# Oracle Knowledge Information Manager Installation Guide

*Installing and Configuring Oracle Knowledge Information Manager*

Oracle Knowledge Version 8.4.2.2
Document Number M84-IG-22
November 14, 2011

**Oracle, Inc.**

## COPYRIGHT INFORMATION

Copyright © 2002, 2011, Oracle and/or its affiliates. All rights reserved.

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, the following notice is applicable:

U.S. GOVERNMENT RIGHTS

Programs, software, databases, and related documentation and technical data delivered to U.S. Government customers are "commercial computer software" or "commercial technical data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, duplication, disclosure, modification, and adaptation shall be subject to the restrictions and license terms set forth in the applicable Government contract, and, to the extent applicable by the terms of the Government contract, the additional rights set forth in FAR 52.227-19, Commercial Computer Software License (December 2007). Oracle America, Inc., 500 Oracle Parkway, Redwood City, CA 94065.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Xeon are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Opteron, the AMD logo, and the AMD Opteron logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group. Other names may be trademarks of their respective owners.

This software or hardware and documentation may provide access to or information on content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services.
Other patents pending.Patents 7,668,850, 7,672,951, 7,747,601. Other patents pending.

# Contents

**Preface About This Guide . . . . . 1**

In This Guide . . . . . 1
Screen and Text Representations . . . . . 1
References to World Wide Web Resources . . . . . 1

**Chapter 1 Installation Overview . . . . . 2**

The Information Manager Product Distribution . . . . . 2
The Installation Configuration Environment . . . . . 3
Information Manager System Requirements and Dependencies . . . . . 4
Supported Databases . . . . . 4
Database Properties . . . . . 4
Oracle . . . . . 4
Microsoft SQL Server . . . . . 4
Java Virtual Machine (JVM) Allocation Requirements . . . . . 5
UNIX grep, rm, tail, and wget Utilities . . . . . 5
Information Manager Application Components . . . . . 6
Installation Modes . . . . . 7
Information Manager Application Configurations . . . . . 8
Single Server Installation . . . . . 8
Multiple Server Installation . . . . . 8
Clustered Installation . . . . . 9

**Chapter 2 Installing and Configuring Information Manager . . . . . 11**

The Installation Process . . . . . 12
Starting the Installation Program . . . . . 12
The Information Manager Installation Introduction . . . . . 14
Selecting the Installation Location . . . . . 14
Selecting the Instance Folder . . . . . 15
Specifying the Information Manager Database Type . . . . . 17
Specifying Database Connection Properties . . . . . 19
Specifying Database Table Creation . . . . . 19
Configuring Email and Server Properties . . . . . 20

Specifying the File Transfer for Content Resource Files . . . . . 21
Configuring an FTP Server Content Resource Store . . . . . 23
Configuring File Transfer (FTP) Parameters . . . . . 24
Specifying an FTP Staging Server . . . . . 25
Configuring the FTP Staging Server . . . . . 26
Configuring a Local File System Content Resource Store . . . . . 27
Configuring the Content Resource URL . . . . . 28
Installing Information Manager Web Services . . . . . 28
Selecting Shortcut Options . . . . . 29
Reviewing Installation Values . . . . . 31
Installing the Information Manager Files . . . . . 32
Configuring the Information Manager Components . . . . . 32
Completing the Installation . . . . . 33
Starting the Information Manager Service on Linux Systems . . . . . 34

**Chapter 3 Configuring a Web Application . . . . . 35**

Accessing the Management Console . . . . . 35
Specifying Repository Properties . . . . . 36
Registering a Web Application . . . . . 38
Define appTypes . . . . . 38
Register a Web Application . . . . . 39
Configuring Information Center Graphics and Formatting . . . . . 41
Restarting the Information Manager Service . . . . . 41
Accessing the Information Center . . . . . 42
Managing the Information Manager Application from Installation Configuration Environment 43

**Chapter 4 Uninstall Information Manager . . . . . 44**

Executing Uninstall . . . . . 44
Uninstall Information Manager . . . . . 46
Uninstall Complete . . . . . 47

# About This Guide

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

This preface includes information on:

- **In This Guide** - The general organization of this guide.
- **Screen and Text Representations**
- **References to World Wide Web Resources**

## 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. |

## 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 chapter 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.

**NOTE:** This guide provides the installation process for Oracle Knowledge. For upgrades, see *Upgrading Oracle Knowledge*.

**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 Oracle 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 Linux | `install_im.bin` |
| Information Manager for Microsoft Windows (stand alone installation) | `install_im_sa.exe` |
| Information Manager for Linux (stand alone installation) | `install_im_sa.bin` |

# The Installation Configuration Environment

The Installation Configuration Environment is a common operational environment for Oracle Knowledge 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 Oracle Knowledge 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 Oracle Knowledge 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 Oracle Knowledge product code
- Support for a central Dictionary repository, shared by all applications
- Separate and standard locations for Oracle Knowledge product code and custom code
- Simplified integration and configuration of custom code that uses Oracle Knowledge 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 Oracle Knowledge product.

See the *Intelligent Search Installation Guide* for complete Oracle Knowledge 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 4 for information on database requirements, dependencies, and recommended settings.

See “Java Virtual Machine (JVM) Allocation Requirements” on page 5 for information on recommended JVM parameters.

See “UNIX grep, rm, tail, and wget Utilities” on page 5 for information on acquiring and installing recommended UNIX utilities.

## Supported Databases

Information Manager requires a JDBC-compatible database for content and metadata storage.

**NOTE:** See *Oracle Knowledge Platform and Language Requirements* for complete information on supported platforms and databases. The document is available at: `https://documentation.inquira.com`.

### Database Properties

Oracle Knowledge 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 Oracle Knowledge 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. Oracle Customer Support can provide guidelines and advice to help determine appropriate parameters for your specific application and environment. See “Screen and Text Representations” on page 1 for information on contacting Oracle Customer Support.

## UNIX grep, rm, tail, and wget Utilities

In order to use the certain ICE commands, customers that have deployed or plan on deploying on Windows operating systems must install the grep, rm, tail, and wget UNIX utilities prior to installing Oracle Knowledge software. This is for standalone Information Manager installations. If you installed Intelligent Search first, these utilities should have been installed prior to that installtion.

Microsoft provides ports of all of the required Unix utilities as part of their Microsoft Services for Unix (SUA) interoperability service package. These service packages are available at no charge from Microsoft's web site. Here are links to the available pacakges:

- http://www.microsoft.com/download/en/details.aspx?displaylang=en&id=23754 (Win2008, Vista)
- http://technet.microsoft.com/en-us/library/cc771672.aspx (Win 7)
- http://www.microsoft.com/download/en/details.aspx?displaylang=en&id=20983 (Win 2003)

**NOTE:** The location of these files may change over time.

After the SUA package is installed and available on the SYSTEM path, the existing ICE scripts should work normally.

To verify that the Unix utilities were properly installed and available inside the ICE environment, do the following:

1. After installing the Unix utilities open an ICE prompt.
2. Execute one of the commands, such as grep, and see if the command responds as expected:

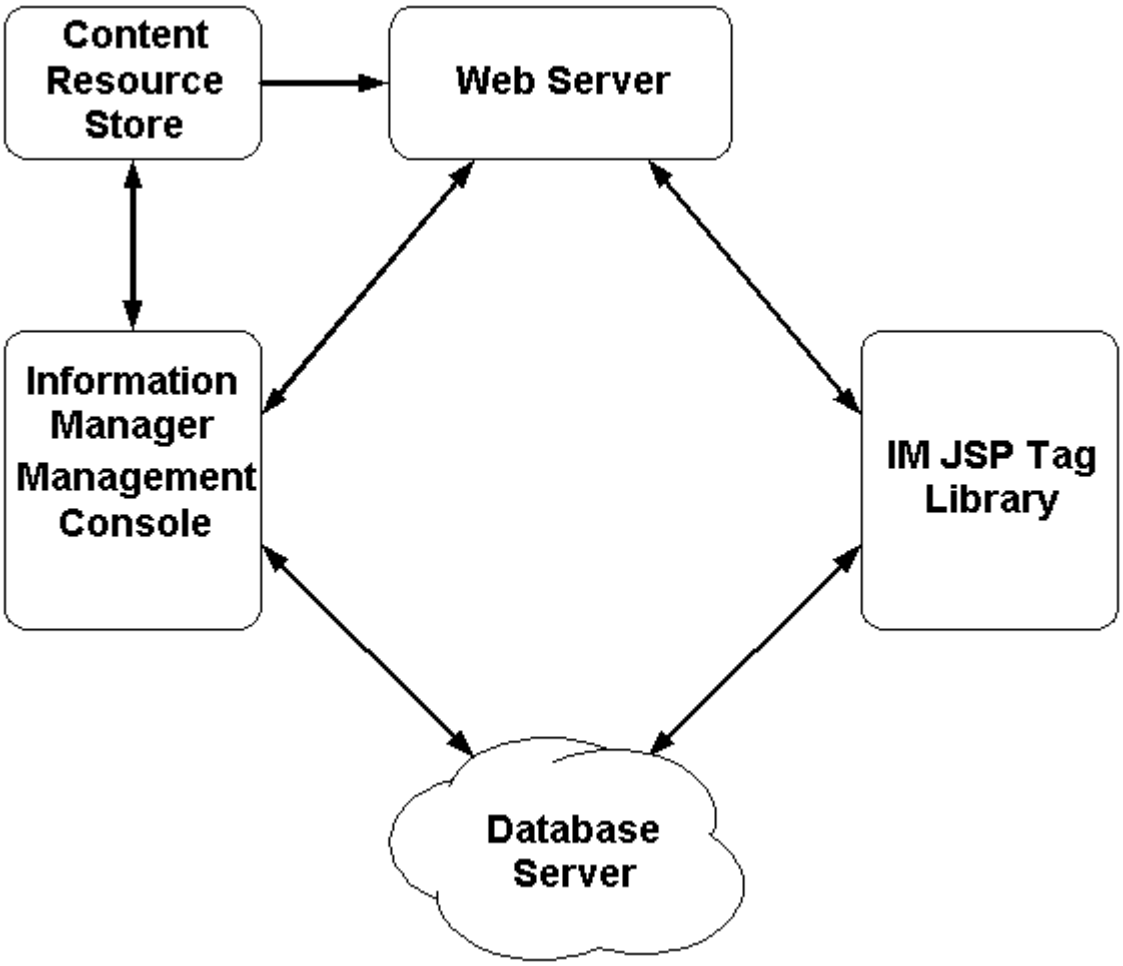
```
c:\InQuira_8.4.1\instances\MyCompany > grep
c:\InQuira_8.4.1\instances\MyCompany > Usage: grep [OPTION]... PATTERN
[FILE]...
```

Try `grep --help' for more information.

# 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 |
|---|---|
| **Information Manager Tag Library Web Applications** | Information Manager uses a J2EE servlet container supporting JSP version 1.2 and higher compatible tag libraries to distribute Information Manager application content. |
| **Web Server** | A web server is used as the primary interface to the Information Manager based web applications. By default, Apache Tomcat is used to serve the application content. It is possible to use third party web servers such as Apache or Internet Information Server (IIS) as the front end and configure the Information Manager requests to be routed to the Apache Tomcat application server. |
| **Information Manager Content Resource Store** | The Information Manager Content Resource Store stores resources (files) that are attached to content records in the application.<br>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.<br>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).<br>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. |
| **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 provides an open set of web services and a native platform API (Java and Microsoft .Net platforms) 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 Oracle Knowledge Intelligent Search installation (Search Scheduler or Search Runtime).
- Stand-alone mode, which installs Information Manager as a stand-alone application, independent of any other Oracle Knowledge application.

See “Information Manager Application Configurations” on page 8 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 8.
- A multiple server environment as described in “Multiple Server Installation” on page 8.
- A clustered server environment as described in “Clustered Installation” on page 9.

## Single Server Installation

The standard installation process using the packaged installation program installs and configures all Information Manager components on a single server. The standard process requires an existing Oracle Knowledge Intelligent Search instance on the target server. The stand alone installation installs all of the necessary components to run Information Manager without requiring a previously installed installation of Oracle Knowledge Intelligent Search.

In a single server environment:

- The Information Manager Content Resource Store is created on the local file system. The default location is:
  `$INQUIRA_ROOT/instances/<instance_name>/appserverim/ROOT/resources`.

  This folder is served by the default Apache Tomcat ROOT web application.
- The Apache Tomcat serves images and accesses the Information Manager application.

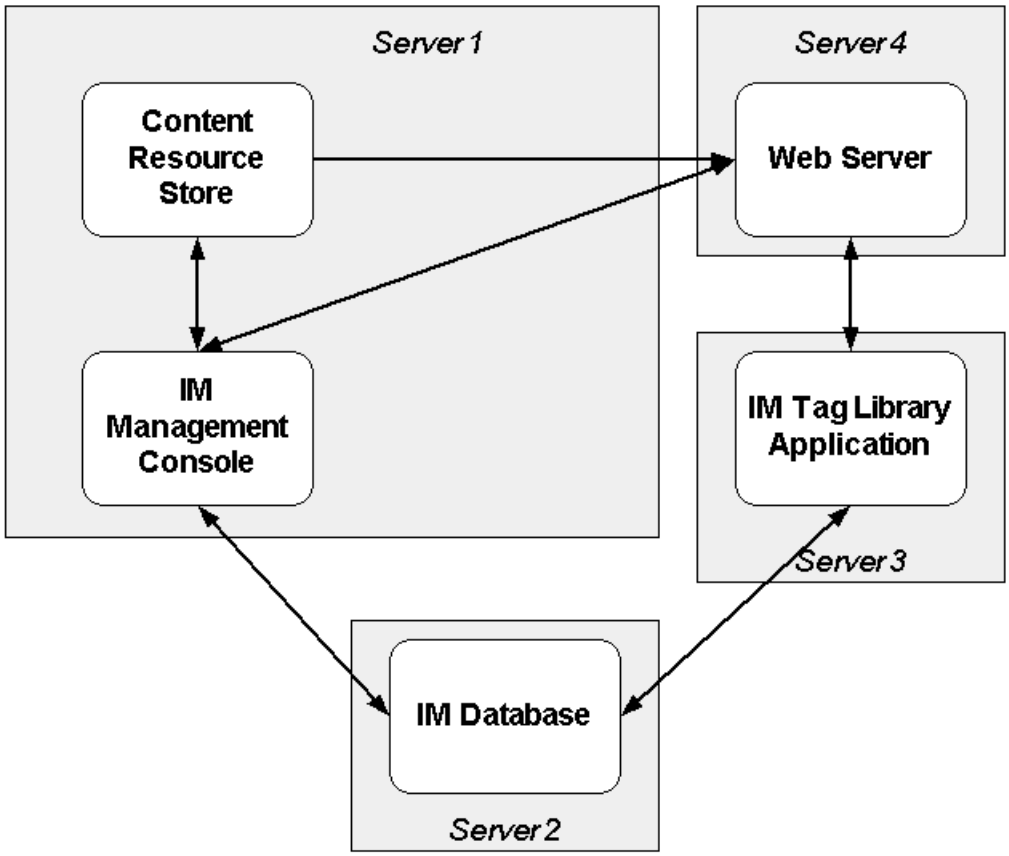
## Multiple Server Installation

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 IM_HOME directory. It is possible to configure the $IM_HOME folder to be stored on a networked shared drive such that is can be shared by multiple servers.

The Management Console and the tag library applications can be located on separate remote servers.

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 server as the Management Console. The file system must be visible to a web server to serve the attached resources. The file system used to store attachments for the Information Manager application must have read/write access

for the Information Manager management console and other Information Manager applications that are used to create or modify content.

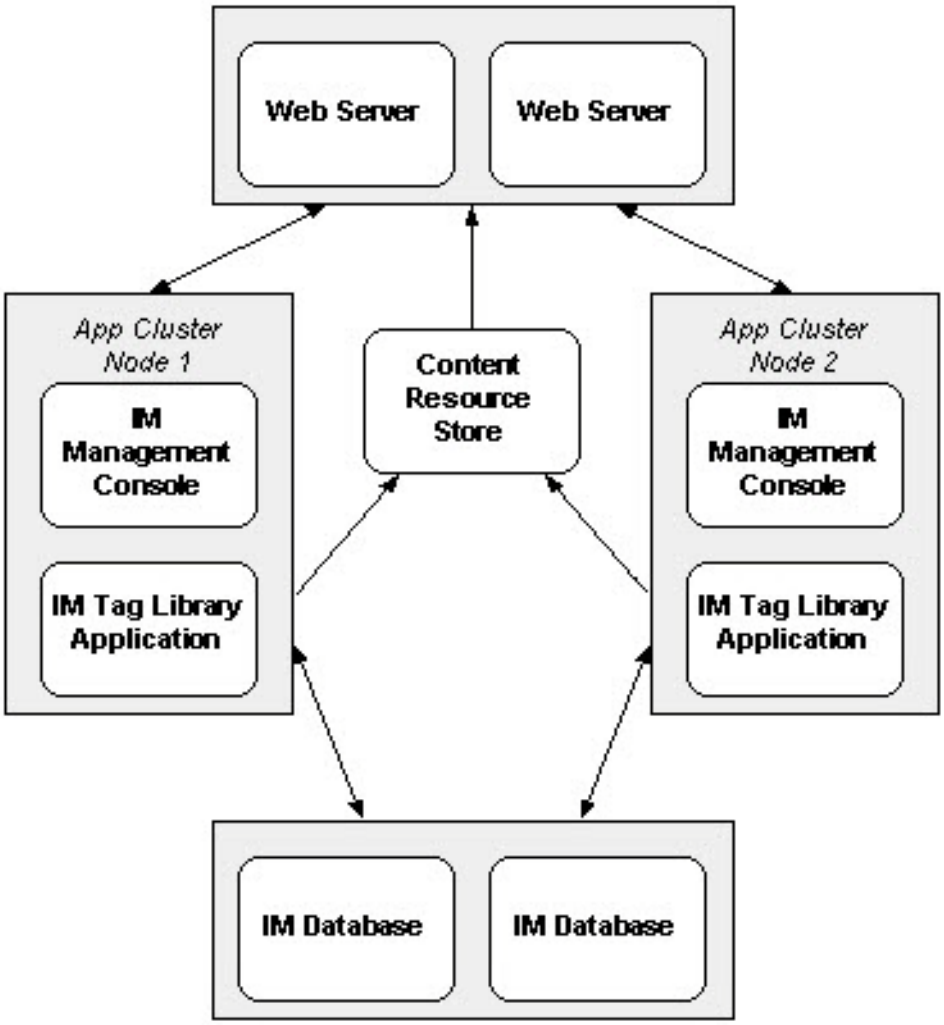



## Clustered Installation

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.

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. Oracle Knowledge recommends 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 Oracle Knowledge application.

**NOTE:** The example path, directory, and file names in this guide follow Microsoft Windows naming conventions. Specific 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 4.

# 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 12.
- Supply the following information to the installation program:
  - The location of the Oracle Knowledge 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

**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`

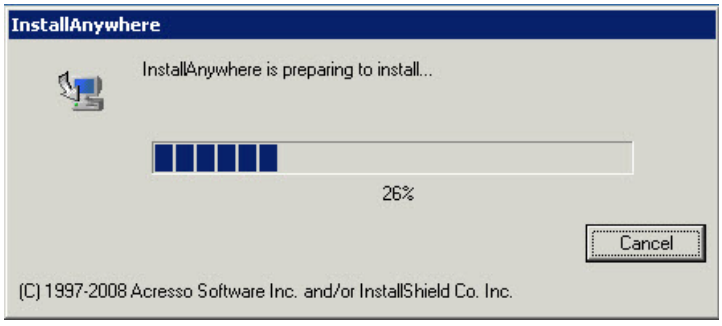
**IMPORTANT:** For Windows 2008, the user must be part of the Administrators group to install and operate Oracle Knowledge products.

To start the installation program in Linux environments:

- Execute `install_im.bin`

**IMPORTANT:** Oracle Knowledge software must be installed using a non-root user. Prior to running the installer, a standard Oracle Knowledge admin (Linux) user should be created in the operating system that will be used to install and run the Oracle Knowledge software. This user should be given permission to access network shares while running as a service.

The installation program starts:

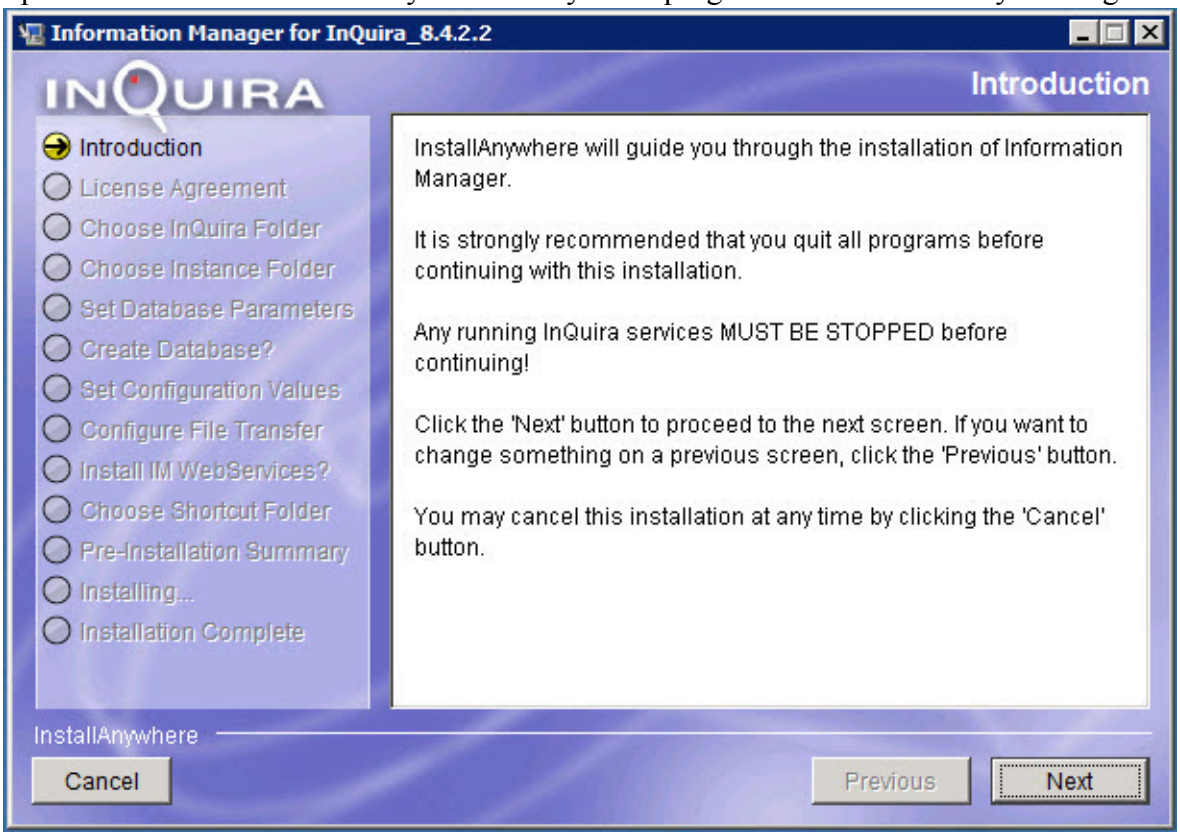



When the initialization progress dialog completes, the installation program displays the introduction screen.

**NOTE:** Application screen shots used in this guide may reflect a different release number than the one being installed. Application screen content is compared for overall accuracy with screen shots in the guide prior to release. Updates are made where necessary.

# 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 installation location selection screen.

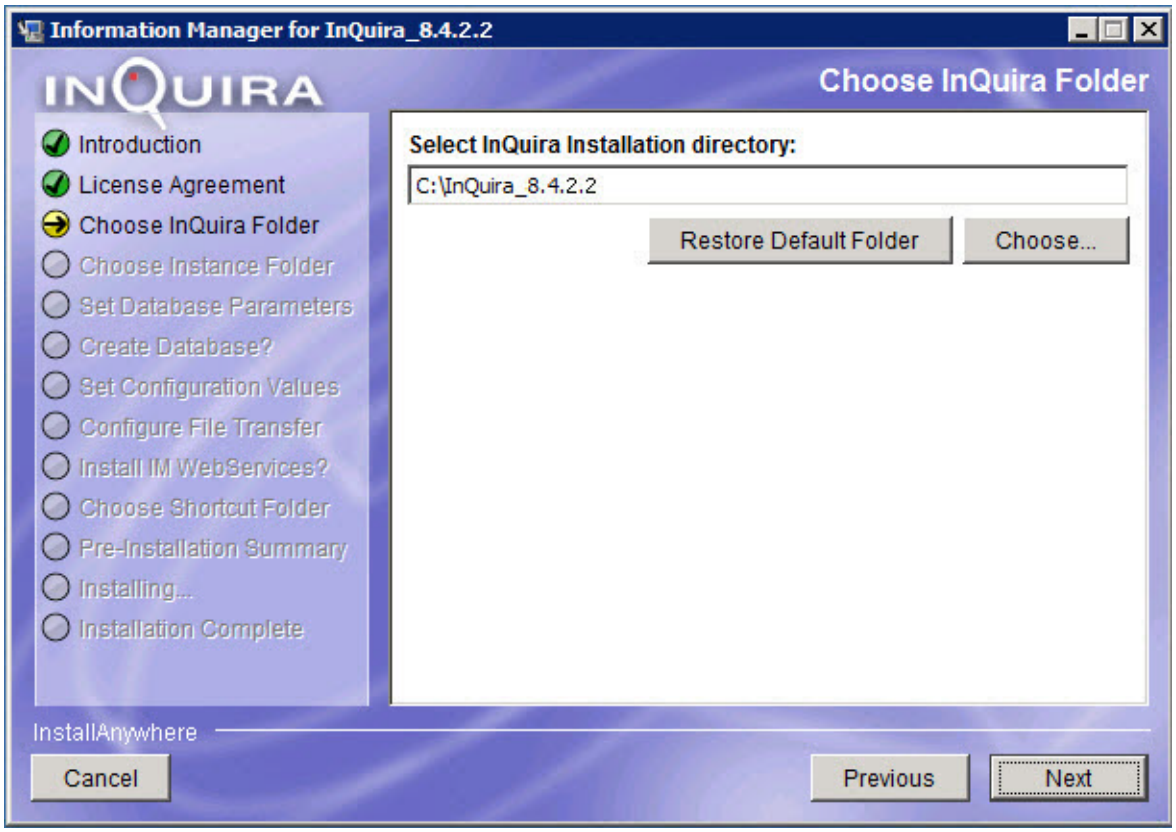
# Selecting the Installation Location

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

The installation program displays the default Oracle Knowledge installation directory:

- `C:\Inquira_[release]` in Windows environments
- `<user_home>/InQuira_[release]` in Linux environments

**IMPORTANT:** For standard installations, you must install Information Manager in the base Oracle Knowledge application directory (for example: `C:\InQuira_[release]`) . For standalone installations, you can install at any location.




- Specify the appropriate directory.

**NOTE:** Click **Choose...** to open a file browser and select an alternate Oracle Knowledge base directory. Use the **Restore Default Folder** option to reset the default installation directory, if necessary.

- Click **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 17.

# Selecting the Instance Folder

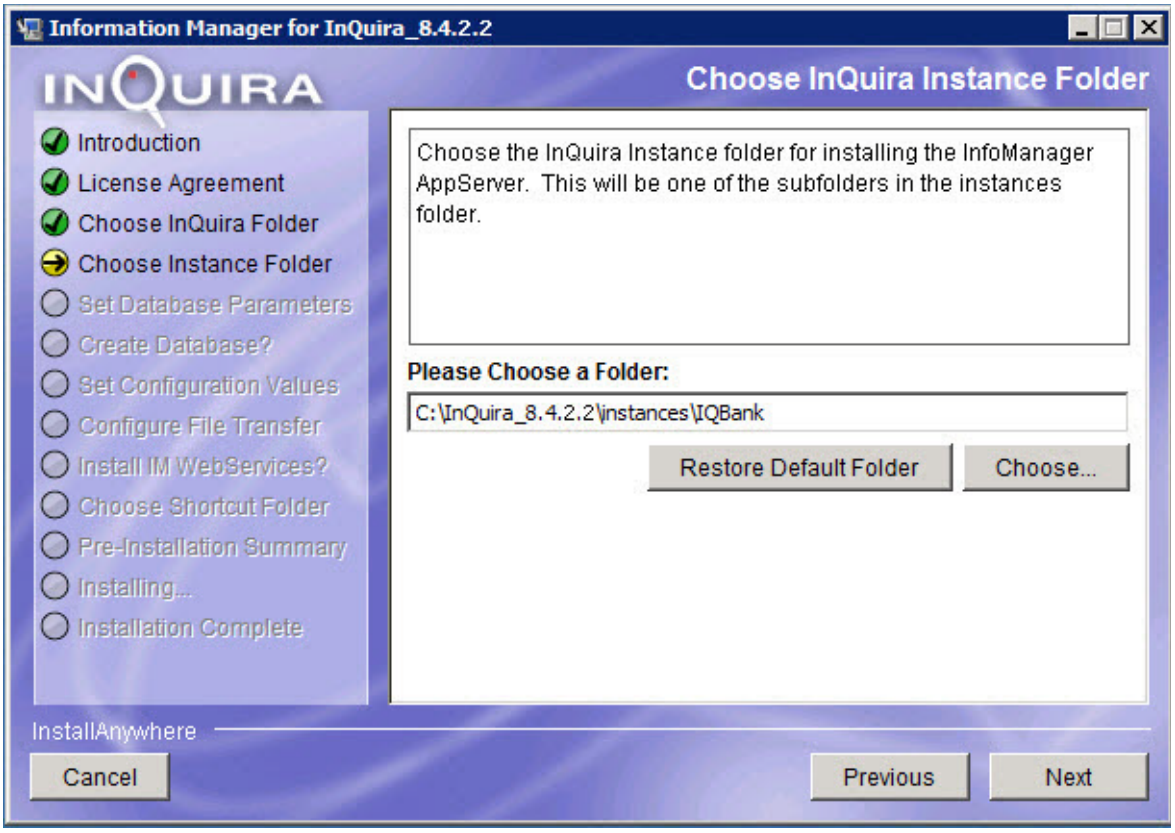
Select the Oracle Knowledge instance folder into which you will install the Information Manager application server.

**NOTE:** This is only applicable for standard installation mode. This step is omitted when you install Information Manager as a standalone application.

Oracle Knowledge 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 `<Oracle Knowledge_base_dir>\instances` directory contains a defined instance. See the “Oracle

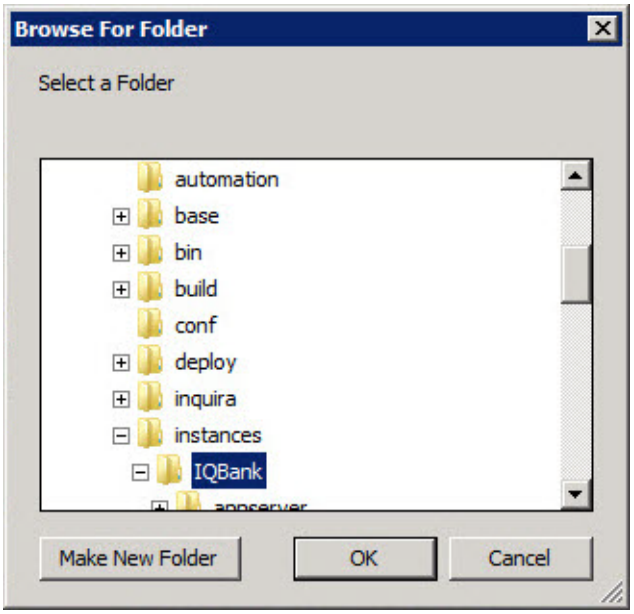
Knowledge Intelligent Search Administration Guide" for more information on supported instances.

**NOTE:** We recommend that you install Information Manager in the content processing instance of the Oracle Knowledge application.




- Click **Choose...** to locate the appropriate instance directory.

The installation program displays a Browse For Folder explorer.



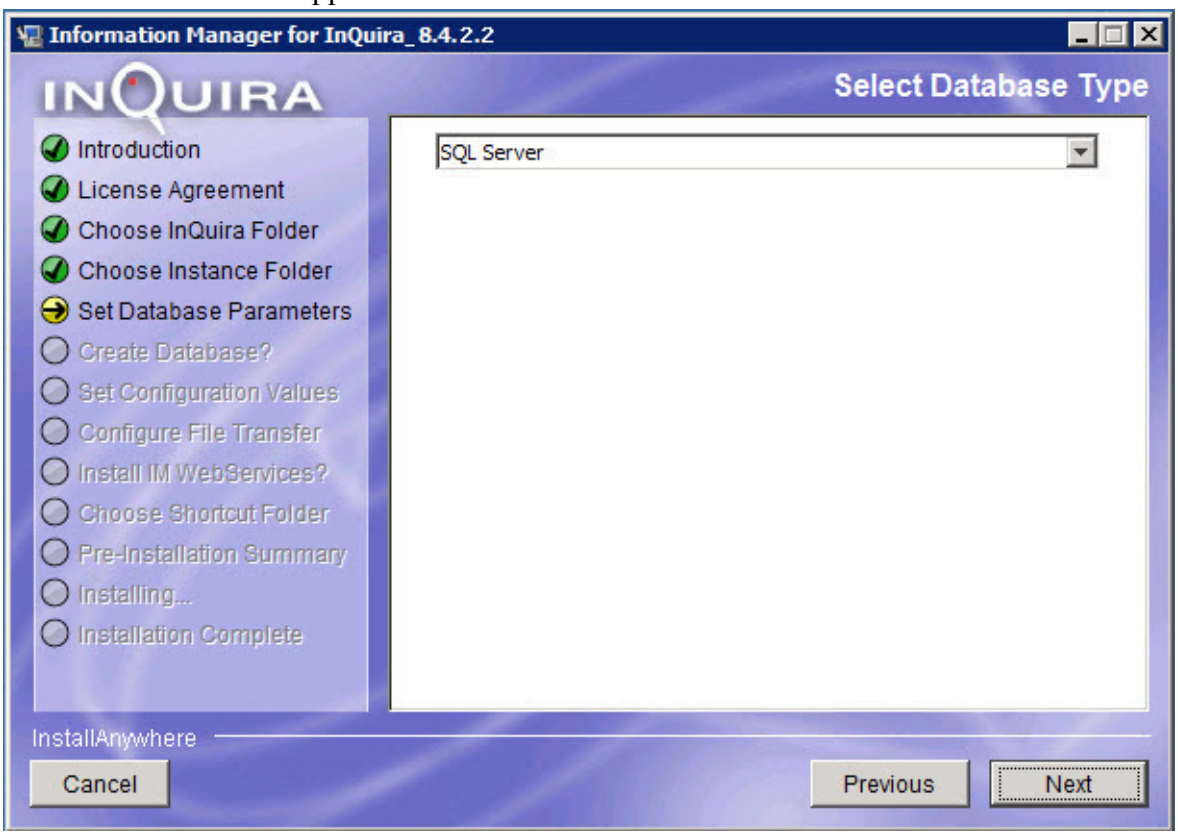

- Locate and select the appropriate directory.
- Click **Next** to continue.

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 4 for

more information on supported databases.

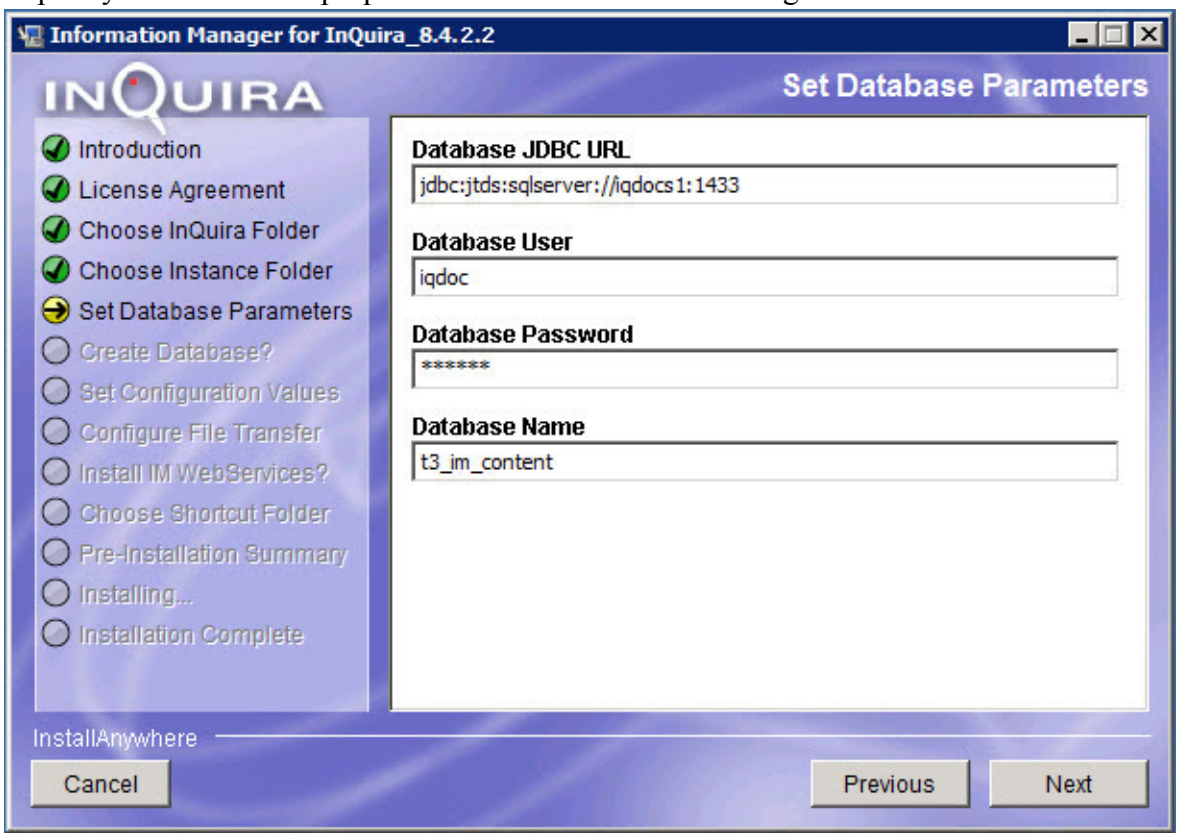



- Select the appropriate database type.
- Click **Next** to continue.

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. |

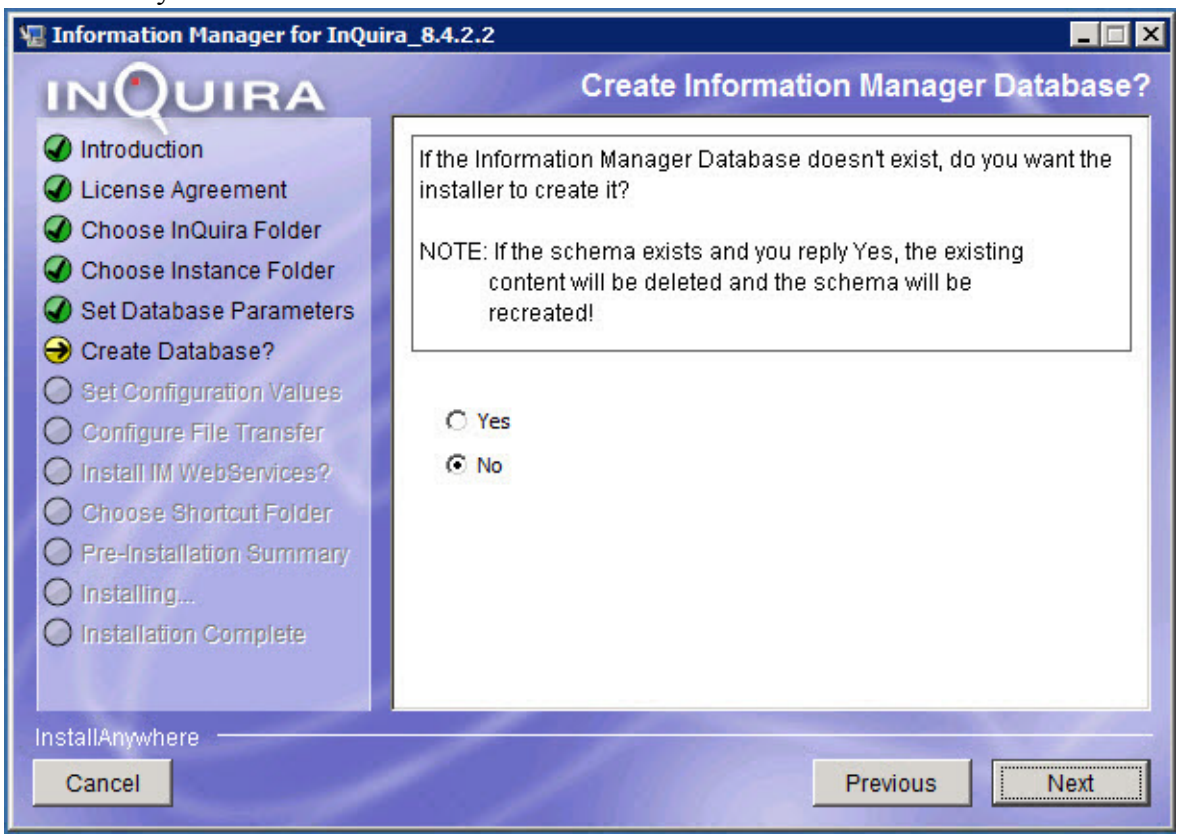
- Click **Next** to continue

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 *"Oracle Knowledge Information Manager Administration Guide"* prior to using the Information Manager. The database connection properties are stored in the `$IM_HOME/config/IMADMIN/application.properties` and `$IM_HOME/config/IMWEBSERVICES/application.properties` after the installation has been completed successfully.



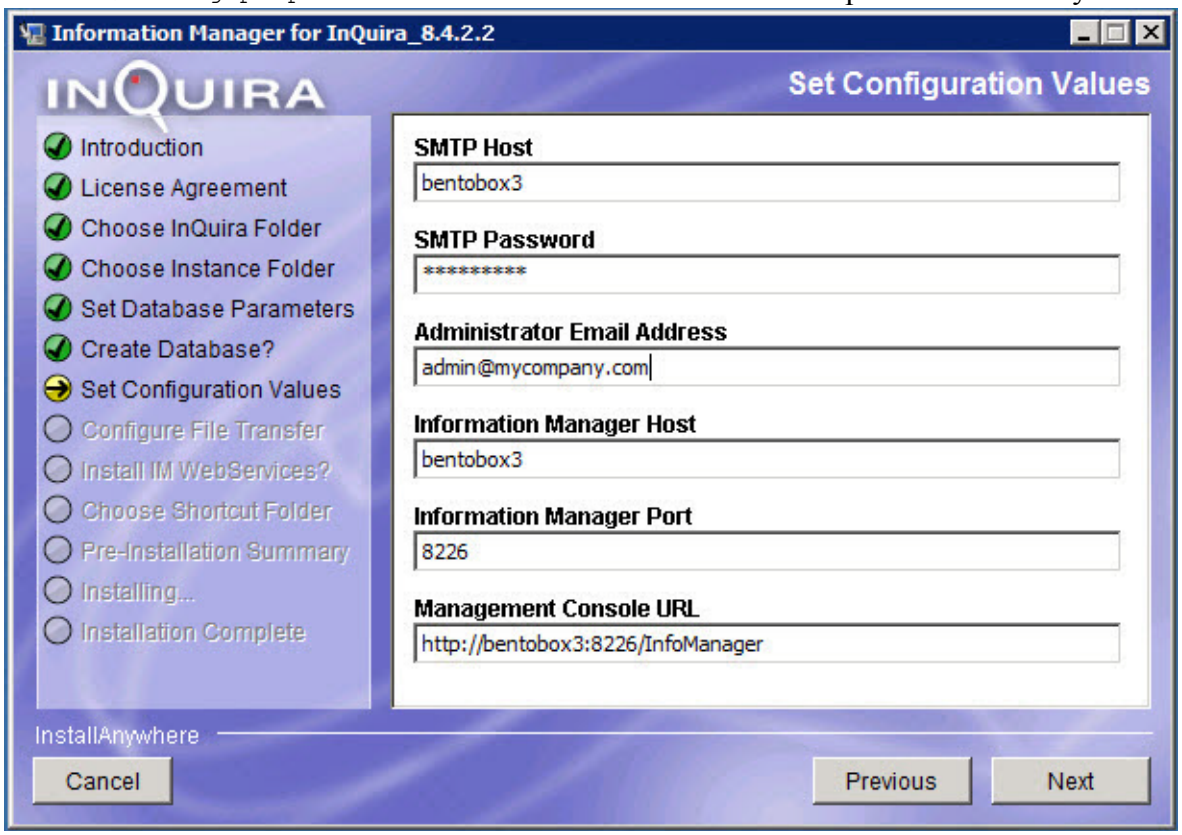

- Select the desired option.
- Click **Next** to continue.

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

# Configuring Email and 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 application

server. The email and server configuration properties are stored in the `$IM_HOME/config/SYSTEM/config.properties` after the installation has been completed successfully.




- Specify the appropriate values for the following email and database parameters:

| Property | Description |
|---|---|
| **SMTP Host / Password** | Specify the hostname and password of email server to use for email-related functions. |
| **Administrator Email Address** | Specify the 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. Default is 8226. |
| **Management Console URL** | Specify the URL for the Management Console. Default is http://<host>:<port>/InfoManager. |

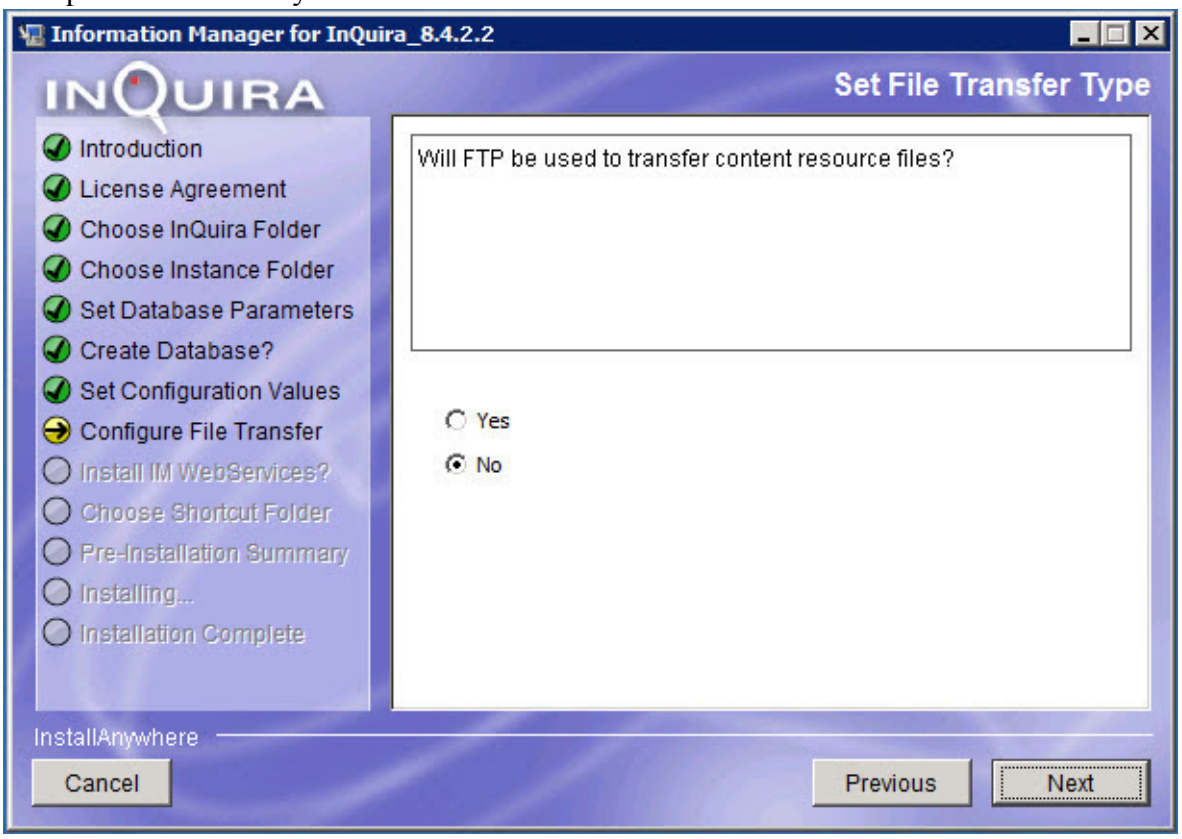
- Click **Next** to continue.

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 resource configuration properties are stored in the `$IM_HOME/config/SYSTEM/config.properties` after the installation has been completed successfully.




- Select the desired option.

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

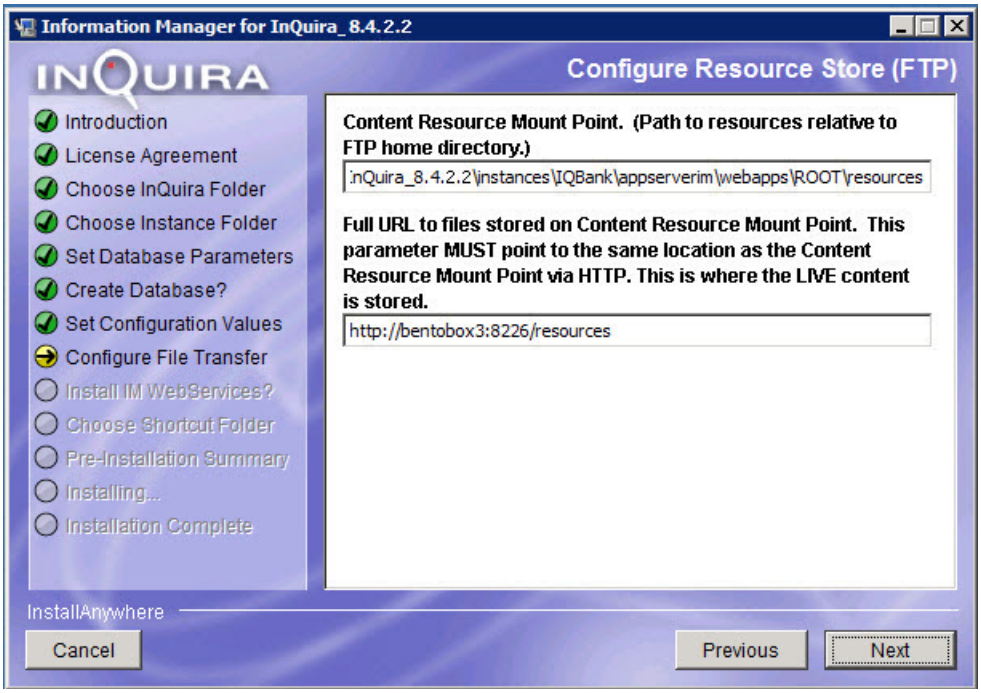
| If you want to store content resources... | Select... | Result: |
|---|---|---|
| on an FTP server | **Yes** | The installation program displays the FTP content resource store configuration screen as described in "Configuring an FTP Server Content Resource Store" on page 23. |
| on a local file system | **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 27. The local file system is the default option specified in the installer. |

- Click **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) 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. The default location is `$Oracle Knowledge_ROOT/instances/<instance_name>/appserverim/webapps/ROOT/resources`.<br>**NOTE:** The specified directory must exist or be manually created prior to using Information Manager; the installation program does 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. |

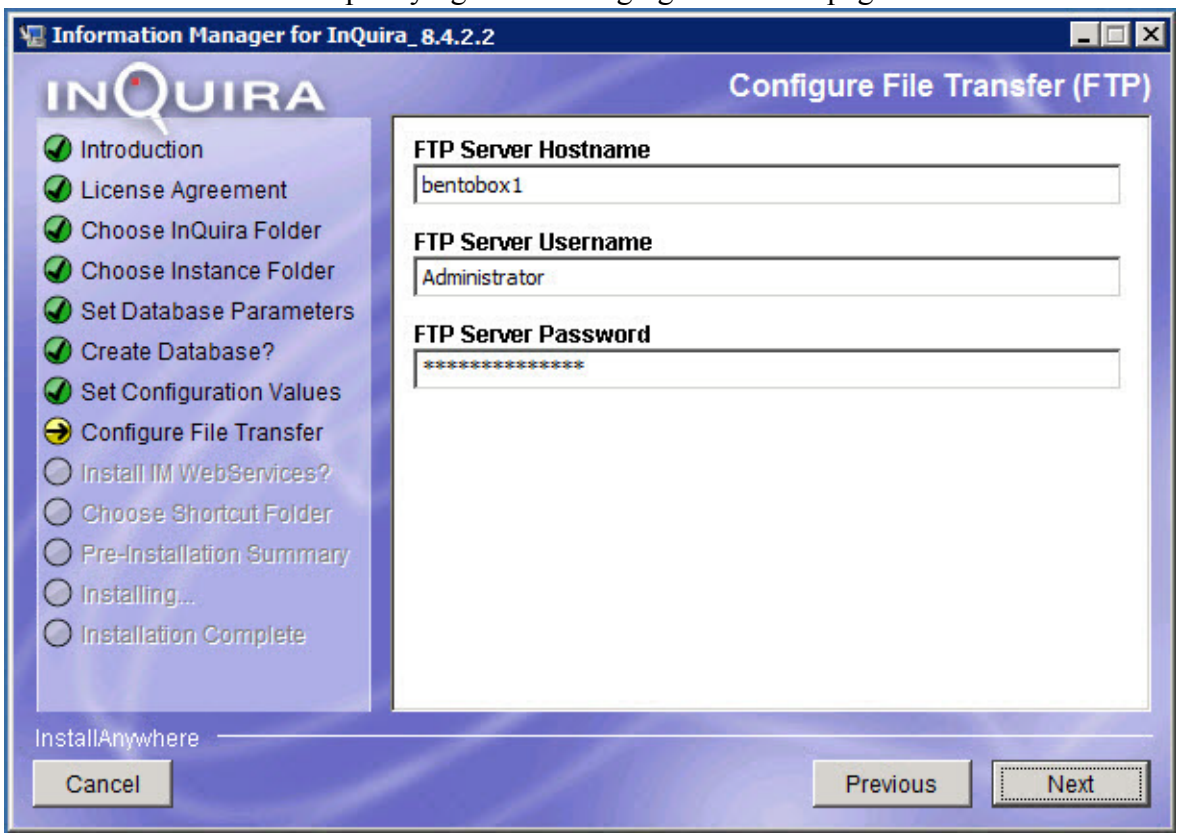
- Click **Next** to continue.

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.

**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 25.




- Specify the following FTP server parameters:

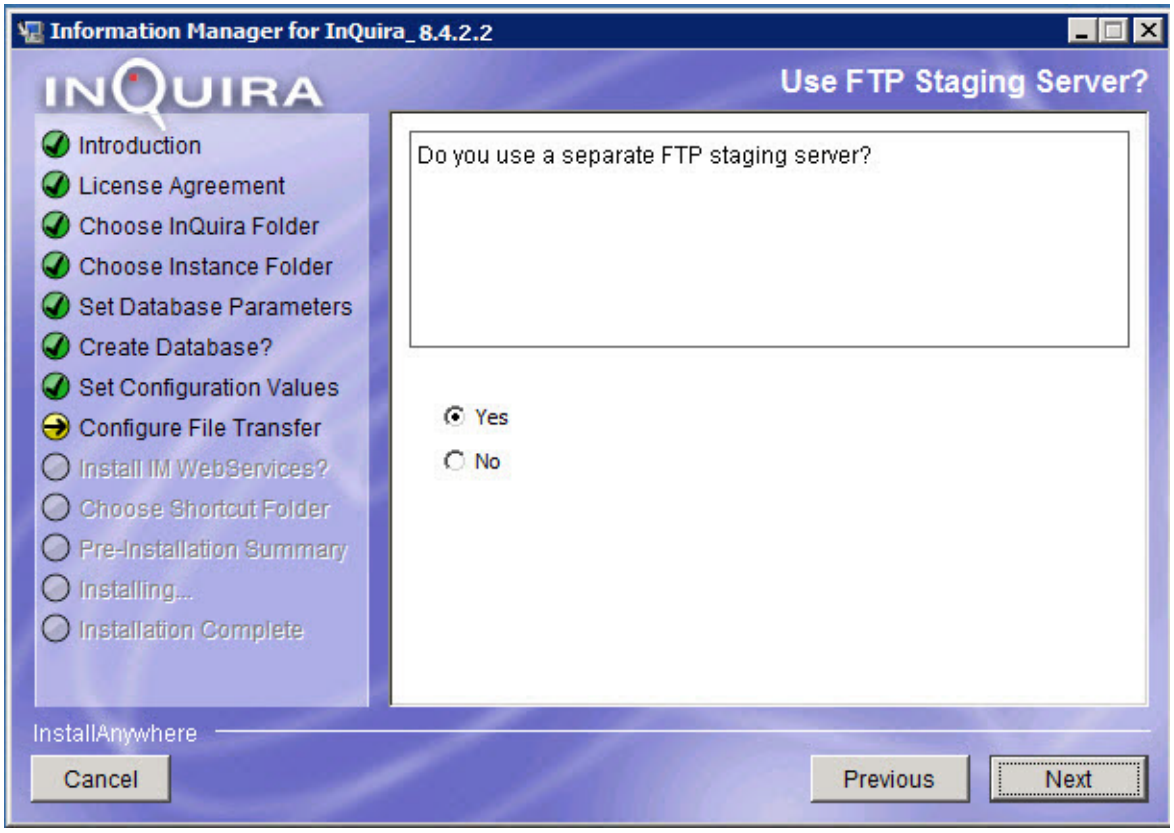
| FTP Server Property | Description |
|---|---|
| **FTP Server Hostname** | Specify the hostname for the FTP server. |
| **FTP Server Username** | Specify the user name for the FTP server. |
| **FTP Server Password** | Specify the password for the FTP server. |

- Click **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.

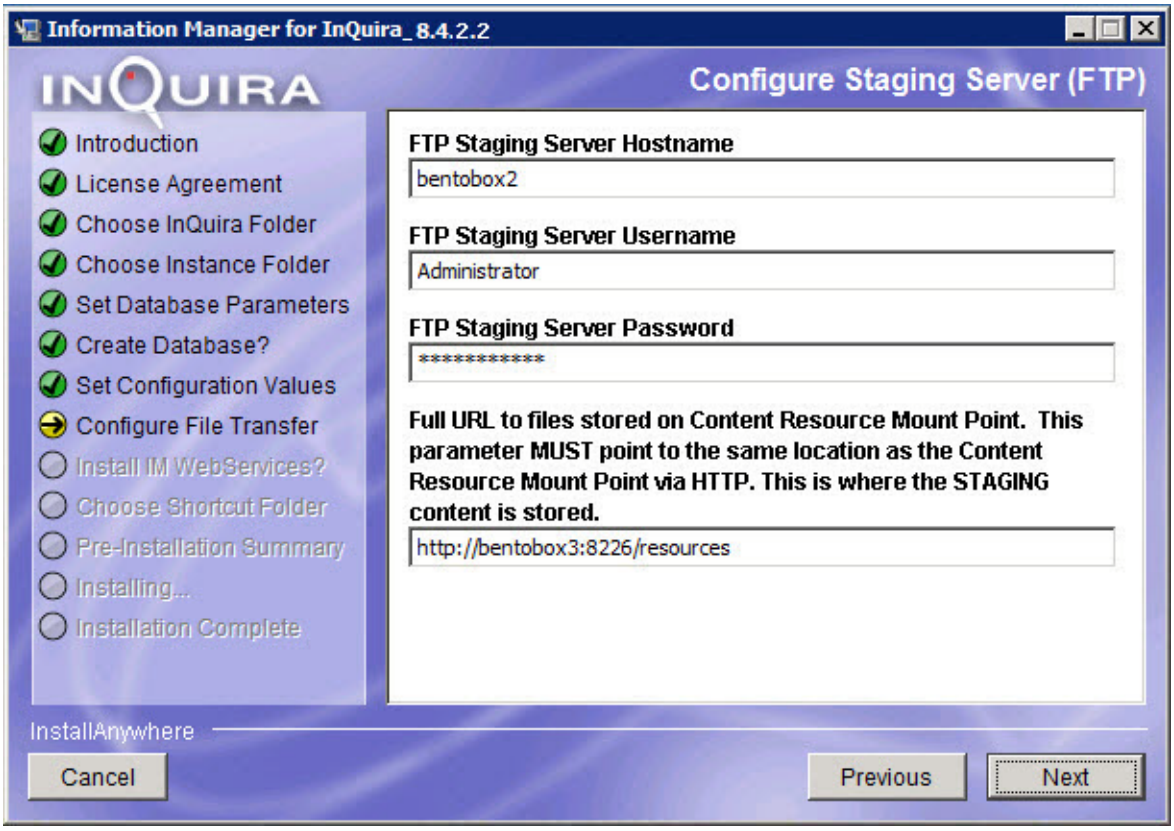
The installation program displays the FTP staging server configuration screen as described in “Configuring the FTP Staging Server” on page 26.

or

- Select **No** if you will not use a separate staging instance.
- Click **Next** to continue.

## 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:

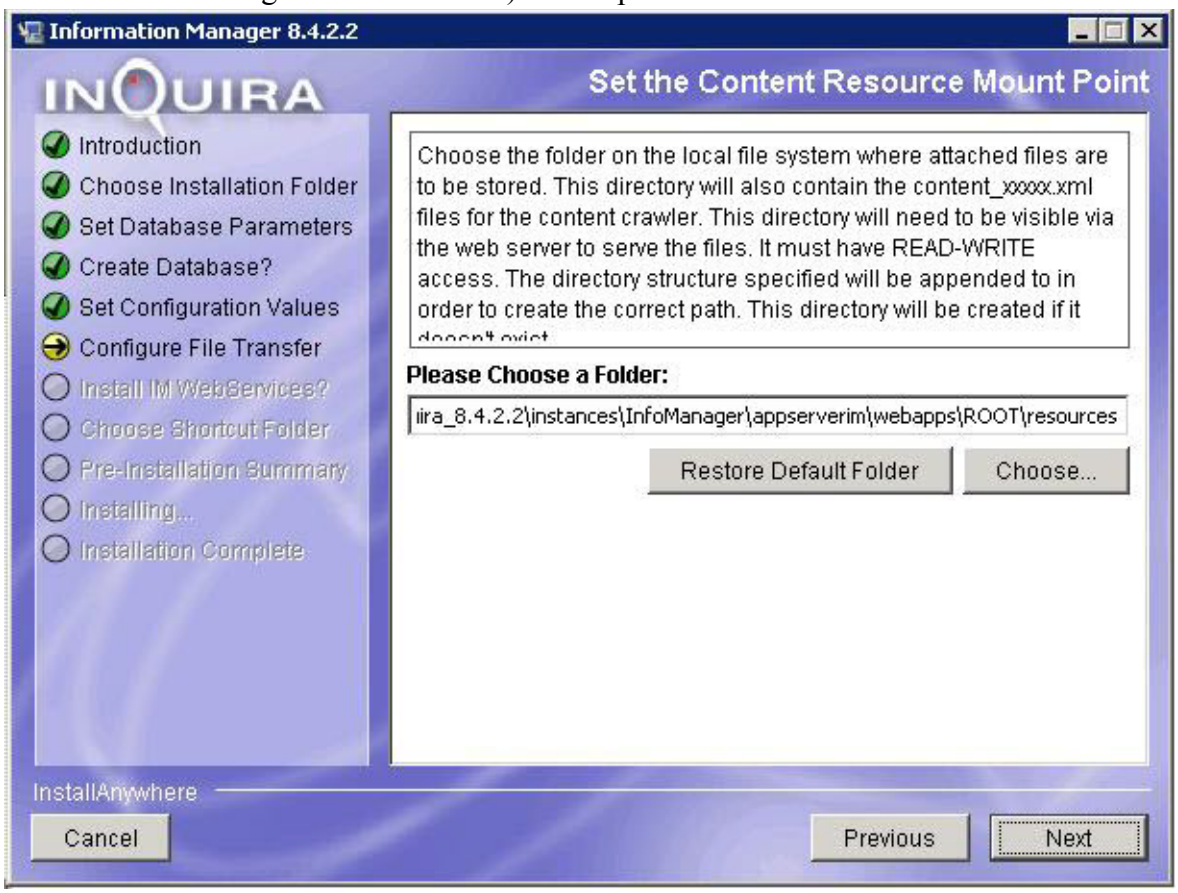
| File System Property | Description |
|---|---|
| **FTP Staging Server Hostname** | Specify the hostname for the FTP staging server. |
| **FTP Staging Server Username** | Specify the user name for the FTP staging server. |
| **FTP Staging Server Password** | Specify the password for the FTP staging 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. |

- Click **Next** to continue.

The installation program displays the Information Manager Web Services installation option screen as described in “Installing Information Manager Web Services” on page 28.

# 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.

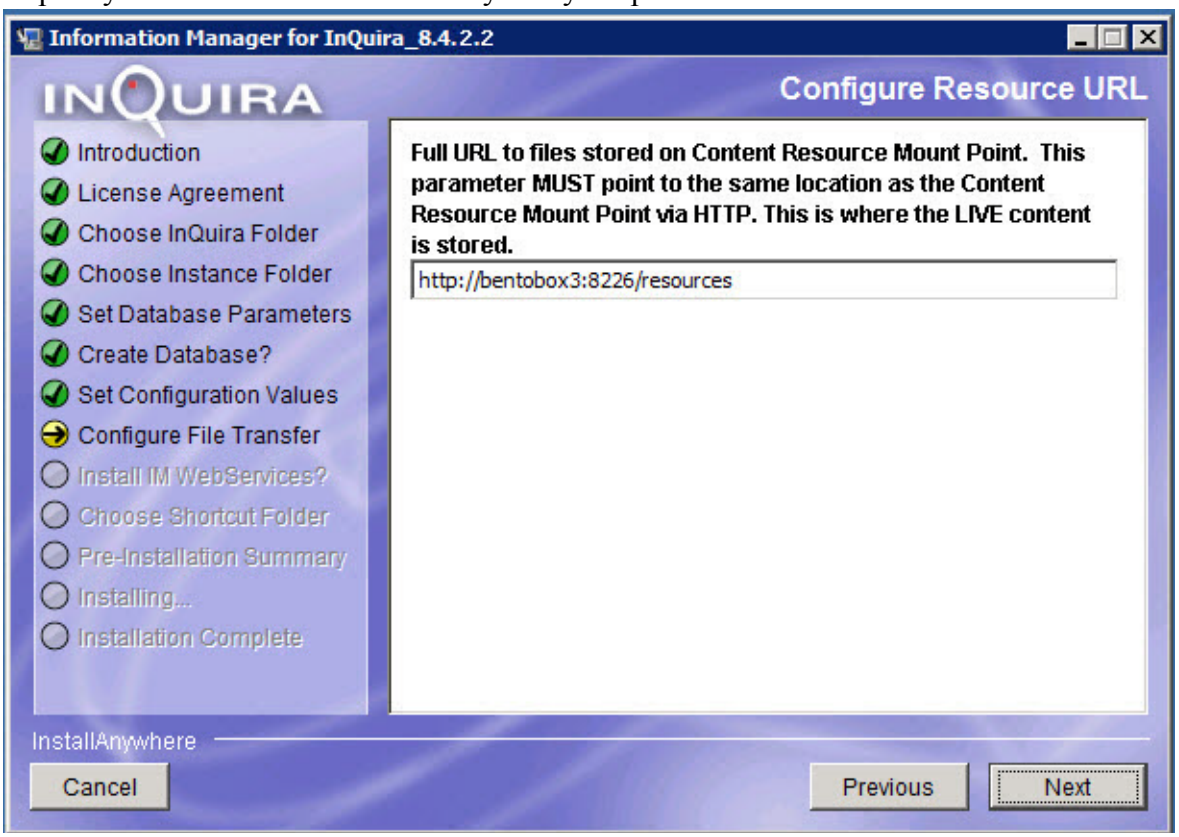
**NOTE:** The specified directory must exist or be manually created prior to using Information Manager; the installation program will not create this directory.

- Click **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.



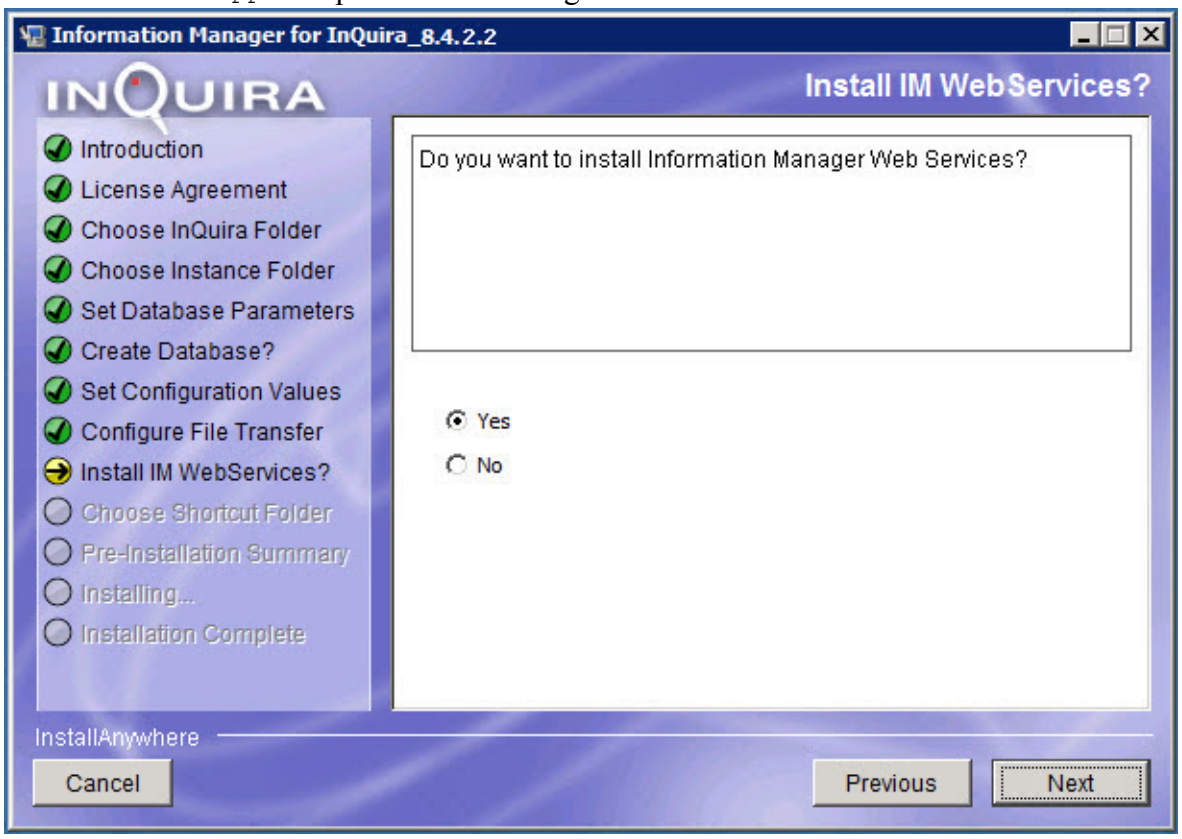

- Specify the URL that corresponds to the local directory specified as the content resource location. Information Manager will use the URL to read (retrieve) documents attached to content records in the production environment.
- Click **Next** to continue.

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. There can be multiple Information Manager Web Services instances deployed within a network - however only one of those instances should be configured to maintain the search index used by the Information Manager FIND functionality. After installation make sure that all instances are pointing to the same location. The location is configured by setting the `$IM_HOME/`

`config/<instance_name>application.properties` file and setting the `webservices.app.url` parameter to a single instance of the IMWS installation.




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

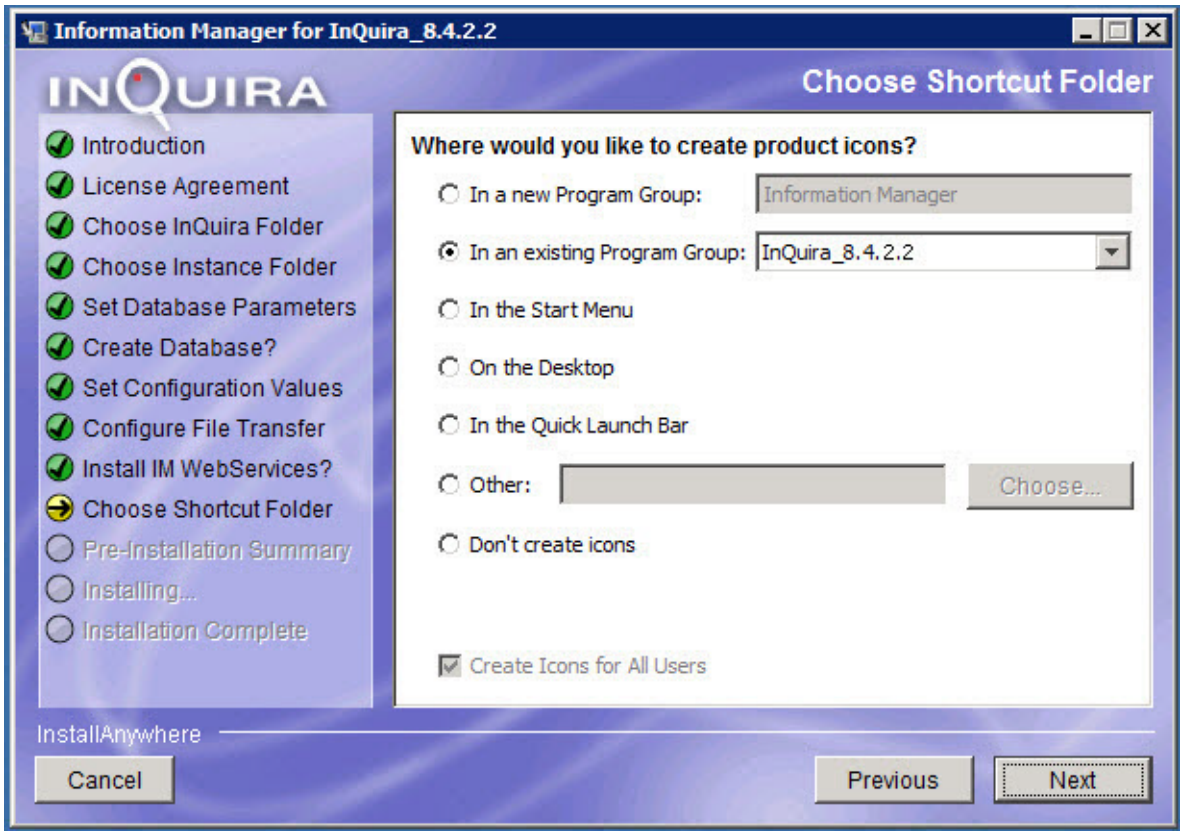
The installation program displays the shortcut creation options screen.

# Selecting Shortcut Options

Select the location in which you want to create shortcuts or links to Oracle Knowledge. If the installation program locates an existing Oracle Knowledge Program Group in Windows environments, it will use that group as the default. If the installation program does not locate an existing Oracle Knowledge 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 Oracle Knowledge icons in the Start Menu, on the Desktop, or the Quick Launch Bar for the current user or for all users
- To create no Oracle Knowledge icons
- To create icons for All Users
- To create Oracle Knowledge icons in another location

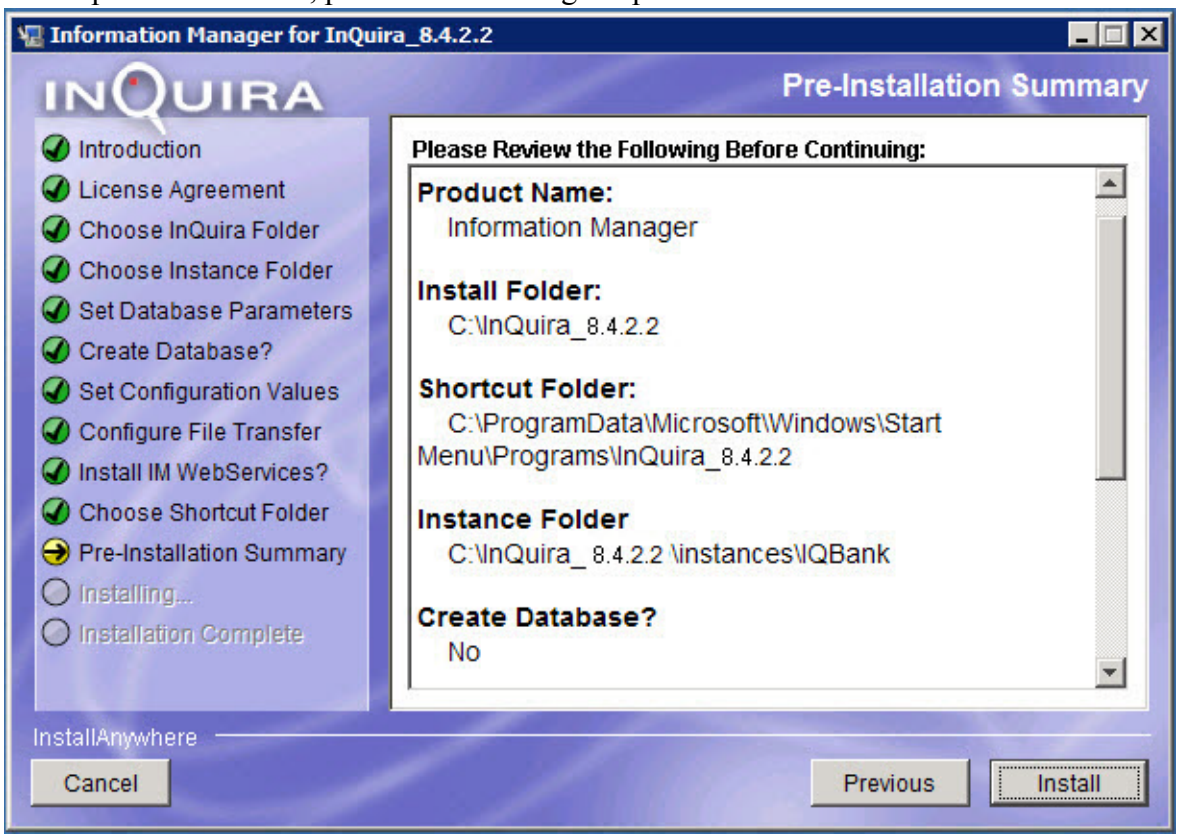



- Select the desired product icon locations.
- Click **Next** to continue.

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.

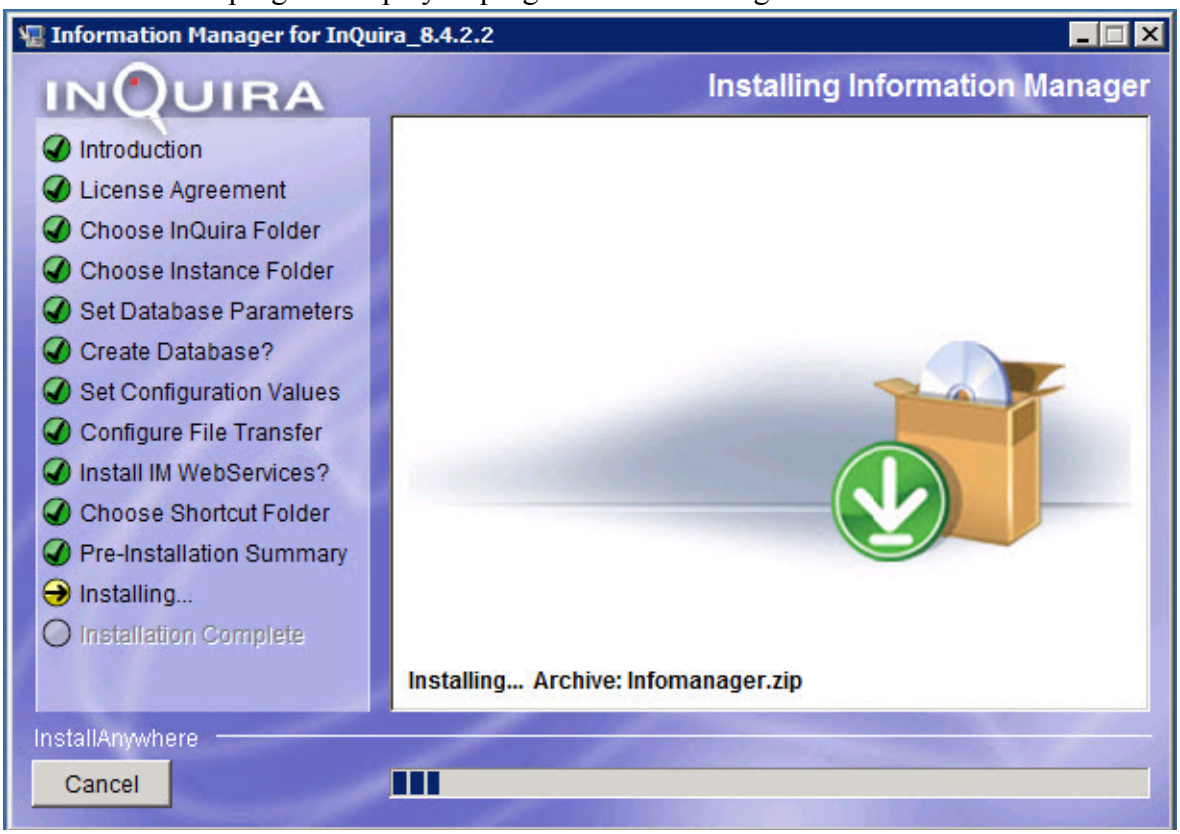



- Review your selections.
- Click **Previous** to make any corrections.
- Click **Install** to continue.

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:




The installation program installs the Information Manager files first, then installs the components selected for installation.

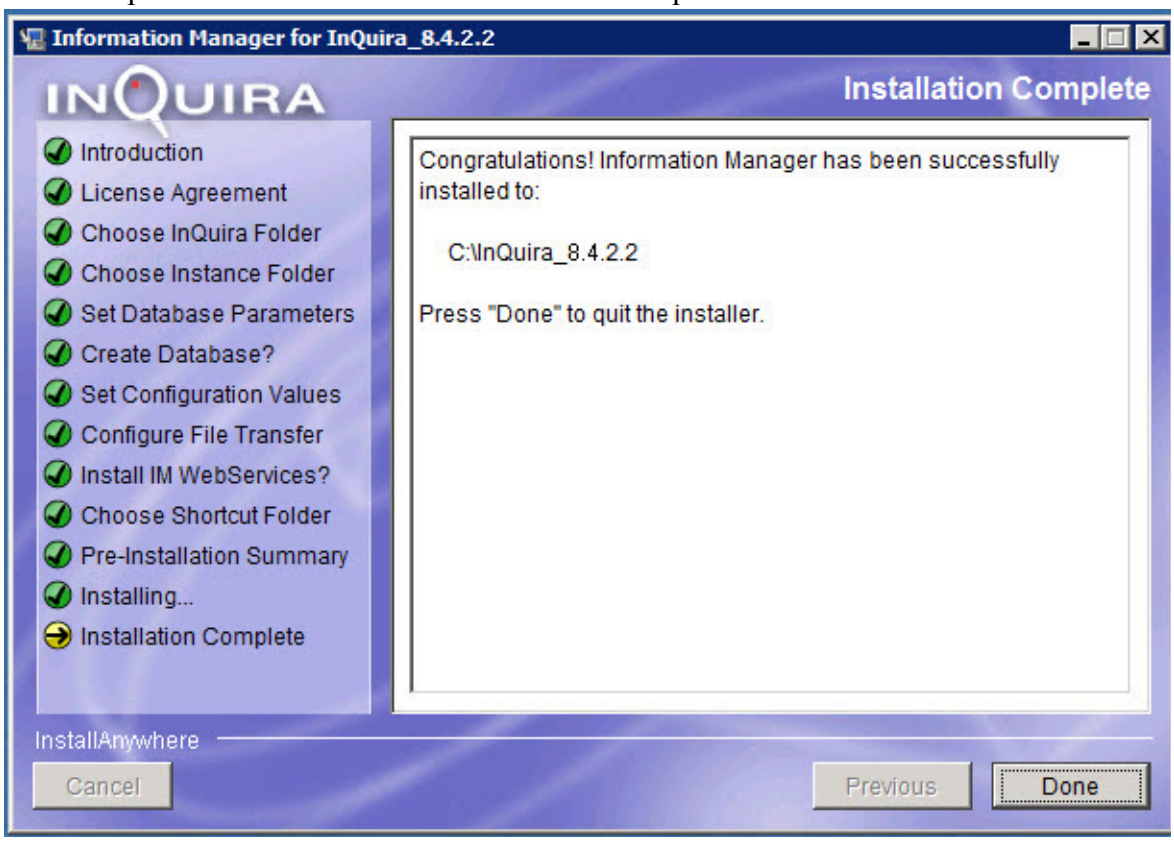
# Configuring the Information Manager Components

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.

- Click **Done** to exit the installation program.

The installation program executes its cleanup routines and terminates.

**IMPORTANT:** After completing the standalone installation process on Windows 2008 R2, the user must take ownership for the installation directory (`Oracle Knowledge_<release>`), subdirectories, and objects. The user must also have **Full control** permission on this directory.
The Oracle Knowledge Common Environment (ICE) window must be started as an administrator in order to install, uninstall, stop, or start Oracle Knowledge services.

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 environments, you must first start the Information Manager service as described in “Starting the Information Manager Service on Linux Systems” on page 34.

# Starting the Information Manager Service on Linux Systems

In Linux 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 Oracle Knowledge instance in which you installed Information Manager:

  ```
  cd <Oracle Knowledge_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 35.

CHAPTER 3

# Configuring a Web Application

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

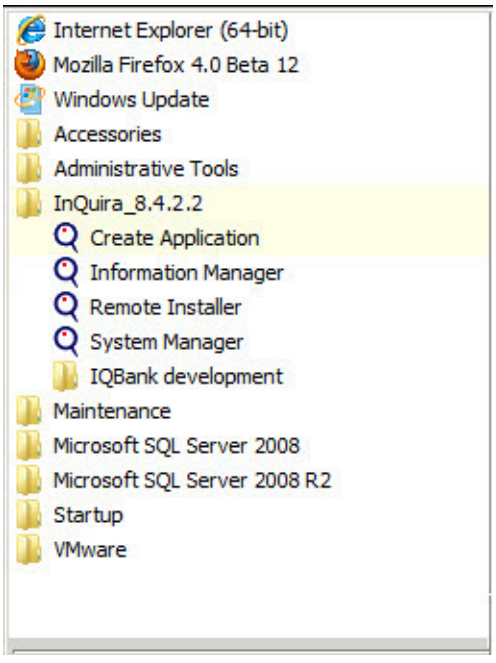
- Defining an application repository as described in “Accessing the Management Console” on page 35 and “Specifying Repository Properties” on page 36.
- Registering a web application as described in “Registering a Web Application” on page 38.

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 *“Oracle Knowledge 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_[release] > Information Manager**:




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

http://<host_name>:<port>/InfoManager

Use the following credentials to login into the IM Management Console for the first time:

| | |
|---|---|
| **Username** | SUPER |
| **Password** | admin |
| **Repository** | SYSTEM |

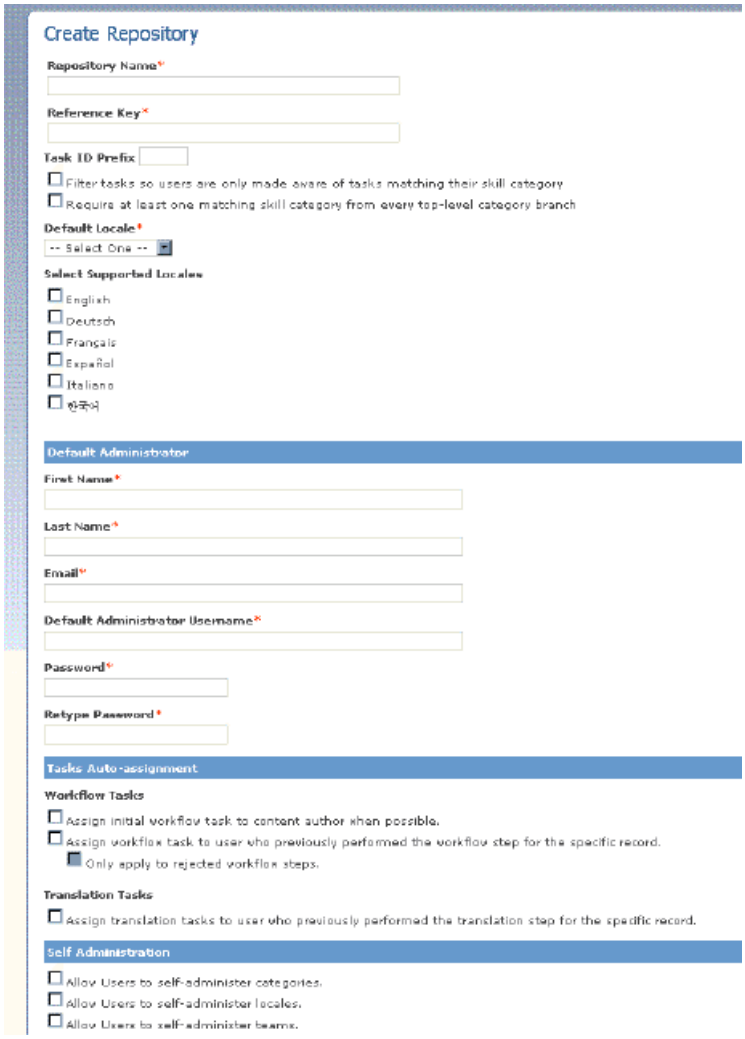
**NOTE:** Oracle recommends that the System Administrator change the passwords of the administrator accounts from the default values of SUPER/admin and Support/admin.

You should now create the first repository.

# 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 *"Oracle Knowledge 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 *"Oracle Knowledge Information Manager Administration Guide"*. |

| Property (Continued) | Description (Continued) |
|---|---|
| **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.<br>**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 *"Oracle Knowledge 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 *"Oracle Knowledge 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 *"Oracle Knowledge 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. |

- Click **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 38*.

# 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 define appTypes, register, and deploy the Information Center sample application (InfoCenter).

## Define appTypes

To define the correct appTypes follow these steps.

**For Infocenter:**

1. Log in to IM.
2. Verify the app_type is `InfoCenter:taglib`.

**For Self-Service Portal:**

1. Log in to IM.
2. Go under Tools > System(Configure) > ExpertMode.
3. Select App_Types from the list.
4. Define the app_types as follows:

```
SSP:ssp
```

**NOTE:** If you have any InfoCenter apps, append SSP as follows:

```
InfoCenter:taglib,SSP:ssp
```

**For iConnect:**

1. Log in to IM.
2. Go under Tools > System(Configure) > ExpertMode.
3. Select App_Types from the list.
4. Define the app_types as follows:

```
iConnect:iconnect
```

**NOTE:** Note : If you have any InfoCenter apps, append iConnect as follows

```
InfoCenter:taglib,iConnect:iconnect
```

## Register a Web Application

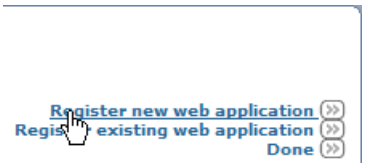
To register a web application:

- 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** | The host name and port for the servlet container, for example:<br>`http://<hostname>:<port>`<br>The default is port `8226`. |
| **Context** | 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. The context is the portion of the URL after the host/port that specifies your web application. i.e. `http://<host>:<port>/<context>`. |
| **Webapps Directory:** | The location of the webapps directory by navigating up to the instances directory, then selecting, in succession:<br>• the appropriate instance directory<br>• the appserver directory<br>• the webapps directory<br>For example:<br>`<IM_home>/<instance_name>/appserverim/webapps` |

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

| | |
|---|---|
| **URL To Container** | `http://<hostname>:<port>` |
| **Context** | application context name that will be used in the URL |
| **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 41*.

**IMPORTANT:** You must restart the Information Manager service as described in *"Restarting the Information Manager Service" on page 41* to make the application configuration changes effective in the deployed web application.

# Configuring Information Center Graphics and Formatting

You may configure the graphics and formatting resources used by the Information Center web application. Refer to the Information Manager Administration Guide for further information on configuring resources for web applications.

**IMPORTANT:** You must restart the Information Manager service as described in *"Restarting the Information Manager Service" on page 41* to make the application configuration changes effective in the deployed web application.

# Restarting the Information Manager Service

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

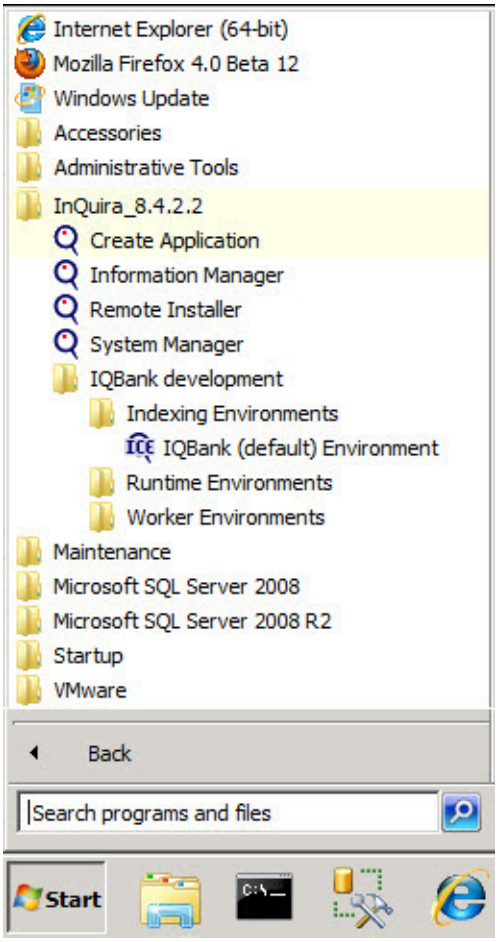
When you install and configure Oracle Knowledge and Information Manager, the installation program places Installation Configuration Environment items in the Microsoft Windows Start menu for each defined instance.

**IMPORTANT:** The Oracle Knowledge Common Environment (ICE) window must be started as an administrator in order to install, uninstall, stop, or start Oracle Knowledge services.

To restart the Information Manager service:

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

  Start => Programs => Oracle Knowledge [release] => <application_name> development=>Indexing Environments => <application_name> (default) Environment




- Enter the following command from the Installation Configuration Environment prompt:

  inquiraim restart

# 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>
```

where:

<hostname>,<port>, and <context> correspond the values specified in *"Registering a Web Application" on page 38*. See the *"Oracle Knowledge 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:

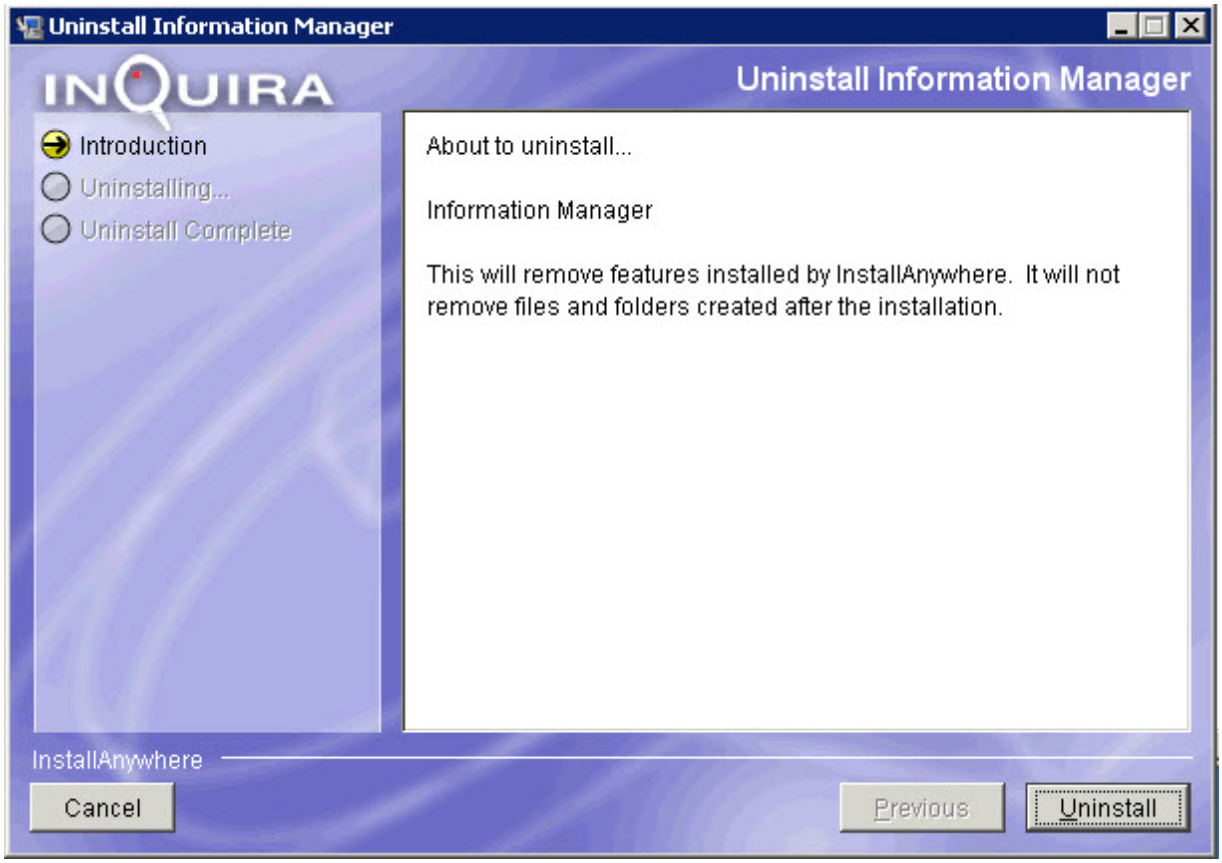
- Locate the UninstallerData folder.

  This folder is located in <Oracle Knowledge_home>>/Uninstall_Information_Manager.

- Execute Uninstall_Information_Manager.exe.

**IMPORTANT:** The uninstall program does NOT remove the IM database or the attached resources that were configured for the CONTENT_RESOURCE_MOUNT_POINT. Be sure to back up any customizations to the JSP pages or web application prior to uninstalling Information Manager

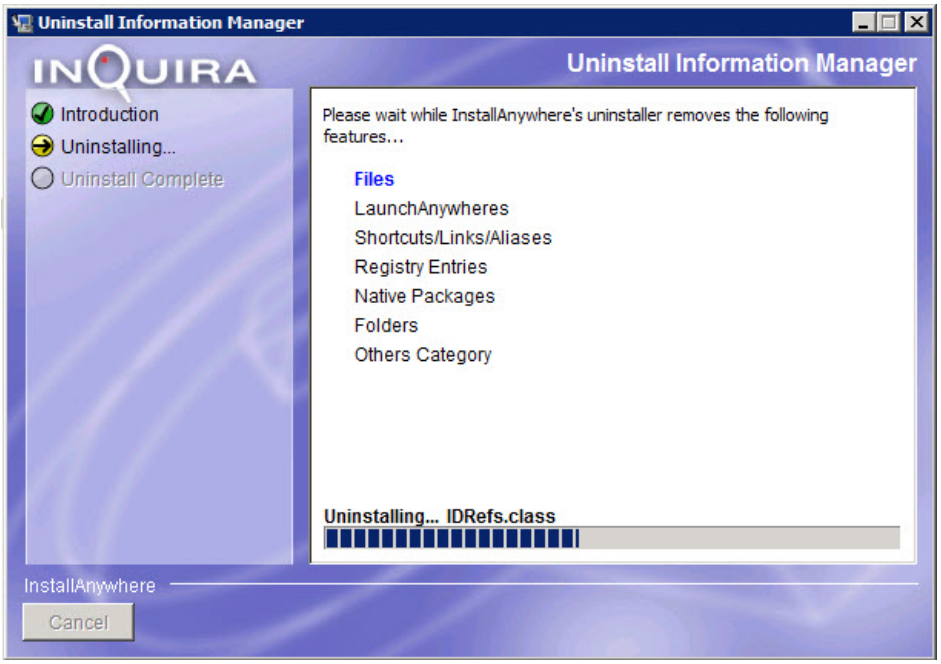
The Uninstall Information Manager screen displays.




- Click **Uninstall**.

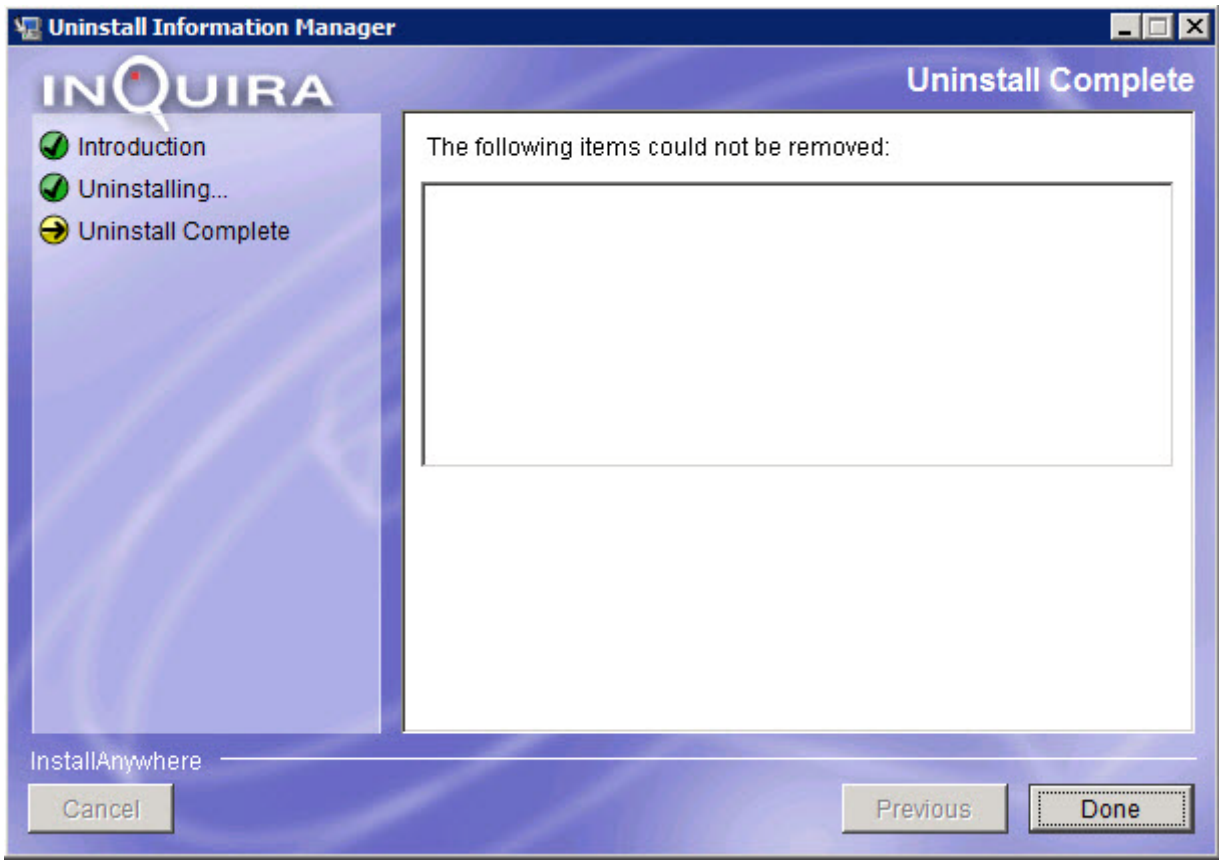
# Uninstall Information Manager

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.

- Click **Done**.