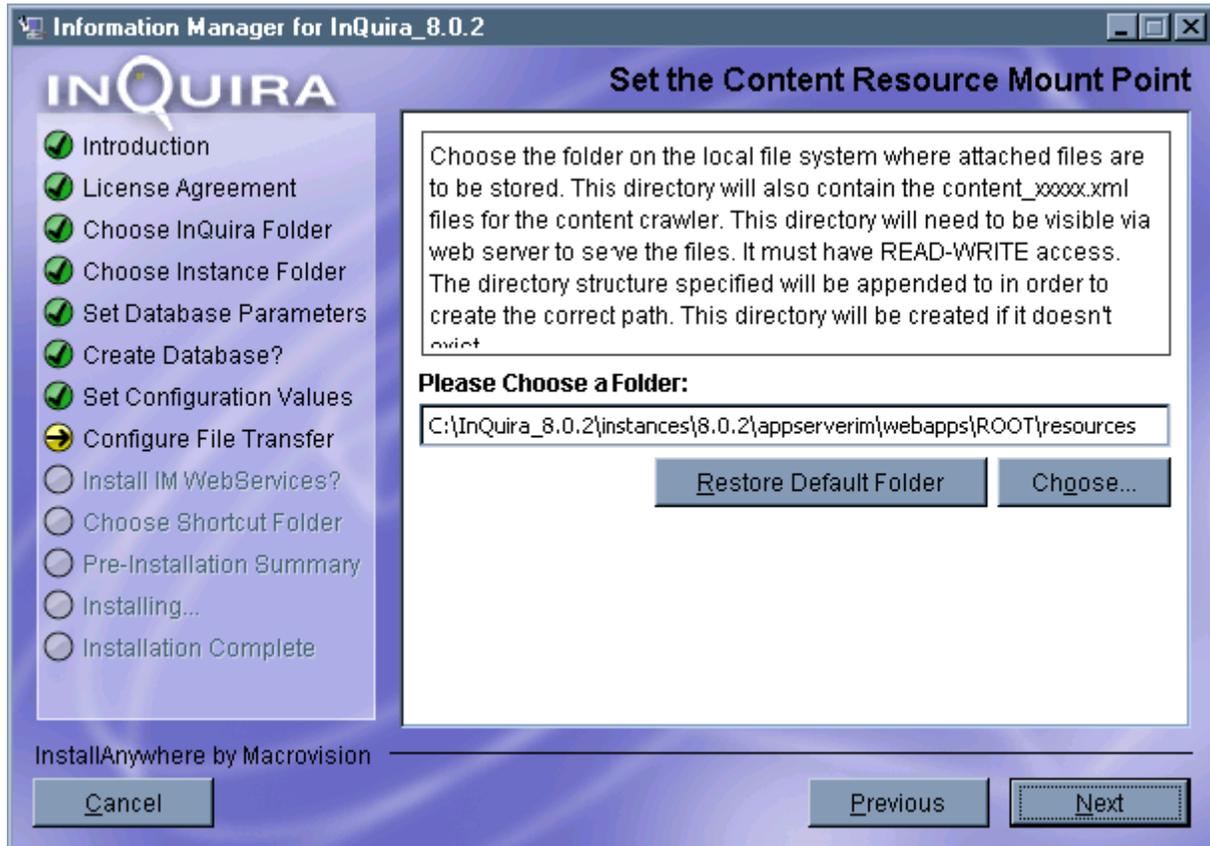

- Specify the following FTP server parameters:

File System Property	Description
FTP Staging Server Hostname	Specify the hostname for the FTP staging server.
FTP Staging Server Username	Specify the user name for the FTP staging server.
FTP Staging Server Password	Specify the password for the FTP staging server.
Full URL to files stored on Content Resource Mount Point	Specify the URL that corresponds to the mapped drive or mount point location specified as the content resource mount point. Information Manager will use the URL to read (retrieve) documents attached to content records in the staging environment.

- Select **Next** to continue

The installation program displays the Information Manager Web Services installation option screen as described in .

Configuring a Local File System Content Resource Store

If you select No on the file transfer method screen, the installation program displays the Set Content Resource Mount Point screen, which prompts you to configure a local directory for Information Manager storage of, and access to, content resources (document attachments to Information Manager content records) for the production instance.

- Specify the full path to a directory on the local file system for the location of file attachments. The specified location must be accessible to the Information Manager application server, and the application server must have READ and WRITE permissions to the directory.
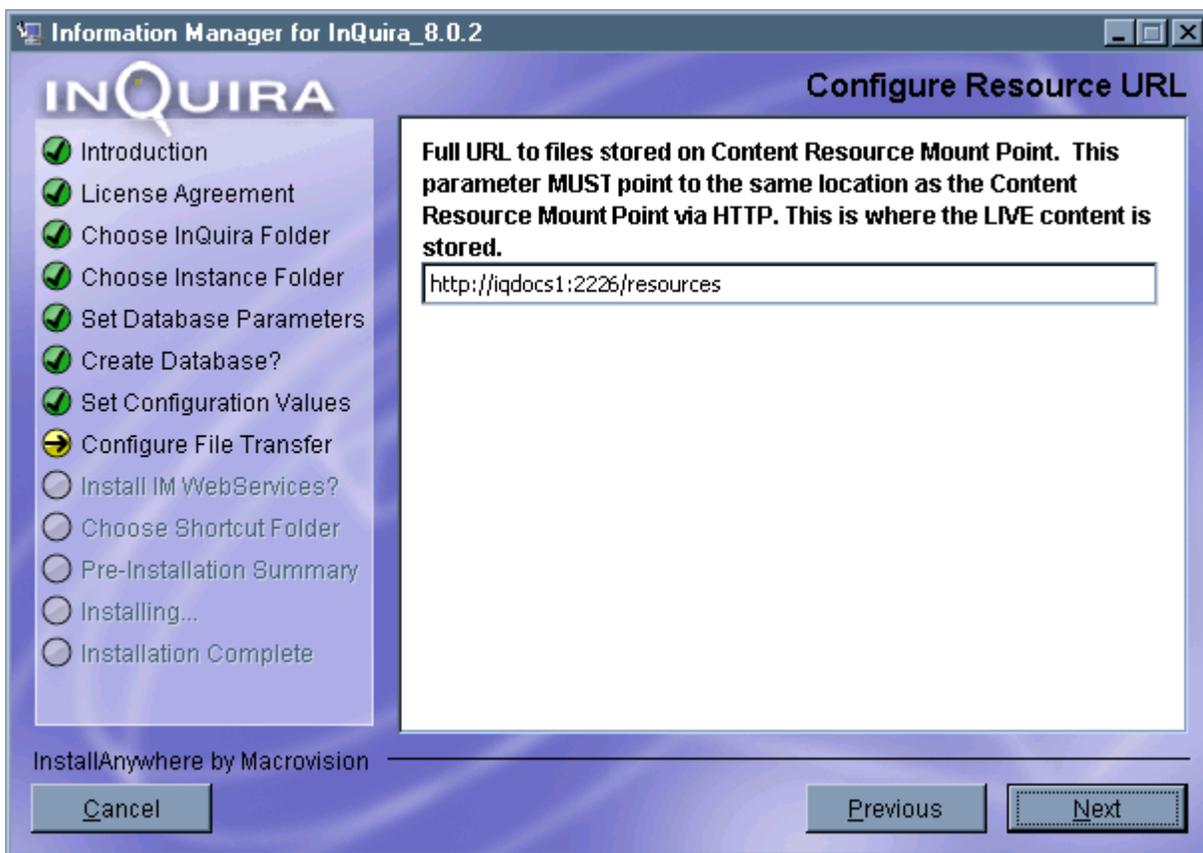
- Select **Next** to continue

The installation program displays the content resource URL configuration screen.

Configuring the Content Resource URL

Specify a URL for the local directory that you specified as the content resource store.


- Specify the URL that corresponds to the local directory specified as the content resource location. Information Manager will use the URL to read (retrieve) documents attached to content records in the production environment.

- Select **Next** to continue

The installation program displays the Information Manager Web Services installation option screen.

Installing Information Manager Web Services

Specify whether to install the Information Manager Web Services component, which support adding and modifying content, content categories, and user information from external applications. The installation program selects Yes, to install Information Manager Web Services by default.
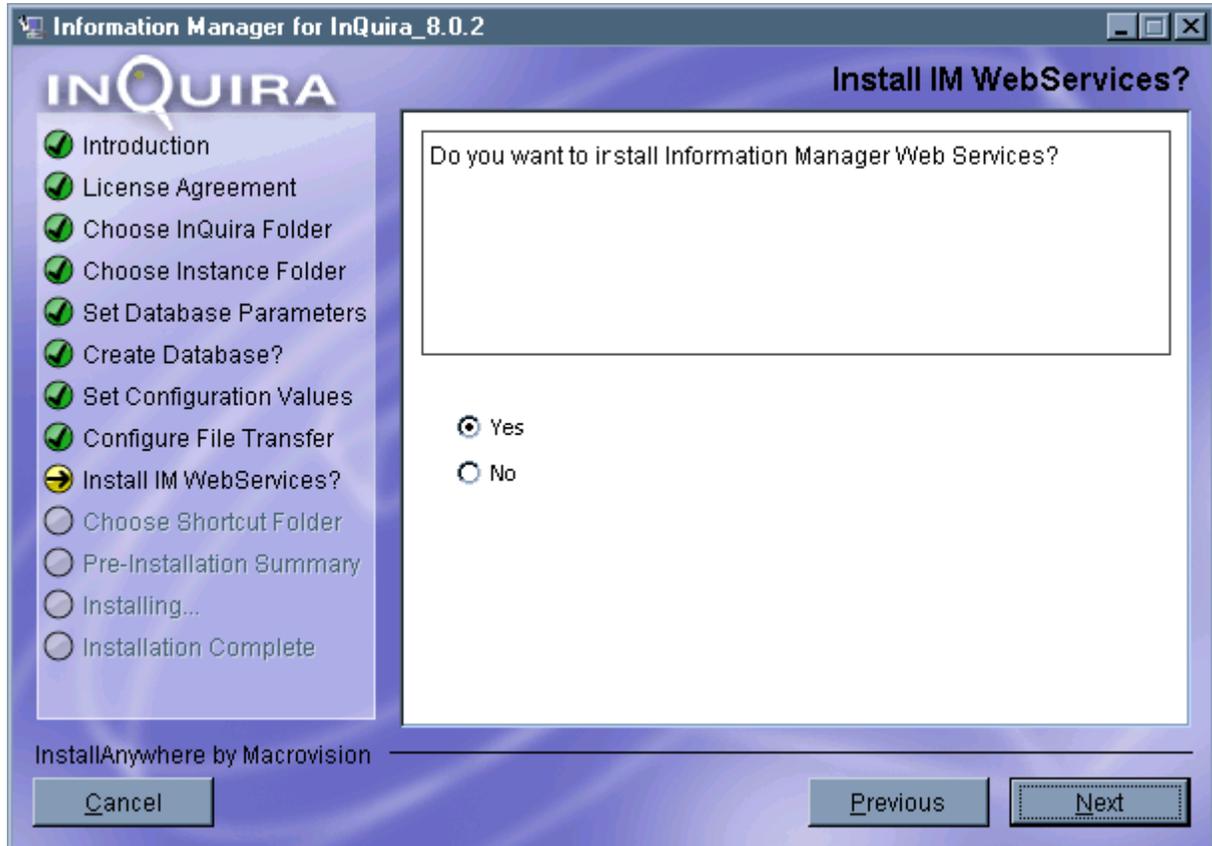
- Select the desired option
- Select **Next** to continue

The installation program displays the shortcut creation options screen.

Selecting Shortcut Options

Select the location in which you want to create shortcuts or links to InQuira 8.1. If the installation program locates an existing InQuira Program Group in Windows environments, it will use that group as the default. If the installation program does not locate an existing InQuira Program Group, it will create a new Program Group.

In Windows environments, you can specify:

- An alternate new Program Group

- An alternate existing Program Group

- To place InQuira 8.1 icons in the Start Menu and on the Desktop, for the current user or for all users

- To create InQuira 8.1 icons in another location

- To create no InQuira 8.1 icons

- To create icons for All Users

In Solaris and Linux environments, you can specify:

- To create links in the current user's home directory

- To create links in another directory

- To create no links
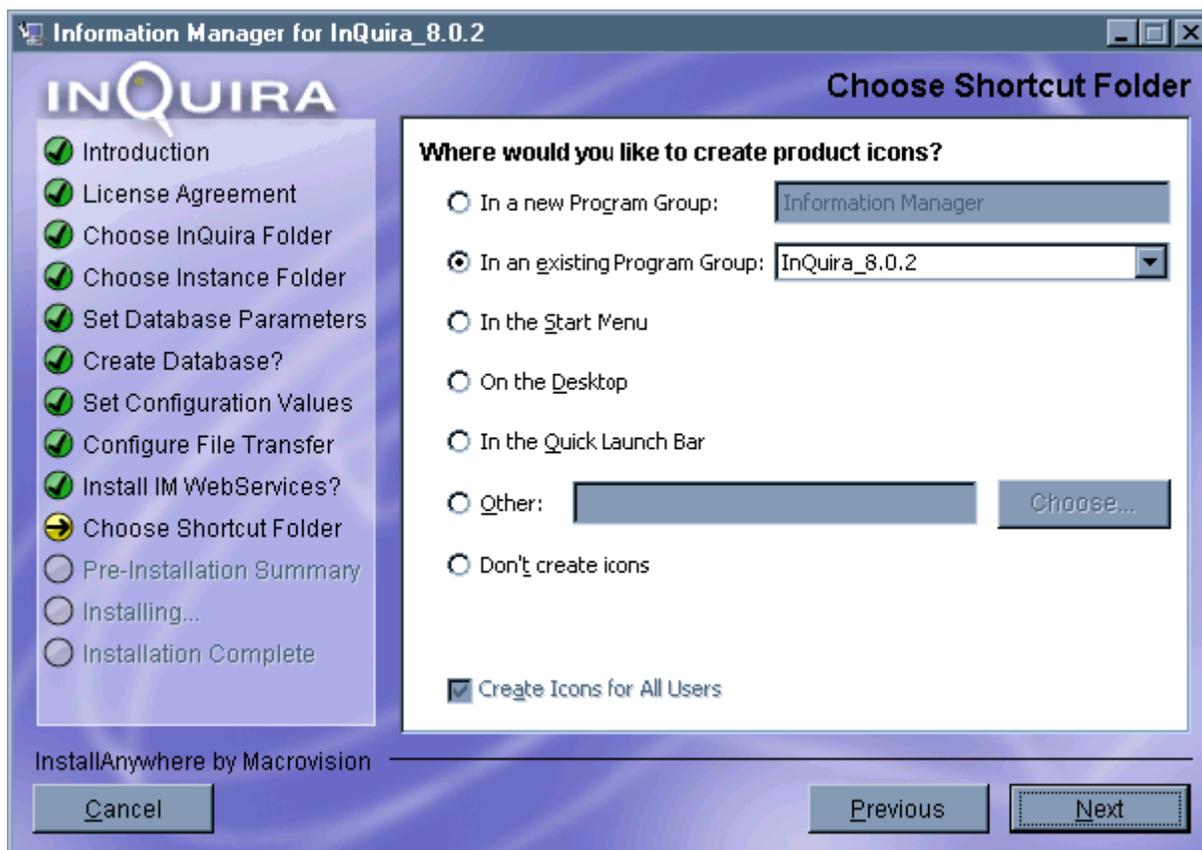
- Select the desired product icon locations

- Select **Next** to continue

The installation program displays the pre-installation summary screen.

Reviewing Installation Values

The pre-installation summary screen displays a summary of your installation selections, as well as disk space information, prior to transferring the product files from the distribution.
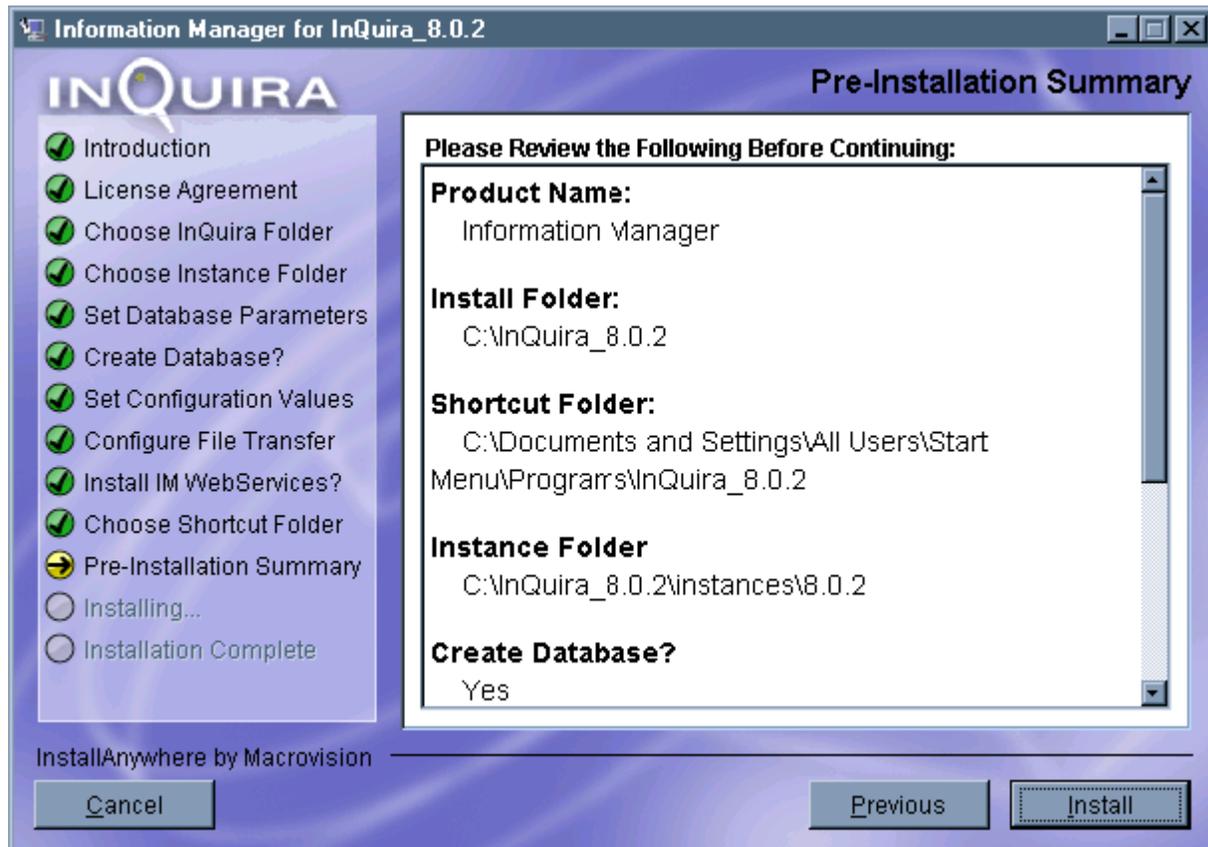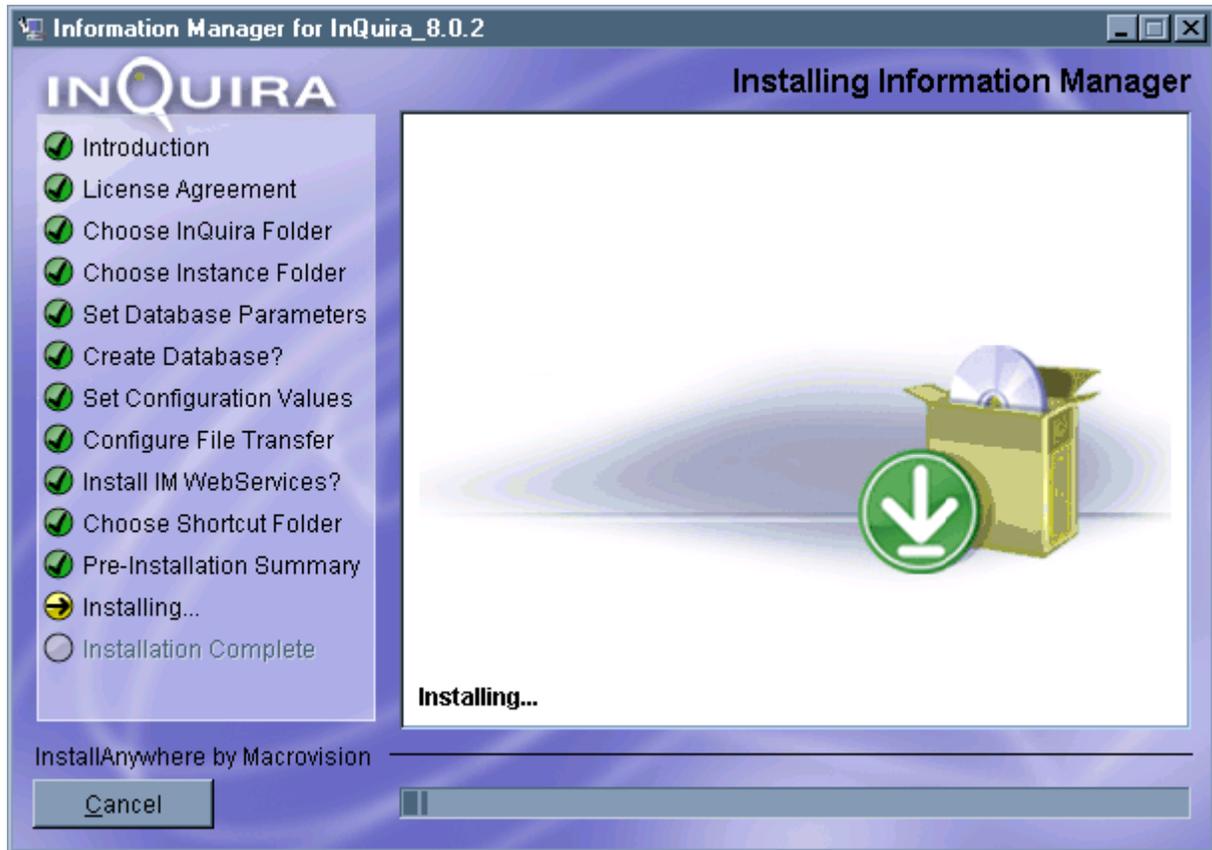

- Review your selections
- Use the **Previous** option to make any corrections
- Select **Install** to continue

The installation program begins installing Information Manager in the specified location.

Installing the Information Manager Files

The installation program displays a progress screen during installation:

When installation is complete, the installation program displays the configuration screen.

Configuring the Information Manager Components

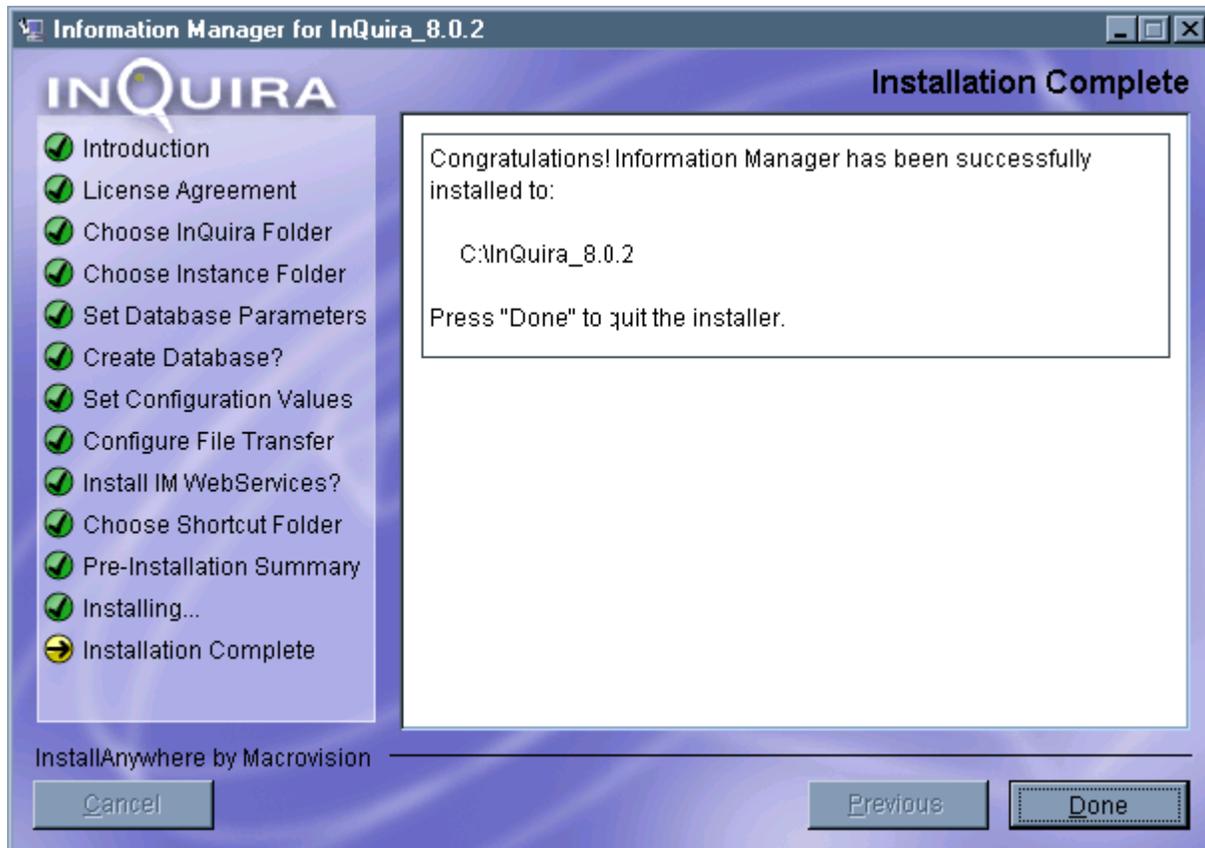The installation program displays a progress dialog as it configures the Information Manager components.

When the configuration process completes, the installation program displays the installation completion screen.

Completing the Installation

The completion screen summarizes the installation process.

The Information Manager component directories and files are now installed in the specified location.

- Select **Done** to exit the installation program

The installation program executes its cleanup routines and terminates.

In Microsoft Windows environments, you can now access the Management Console to begin working with the application as described in *Chapter 3, Configuring a Web Application*.

In Linux and Solaris environments, you must first start the Information Manager service as described in *Starting the Information Manager Service on Linux and Solaris Systems on page 47*.

Starting the Information Manager Service on Linux and Solaris Systems

In Linux and Solaris environments, you must manually start the Information Manager service by:

- Setting the Installation Configuration Environment
- Executing the command to start the service

from the instance in which you installed Information Manager.

NOTE: In Microsoft Windows environments, the installation and configuration process starts the service automatically.

To manually start the Information Manager service:

- Change directories to the InQuira 8.1 instance in which you installed Information Manager:

    cd <inquira_root>/instances/<instance_name>

- Set the Installation Configuration Environment by executing:

    ./setenv.sh

The Installation Configuration Environment environment starts in a command shell.

- Start the Information Manager service by executing:

    inquiraim.sh start

The Information Manager service starts. You can now access the Management Console application as described in *Accessing the Management Console on page 50*.

Information Manager Installation Guide

Chapter 3   Configuring a Web Application

This section describes the general process of configuring an Information Manager application. You configure an Information Manager application by:

- defining an application repository as described in *Accessing the Management Console* on page 50 and *Specifying Repository Properties* on page 51.

- registering a web application as described in *Registering a Web Application* on page 54.

After this initial configuration, you can continue defining the various elements of your content management application using the Management Console and Information Center as described in the *Information Manager Administration Guide*.

Accessing the Management Console

The installation process automatically configures the Management Console for use. You can begin working with Information Manager by accessing the Management Console.

You can access the Management Console using the installed shortcut. The default shortcut location is **All Programs > InQuira_8.1 > Information Manager**:

You can also access the Management Console at the following URL:

```
http://<host_name>:<port>/InfoManager/WebObjects/InfoManager.woa
```

IMPORTANT: The first time you access the Management Console to connect to a new database, it automatically bypasses the logon process and displays the Create Repository page, which requires you to define an application repository as described in *Specifying Repository Properties* on page 51.

IMPORTANT: If the Management Console fails to display the Create Repository page, and instead prompts you to specify database connection information, you will also need to restart the Information Manager service as described in *Managing the Information Manager Application from Installation Configuration Environment* on page 57.

Specifying Repository Properties

You create a repository by specifying the following properties:

NOTE: If you are creating a repository as part of the initial Information Manager configuration, you may find it convenient to complete only the required fields, then specify additional properties as needed.

Property	Description
Repository Name	Specify a name for the repository.
Reference Key	Accept the default value supplied by the Management Console or specify a string to use as an internal identifier. See A Note On Reference Keys in the *Information Manager Administration Guide* for more information on reference keys and how they are used in Information Manager.
Task ID Prefix	Enter a value (character string) to be used to preface task IDs in the inbox. This prefix is used only for consistency for document IDs in the channel and has no other system meaning.
Filter tasks so users are only made aware of tasks matching their skill category	Specify whether to filter tasks based on the presence of category expertise information specified in user profiles. See Specifying Management Console User Properties in the *Information Manager Administration Guide*.
Require at least one matching skill category from every top-level category branch	Specify whether a task should be assigned to a user based on their skills. NOTE: If there are two branches (for example, "Products" and "Departments"), the user must have a user skill in both branches for the task to be assigned to them.
Default Locale	Specify the locale (language) that will be used as the default. The default locale is considered to be the base language for the repository. See Managing Information Manager Applications in Multiple Languages in the *Information Manager Administration Guide* for more information.
Supported Locales	Specify optional supported locales for the repository. The default list of supported locales is defined in the System repository. You can modify the list of supported locales using the Locale Management facility as described in Managing Supported Locales in the *Information Manager Administration Guide*.

Default Administrator	Define a default administrator for this repository. The Information Manager will add this user as a console user having the pre-defined Default Administrator security role. See Information Manager Users in the *Information Manager Administration Guide* for more information on users and security roles.
Workflow Tasks	Specify whether to auto-assign tasks based on workflow attributes to help manage the task list and prevent tasks from being left unassigned.
Translation Tasks	Specify whether to auto-assign tasks based on the previous translator of the record for the task for any new changes or modifications to the master document.
Self Administration	Check these options to allow console users to join work teams, change their own skills (categories), and change the locales they can translate records for. This would normally be managed by the repository administrator.

- Select **Save Repository Properties**

The Management Console displays the new repository on the Manage Repositories page.

If you are configuring your initial application repository, you can now register a web application as described in *Registering a Web Application* on page 54.
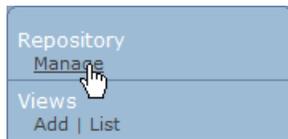
Registering a Web Application

You register a web application using the Web Application Management page of the Repository management area. Use the configuration examples in this section to register and deploy the Information Center sample application.

To register a web application:

- select the **Manage** option under Repository

- select the **Web Application** option in the Properties area

The Management Console displays the Web Application Management page.

- select the **Register new web application** option

The Management Console displays the Web Application Properties page.

- specify the following parameters:

URL To Container	specify the host name and port for the servlet container, for example: `http://<hostname>:<port>` The default is port `8226`.
Context	specify the context, which is the directory in which the application server pages execute. In many cases, you can specify the repository directory, which is named after the repository reference key.

Webapps Directory:	specify the location of the webapps directory by navigating up to the instances directory, then selecting, in succession:
	• the appropriate instance directory
	• the appserver directory
	• the webapps directory
	For example:
	<IM_home>/<instance_name>/appserverim/webapps

To deploy the Information Center on the local processor, specify:

URL To Container	`http://<hostname>:<port>`
Context	`<REPOSITORY_REFERENCE_KEY>`
Webapps Directory:	`<IM_home>/<instance_name>/appserverim/` `webapps`

If you are configuring the Information Center, configure the graphics and formatting resources, as described in *Configuring Information Center Graphics and Formatting* on page 55.

IMPORTANT: You must restart the Information Manager service as described in *Restart the Information Manager Service* on page 56 to make the application configuration changes effective in the deployed web application.

Configuring Information Center Graphics and Formatting

You must configure the graphics and formatting resources used by the Information Center web application. To configure the graphics and formatting for the Information Center web application:

• select the **Tools** tab in the Management Console navigation area

The Information Manager displays the Administration page

• select the **Configure** option under **System**

The Information Manager displays the Information Manager Settings page.

• select the **Resource Configuration** item

The Information Manager displays the Information Manager Settings page.

- select the **Override Default Configuration** option

- enter the following path in the Static Resource URL field:

  apps/infocenter/resources

- select the **Save Resource Configuration** option

IMPORTANT: You must restart the Information Manager service as described in *Restart the Information Manager Service* to make the application configuration changes effective in the deployed web application.

# Restart the Information Manager Service

You must restart the Information Manager service to apply your configuration changes to the Information Manager web applications.

When you install and configure InQuira 8.1 and Information Manager, the installation program places Installation Configuration Environment items in the Microsoft Windows Start menu for each defined instance.

To restart the Information Manager service:

- Select the Installation Configuration Environment item for the desired instance:

  Start => Programs => InQuira 8.1 => <application_name> development=>Indexing Environments => <application_name> Environment
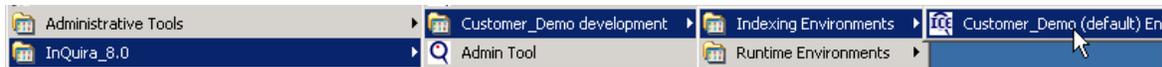
- Enter the following command from the Installation Configuration Environment prompt:

  inquiraim restart

Information Manager Installation Guide

Accessing the Information Center

You can now access the Information Center web application by opening the appropriate URL in a web browser, for example:

```
http://<hostname>:<port>/<context>/index?page=sample
```

where:

`<hostname>`,`<port>`, and `<context>` correspond the values specified in *Registering a Web Application* on page 54. See the *Information Manager Administration Guide* for more information on working with Information Center.

Managing the Information Manager Application from Installation Configuration Environment

You can manage the Information Manager application using the following Installation Configuration Environment commands. You can access the Information Manager Environment from an Installation Configuration Environment shortcut that is installed as part of the standard and stand-alone installation processes

Command	Description
inquiraim start	starts the Information Manager services
inquiraim stop	stops the Information Manager services
inquiraim restart	stops and restarts the Information Manager services

Chapter 4   Uninstall Information Manager

Information Manager provides an uninstall program. This section will describe the uninstall procedure.
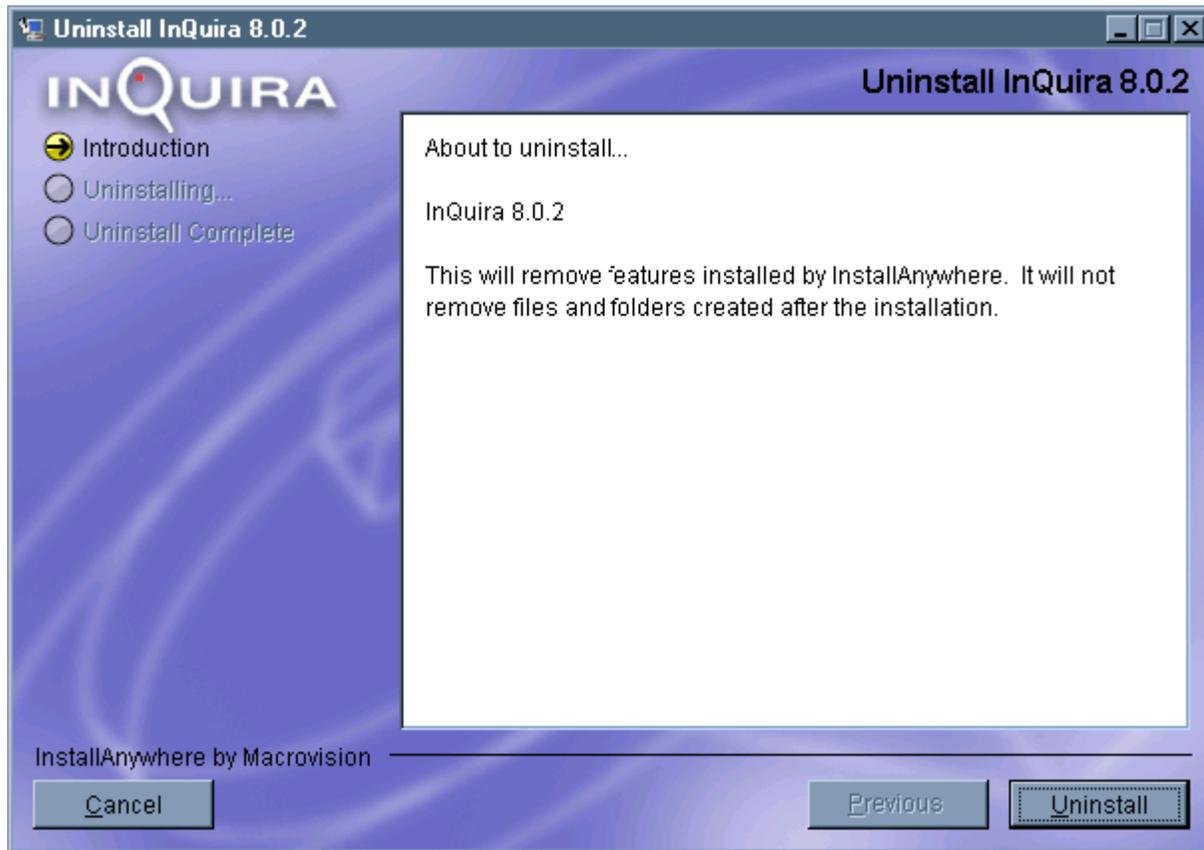
Executing Uninstall

To uninstall Intelligent Search:

- Locate the UninstallerData folder.

    This folder is located in <InQuira 8.1_home>>/Uninstall_Information_Manager.

- Execute Uninstall_Information_Manager.exe.
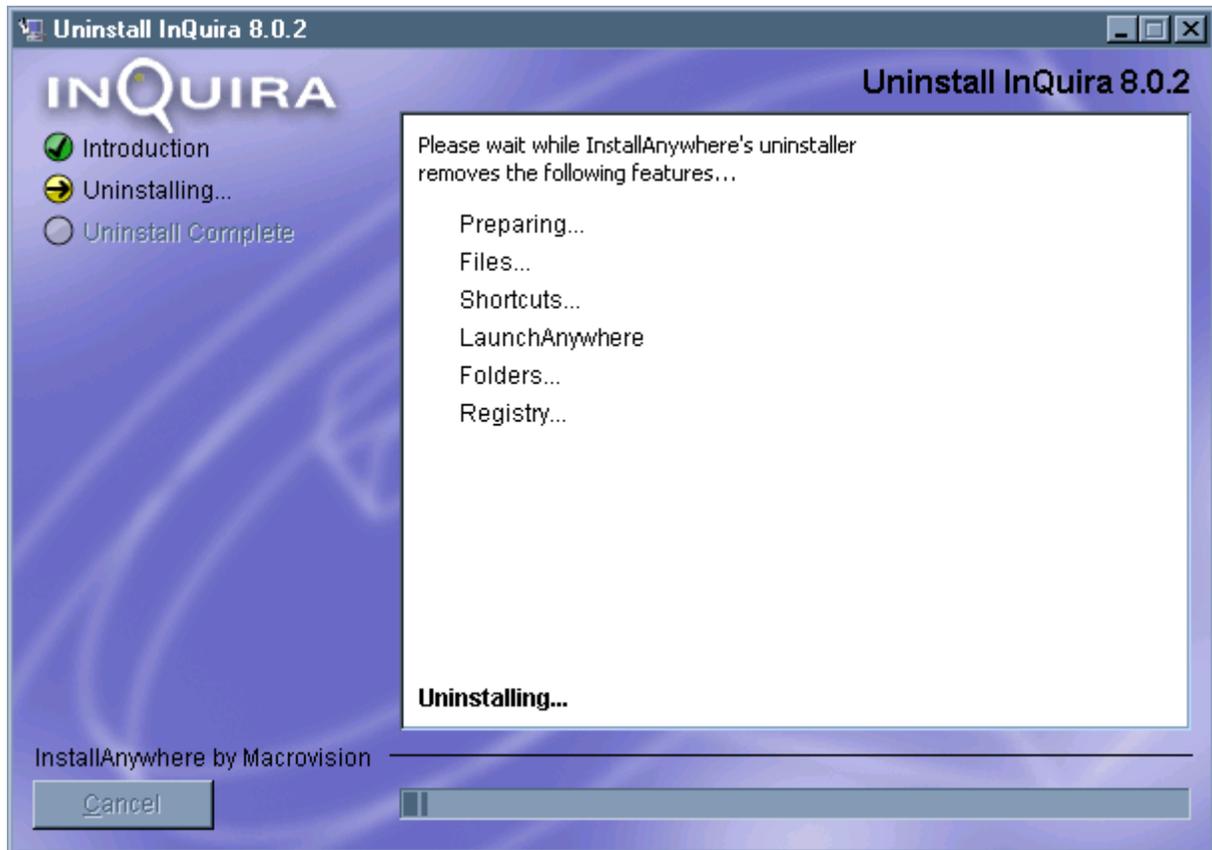
The Uninstall InQuira 8.1 screen displays.

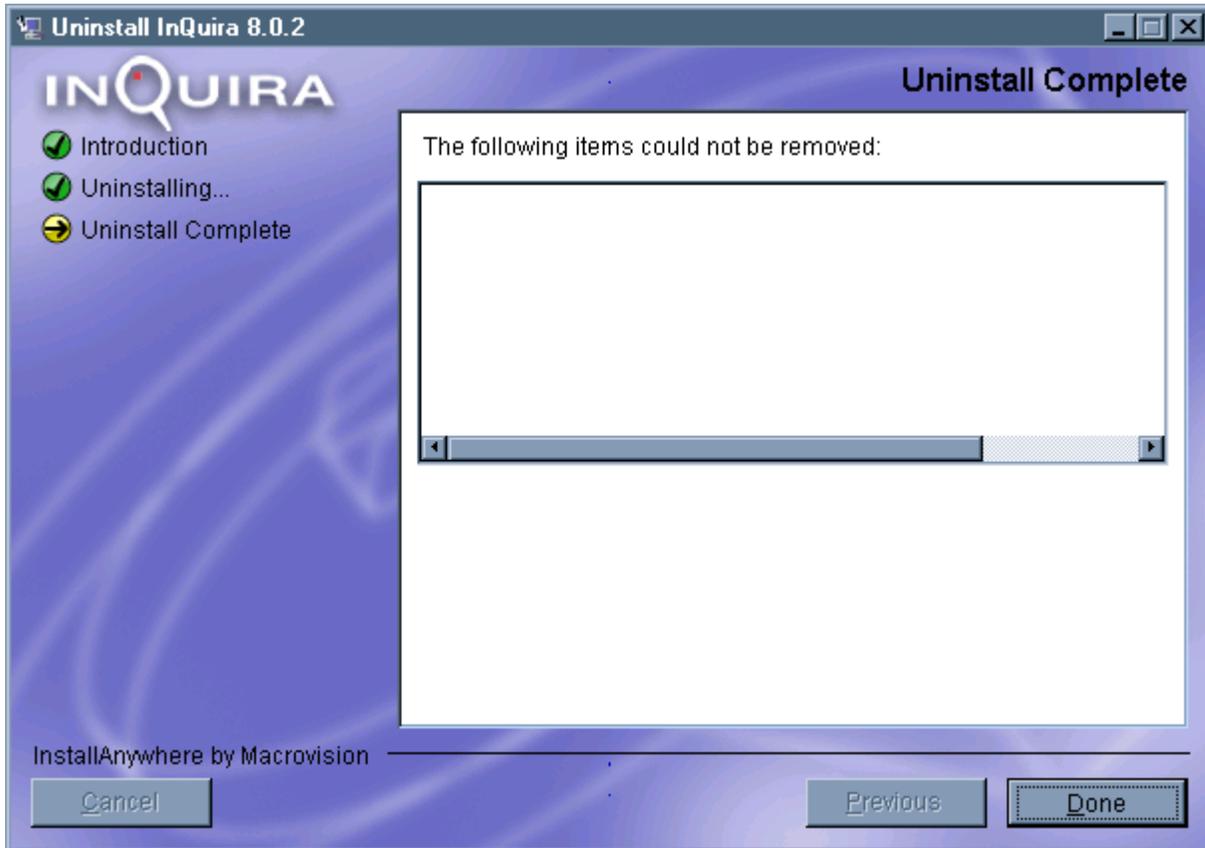
- Select **Uninstall**.

Uninstall Intelligent Search

The uninstall process begins:

Uninstall Complete

The Uninstall Complete screen displays.

Some items may not be removed as a part of the uninstallation process. These items will appear in the The following items could not be removed field, and they will have to be removed manually.

- Select **Done**.