

Oracle® WebCenter Content Service for Microsoft Exchange

Installation and Upgrade Guide

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Welcome

Oracle WebCenter Content Service for Microsoft Exchange enables you to include Microsoft Exchange content in your portal from repositories inside or outside your network. Portal administrators can then create remote content sources and remote content crawlers that access Microsoft Exchange.

How to Use This Book

This book describes how to install and deploy Oracle WebCenter Content Service for Microsoft Exchange 10.3. It also provides instructions for upgrading to Oracle WebCenter Content Service for Microsoft Exchange 10.3 from earlier versions.

Audience

This guide is written for the user responsible for installing or upgrading Oracle WebCenter Content Service for Microsoft Exchange. This user must have an understanding of the existing portal deployment, knowledge of how to administer objects in the portal, and knowledge of the security required for your Microsoft Exchange system.

Organization

This guide includes the following chapters:

- This chapter provides information on how to use this guide and describes other resources available to help install, deploy, upgrade, and administer Oracle WebCenter Content Service for Microsoft Exchange.
- [Chapter 2, “Completing Pre-Installation Steps,”](#) provides hardware and software requirements, as well as environmental and third-party software prerequisites. You must read this chapter and meet the prerequisites prior to proceeding to the installation or upgrade.
- [Chapter 3, “Installing or Upgrading Oracle WebCenter Content Service for Microsoft Exchange,”](#) provides detailed instructions for installing, upgrading, and configuring Oracle WebCenter Content Service for Microsoft Exchange.
- [Chapter 4, “Importing, Configuring, and Creating Oracle WebCenter Content Service for Microsoft Exchange Objects in the Portal,”](#) provides detailed instructions for importing, configuring, and creating Oracle WebCenter Content Service for Microsoft Exchange objects in the portal.
- [Chapter 5, “Uninstalling Oracle WebCenter Content Service for Microsoft Exchange,”](#) provides instructions for uninstalling Oracle WebCenter Content Service for Microsoft Exchange.

Typographical Conventions

This book uses the following typographical conventions.

Table 1-1 Typographical Conventions

Convention	Typeface	Examples/Notes
<ul style="list-style-type: none"> Items you need to take action on (such as files or screen elements) 	bold	<ul style="list-style-type: none"> Upload Procedures.doc to the portal. To save your changes, click Apply Changes.
<ul style="list-style-type: none"> User-defined variables New terms Emphasis Object example names 	<i>italic</i>	<ul style="list-style-type: none"> The migration package file is located in <i>install_dir</i>\serverpackages. <i>Portlets</i> are Web tools embedded in your portal. The URI <i>must</i> be a unique number. The example Knowledge Directory displayed in Figure 5 shows the <i>Human Resources</i> folder.
<ul style="list-style-type: none"> Text you enter Computer generated text (such as error messages) Code samples 	<code>computer</code>	<ul style="list-style-type: none"> Type <code>Marketing</code> as the name of your community. This script may generate the following error: ORA-00942 table or view does not exist Example: <pre><setting name="SSOCookieIsSecure"> <value xsi:type="xsd:integer">0</value> </setting></pre>
<ul style="list-style-type: none"> Environment variables 	<code>ALL_CAPS</code>	<ul style="list-style-type: none"> <code>ORACLE_HOME</code> specifies the directory where Oracle products are installed.

Oracle Documentation and Resources

This section describes other documentation and resources provided by Oracle.

Table 1-2 Oracle Documentation and Resources

Resource	Description
Release Notes	<p>The release notes provide information about new features, issues addressed, and known issues in the release.</p> <p>They are available on the Oracle Technology Network at http://download.oracle.com/docs/cd/E13158_01/alui/integration/exchanges/docs103/sitemap.html.</p>
Online Help	<p>The online help is written for all levels of Oracle WebCenter Content Service for Microsoft Exchange users. It describes the user interface for Oracle WebCenter Content Service for Microsoft Exchange and gives detailed instructions for completing tasks in Oracle WebCenter Content Service for Microsoft Exchange.</p> <p>To access online help, click the help icon.</p>
Oracle Technology Network (OTN)	<p>The Oracle Technology Network is the world's largest community of developers, DBAs, and architects using Oracle products and industry-standard technologies. Every day, members collaborate via OTN to share real-world insight, expertise, and best practices on how to build, deploy, manage, and optimize applications.</p> <p>As a member of the Oracle Technology Network you will enjoy access to software downloads, discussion forums, documentation, wikis, podcasts, blogs, plus much more.</p> <p>Access the Oracle Technology Network at http://www.oracle.com/technology/index.html.</p>
Oracle Support	<p>The Oracle Support site provides access to all Oracle support resources including online support, software and patches, technical articles, and contact numbers.</p> <p>Access the Oracle Support site at http://www.oracle.com/support/index.html.</p>

Completing Pre-Installation Steps

This section describes the following pre-installation steps that will ensure a successful installation:

1. Download the most up-to-date documentation from the Oracle Technology Network at http://download.oracle.com/docs/cd/E13158_01/alui/integration/exchange/cs/docs103/sitemap.html.
2. Read the release notes for additional information on compatibility issues, known problems, and workarounds that might affect how you proceed with your deployment. Release notes are located at the top-level directory of the product package.
3. Provision host computers for your deployment and install prerequisite software. For details, see “[Hardware and Software Requirements](#)” on page 2-1.
4. Create and configure a Windows user for running Oracle WebCenter Content Service for Microsoft Exchange content crawler jobs. For details, see “[Creating a Windows User for Oracle WebCenter Content Service for Microsoft Exchange](#)” on page 2-3.

Hardware and Software Requirements

Note: For the most up-to-date list of supported software for your deployment, refer to the Interoperability page in the Product Center at <http://one.bea.com/support>.

The following table summarizes the hardware, operating system, and software requirements for Oracle WebCenter Content Service for Microsoft Exchange.

Component	Requirement
Oracle WebCenter Content Service for Microsoft Exchange Host Computer	Hardware <ul style="list-style-type: none">• 512 MB memory• 128 MB disk space Software <ul style="list-style-type: none">• Operating System: Microsoft Windows 2000 Server SP4, 2003 Server SP1• Application Server: IIS 5.0, IIS 6.0• Microsoft Exchange Client: Microsoft Outlook 2000, 2002, 2003
Exchange Server	<ul style="list-style-type: none">• Microsoft Exchange Server 2003 or Microsoft Exchange 6.5• Microsoft Exchange Server 2000 or Microsoft Exchange 6.0• Microsoft Exchange 5.5
Network	<p>You must be able to configure communication between the remote server, the portal, and the Microsoft Exchange Server.</p> <p>If the Microsoft Exchange Server is located on a computer outside of the portal and remote server domain, you must configure trust relations between domains.</p>
Portal Software	Oracle WebCenter Interaction 10.3
Client Browser	<ul style="list-style-type: none">• Internet Explorer 6.0, 7.0• Netscape 7.2, 8.0• Firefox 1.0, 1.5, 2.0• Safari 1.3, 2.0

Administrative User Requirements

The installation and configuration of Oracle WebCenter Content Service for Microsoft Exchange components require the following administrative user permissions.

User	Permissions
Local Host Administrator Account	To install Oracle WebCenter Content Service for Microsoft Exchange components, you must log in to the host computer as the local administrator.
Portal Database and Portal Administrative User Accounts	To configure the required portal database and portal administrative objects, you must provide the user name and password for the appropriate administrative user accounts.

Creating a Windows User for Oracle WebCenter Content Service for Microsoft Exchange

To create and configure a Windows user for use with Oracle WebCenter Content Service for Microsoft Exchange:

1. Create a Windows user named `ali-exchangeecs-user` and provision an account for this user on the Microsoft Exchange Server. This administrative user runs the crawl jobs, so you should create the account for this purpose only.
2. On the remote server host computer, log in as `ali-exchangeecs-user`, open Microsoft Outlook and dismiss any initialization screens.
3. Configure Microsoft Outlook as the default mail client for `ali-exchangeecs-user`.
4. Make sure `ali-exchangeecs-user` can access all the Microsoft Exchange folders you want to crawl.
5. To test connectivity between the Microsoft Outlook client and the Microsoft Exchange Server, send mail from `ali-exchangecws-user` to `ali-exchangeecs-user`.

Note: Oracle WebCenter Content Service for Microsoft Exchange does not send or receive mail. This step is only a test.

Completing Pre-Installation Steps

Installing or Upgrading Oracle WebCenter Content Service for

Microsoft Exchange

This section describes the following steps that ensure successful installation:

1. Verify that you have completed the pre-installation procedures. For details, see [“Completing Pre-Installation Steps” on page 2-1](#).
2. Install product files on the remote server host. For details, see [“Installing or Upgrading Product Files” on page 3-1](#).

Installing or Upgrading Product Files

Oracle WebCenter Content Service for Microsoft Exchange is implemented as a remote server in the context of the portal deployment. You install the product on a remote server host computer that can communicate with the portal. Except in the case of a development or test environment, the remote server host computer should not host the Oracle WebCenter Interaction portal application. For host specifications, see [“Hardware and Software Requirements” on page 2-1](#).

Note: If you have previously installed Oracle WebCenter Content Service for Microsoft Exchange, we recommend uninstalling the earlier files before installing the current version.

To install product files:

1. Log in to the host computer as the local host administrator.
2. Close all applications.
3. Copy the installation package (**ALIContentService-Exchange_v5-2.exe**) to a location on the remote server host.
4. Launch the installer by double-clicking **ALIContentService-Exchange_v5-2.exe**.
5. In the Location to Save Files dialog box, accept the default folder. These files are copied to your computer temporarily for the installation and will be removed when you complete installation.
6. Complete the installation wizard pages as described in the following table.

Note: To facilitate any troubleshooting that might be required, as well as communication among IT staff and customer support, we recommend that you keep the default settings.

Wizard Page	Description
Welcome	Click Next .
Choose Destination Location	<p>Accept the default installation location or browse to another directory. Then click Next.</p> <p>The default is the value that you set for PT_HOME, for example C:\bea\alui.</p>
Select Web Site Type	<ul style="list-style-type: none"> • Use Default Web Site - The default Web site listens on port 80. • Use Another Web Site - You will specify the Web site details on the next page of the installer. <p>Specify if you want to use the default Web site. If you choose to use the default Web site, you will automatically skip the next wizard page.</p> <p>Then click Next.</p>
Select Web Site	<ul style="list-style-type: none"> • Enter a name for the Web site so that you are able to identify the Web site in IIS. <p>Note: If you have not previously installed Web services on this computer, the default name is ptws. We also recommend that all Content Services and Identity Services on the same host computer be deployed in the same location.</p> <ul style="list-style-type: none"> • Enter port numbers for regular and secure access. The defaults are 8082 and 9002. <p>Then click Next.</p>

Wizard Page	Description
Select Web Site Security	Specify HTTP or HTTPS. If you specify HTTPS, you must configure HTTPS according to the documentation provided by your SSL vendor and implement a valid digital certificate. Then click Next .
Internet Alias	Specify the alias for the host computer Web services. The default is http://<RemoteServer>:8082 . We recommend you accept the default. Then click Next .
Windows Domain	Enter the domain that contains ali-exchangecws-user, the user you created in “Completing Pre-Installation Steps” on page 2-1 . Then click Next .
ALI user Windows Password	Enter ali-exchangecws-user and the corresponding password. This is the user you created in “Completing Pre-Installation Steps” on page 2-1 . Then click Next .

7. On the Pre-Installation Summary page, click **Install** to begin installation.
8. Click **Done** to exit the installer and restart your computer.

Installing or Upgrading Oracle WebCenter Content Service for Microsoft Exchange

Importing, Configuring, and Creating Oracle WebCenter Content Service for

Microsoft Exchange Objects in the Portal

After you have run the installation wizard and verified correct installation, import, configure, and create Oracle WebCenter Content Service for Microsoft Exchange objects in the portal.

Complete the following steps:

- Copy the online help files from the remote server host computer to the Image Server. For example, copy the contents of `C:\bea\alui\WebServices\Exchange\help\50` to `<ImageService>\ptimages\imageserver\webervices\exchange`.

For Java portals, the path separator is a forward slash (/).

- Import the remote server and content Web service. For details, see [“Importing the Remote Server and Content Web Service” on page 4-3](#)
- Map Oracle WebCenter Content Service for Microsoft Exchange file types. For details, see [“Mapping File Types” on page 4-4](#).
- Configure Oracle WebCenter Content Service for Microsoft Exchange security. For details, see [“Configuring Security” on page 4-4](#).

- Create a content source. For details, see [“Creating a Content Source” on page 4-5](#).
- Create a content crawler. For details, see [“Creating a Content Crawler” on page 4-5](#).
- Create a job. For details, see [“Creating a Job” on page 4-6](#).

Importing the Remote Server and Content Web Service

Import the Oracle WebCenter Content Service for Microsoft Exchange remote server and content Web service into the portal using the Object Migration utility:

1. On the computer that hosts the portal application, map or mount a network drive connection to the Oracle WebCenter Content Service for Microsoft Exchange host computer or copy files to an accessible directory.
2. Log in to the portal as an administrator.
3. Click **Administration**.
4. From the Select Utility menu, select **Migration - Import**.
5. Browse to the migration package. If you accepted installation defaults, the location is:
\\<**RemoteServer**>\bea\alui\serverpackages\ExchangeWSOAndRemoteServer.ptc
6. Click **Load Package**.
7. Select **Overwrite Remote Servers**.
8. Click **Finish**.
9. Open the **Oracle WebCenter Content Service for Microsoft Exchange** folder.
10. Expand the Remote Server section and click the **Oracle WebCenter Content Service for Microsoft Exchange** remote server.
11. On the Main Settings page of the Remote Server Editor, in the **Base URL** box, replace CHANGE_ME with the name of the remote server that hosts Oracle WebCenter Content Service for Microsoft Exchange.
12. Click **Finish**.

Stay logged in to the portal for the next procedure.

Mapping File Types



To map Microsoft Exchange file types to portal file types, import the Oracle WebCenter Content Service for Microsoft Exchange content types into the portal using the Object Migration utility:

1. From the Select Utility menu, select **Migration - Import**.
2. Browse to the migration package. If you accepted installation defaults, the location is:
`\\<RemoteServer>\bea\alui\serverpackages\MSEExchangeCrawlerGlobalObjects.pte`
3. Click **Load Package**.
4. Click **Finish**.

Stay logged in to the portal for the next procedure.

Configuring Security

To configure security settings for the Oracle WebCenter Content Service for Microsoft Exchange:

1. Deploy an authentication source (for example, LDAP) to manage Microsoft Exchange users. For details, refer to Microsoft Exchange documentation.
2. Create a remote authentication source in the portal to import the Microsoft Exchange users. For details, refer to the portal's online help or the *Administrator Guide for Oracle WebCenter Interaction*.
3. Configure the Global ACL Sync Map to associate the Microsoft Exchange domain name with the authentication source:
 - a. Log in to the portal as an administrator.
 - b. Click **Administration**.
 - c. From the Select Utility menu, select **Global ACL Sync Map**.
 - d. Click  **Add Mapping** and choose the authentication source you created in step 2.
 - e. In the **Domain Name** column, click  and enter the domain name of the Microsoft Exchange users.
 - f. Click **Finish**.

4. Open the **Oracle WebCenter Content Service for Microsoft Exchange** folder.
5. Expand the Web Service section and click the **Oracle WebCenter Content Service for Microsoft Exchange** Web service.
6. On the left, under Edit Object Settings, click **Advanced Settings**.
7. Select **Supports importing security with each document**.
8. Click **Finish**.

You will configure additional security settings in the Content Crawler Editor as described in [“Creating a Content Crawler” on page 4-5](#).

Stay logged in to the portal for the next procedure.

Creating a Content Source

Create a content source to define the area of Microsoft Exchange from which you want to import content. To create a content source, perform the following steps in the portal’s Administrative Object Directory:

1. Open the **Oracle WebCenter Content Service for Microsoft Exchange** folder.
2. From the Create Object menu, select **Content Source - Remote**.
3. In the Choose Web Service dialog box, choose the **Oracle WebCenter Content Service for Microsoft Exchange** Web service.
4. Configure the content source as described in the online help.

Stay logged in to the portal with the Oracle WebCenter Content Service for Microsoft Exchange folder open for the next procedure.

Creating a Content Crawler

Create a content crawler to import content from the content source. To create a content crawler, perform the following steps in the Oracle WebCenter Content Service for Microsoft Exchange folder of the portal’s Administrative Object Directory:


1. From the Create Object menu, select **Content Crawler - Remote**.
2. In the Choose Content Source dialog box, choose the content source you created in the previous procedure.

3. On the Main Settings page of the Content Crawler Editor, select **Import security with each document**. Configure the rest of the content crawler as described in the online help.

Stay logged in to the portal with the Oracle WebCenter Content Service for Microsoft Exchange folder open for the next procedure.

Creating a Job

To import content, you must associate the content crawler with a job and run the job. To create and run a job, perform the following steps in the Oracle WebCenter Content Service for Microsoft Exchange folder of the portal's Administrative Object Directory:

1. From the Create Object menu, select **Job**.
2. Click  **Add Operation**.
3. Choose the content crawler created in the previous procedure.
4. Choose the scheduling values for the job and click **Finish**.
5. Name the job and click **OK**.
6. When you are finished creating the job, make sure the Oracle WebCenter Content Service for Microsoft Exchange folder is associated with an automation service. For assistance, see the online help under **Select Utilities | Automation Service**.

Uninstalling Oracle WebCenter Content Service for Microsoft Exchange

1. Use the Windows Add/Remove Programs utility to remove the Oracle WebCenter Content Service for Microsoft Exchange software from your remote server. The uninstaller removes the war files and Java application files that were installed. After the uninstallation process has completed, it is safe to delete the installation directory.
2. Remove the deployed application from the application server according to its documentation.
3. After the removal process has completed, it is safe to delete the any directories created for the Oracle WebCenter Content Service for Microsoft Exchange in the application server environment.

Uninstalling Oracle WebCenter Content Service for Microsoft Exchange

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