



BEA AquaLogic™ Interaction Collaboration

Installation and Upgrade Guide

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Welcome to Collaboration

This book describes the procedures required to install, upgrade, and perform basic configuration of BEA AquaLogic Interaction Collaboration (“Collaboration”).

Note: “BEA AquaLogic Interaction Collaboration” is the updated product name for “Plumtree Collaboration”. Additionally, “BEA AquaLogic Interaction” is the updated product name for “Plumtree Foundation” (version 6.x), and “Plumtree Corporate Portal” (version 5.0.x). Some portal objects are still referred to by their old Plumtree names.

Note: References in this documentation to Plumtree Corporate Portal 5.0.x apply to Plumtree Corporate Portal 5.0.4/5.0.5/5.0.4J/5.0.5J.

Typographical Conventions

This book uses the following typographical conventions.

Table 1-1 Typographical Conventions

Convention	Typeface	Example
File names	bold	• Upload Procedures.doc to the portal.
Folder names		• Open the General folder.
Screen elements		• To save your changes, click Apply Changes .
Text you enter	<code>computer</code>	• Type <code>Marketing</code> as the name of your community.
Variables you enter	<i>italic</i> <code>computer</code>	• Enter the base URL for the Portlet Server. For example, <code>http://my_computer/</code> .
New terms	<i>italic</i>	• <i>Portlets</i> are Web tools, embedded in your portal.
Emphasis		• The URI <i>must</i> be a unique number.
Portal object example names		• The example Knowledge Directory displayed in Figure 5 shows the <i>Human Resources</i> folder.

BEA Documentation and Resources

This section describes the documentation and resources provided by BEA.

Table 1-2 BEA Documentation and Resources

Resource	Description
Administrator Guide	This book describes how to manage and maintain Collaboration. It is available in electronic form (PDF) in the release package and on edocs.bea.com .
Release Notes	These files are written for Collaboration administrators. They include information about new features and known issues in the release. They are available in electronic form (HTML) on edocs.bea.com .

Table 1-2 BEA Documentation and Resources


Resource	Description
Developer Guides, Articles, API Documentation, Blogs, Newsgroups, and Sample Code	These resources are provided for developers on the BEA dev2dev site (dev2dev.bea.com). They describe how to build custom applications using AquaLogic User Interaction and how to customize AquaLogic User Interaction products and features.
Deployment Guide	This document is written for business analysts and system administrators. It describes how to plan your BEA AquaLogic User Interaction deployment. It is available in electronic form (PDF) on edocs.bea.com .
Online Help	The online help is written for all levels of Collaboration users. It describes the user interface for the portal and gives detailed instructions for completing tasks in the portal. To access online help, click  Help in the upper-right corner of the portal banner or portlet.

Table 1-2 BEA Documentation and Resources

Resource	Description
AquaLogic User Interaction Support Center	<p>The AquaLogic User Interaction Support Center is a comprehensive repository for technical information on AquaLogic User Interaction products. From the Support Center, you can access products and documentation, search knowledge base articles, read the latest news and information, participate in a support community, get training, and find tools to meet most of your AquaLogic User Interaction-related needs. The Support Center encompasses the following communities:</p> <p>Technical Support Center</p> <p>Submit and track support incidents and feature requests, search the knowledge base, access documentation, and download service packs and hotfixes.</p> <p>News & Events</p> <p>The News & Events Center features information on rolling-out a successful deployment. Visit the Super User Group page to collaborate with peers and view upcoming meetings.</p> <p>Product Center</p> <p>Download products, read Release Notes, access recent product documentation, and view interoperability information.</p> <p>Education Center</p> <p>Find information about available training courses, purchase training credits, and register for upcoming classes.</p> <p>If you do not see the Support Center when you log in to http://portal.plumtree.com, contact ALUISupport@bea.com for the appropriate access privileges.</p>

Table 1-2 BEA Documentation and Resources

Resource	Description
dev2dev.bea.com	Download developer tools and documentation, get help with your development project, and interact with other developers via BEA’s dev2dev Newsgroups.
Technical Support	<p>If you cannot resolve an issue using the above resources, BEA Technical Support is happy to assist. Our staff is available 24 hours a day, 7 days a week to handle all your technical support needs.</p> <p>E-mail: ALUISupport@bea.com</p> <p>Phone Numbers:</p> <p>U.S. and Canada+1 415.263.1696 or +1 866.262.PLUM (7586)</p> <p>Asia Pacific+61 2.9931.7822</p> <p>Europe and U.K.+44 (0)1628 589124</p> <p>France+33 1.46.91.86.79</p> <p>Singapore+65 6832.7747</p>

Welcome to Collaboration

Introduction

This chapter provides an overview of Collaboration and lists the minimum hardware and software requirements.

Collaboration Overview

This section provides a general overview of Collaboration and its components. It also describes how these components are shared and interact with the portal.

Collaboration Components

This section provides an overview of Collaboration components. For more information on Collaboration and how it is used within the context of the portal, see the *Administrator Guide for BEA AquaLogic Interaction Collaboration*.

Collaboration contains the following components:

Table 2-1 Collaboration Components

Component	Description
Portal	<p>Serves end user portal pages and content.</p> <p>The portal allows end users to access portal content via MyPages, Community Pages, the Knowledge Directory, and Search. The portal also enables administrative actions, such as setting preferences on portlets or managing communities.</p>

Collaboration	<p>Collaboration expands the functionality of the portal.</p> <p>Collaboration allows multiple users to collaborate on projects and tasks. It also controls access based on access rights assigned to each user.</p>
Image Service	<p>Serves static content used or created by portal components.</p> <p>The Image Service serves images and other static content for use by the system.</p>
Notification Service	<p>Generates and sends e-mail notifications from projects to project users, and functions as a job server for Collaboration. These jobs are distinct from portal jobs, which run using the Automation Service. Jobs include, but are not limited to: summary notification, community role synchronization, and recycle bin management. All jobs run daily, and are managed in a queue; each time a job is completed, it is re-added to the queue.</p> <p>Note: The Notification Service is not required for users to employ the E-mail a Project feature. However, if the Notification Service is not running, the E-mail a Project feature is less useful. For more information about E-mail a Project, see <i>Administrator's Guide for BEA AquaLogic Interaction Collaboration</i>.</p>
Search Service	<p>Returns indexed content stored in the portal.</p> <p>Search Service returns content that is indexed in the system from the portal, Collaboration, and Publisher. Content that is indexed in the system includes documents, portlets, communities, and users as well as many other portal objects.</p>
Automation Service	<p>Runs jobs and other automated portal tasks.</p> <p>The Automation Service runs jobs that perform tasks such as crawling documents into the Knowledge Directory, synchronizing groups and users with external authentication sources, and maintaining the search collection.</p>
Document Repository Service	<p>The Document Repository Service stores content uploaded into the portal.</p>
Collaboration Web Services API	<p>This component allows developers to create, modify, and delete objects within Collaboration in response to events triggered by remote portlets and other enterprise applications.</p> <p>To use the Collaboration Web Services API, you must install the AquaLogic Interaction Development Kit (IDK). For detailed information on the IDK, including documentation and sample code, see the Developer Center.</p>

Recommended Configuration

The exact hardware configuration depends upon the size of your implementation among other factors. However, even in the smallest production environment, we strongly recommend that you install additional AquaLogic Interaction components, including Collaboration, on a separate machine from the portal and Image Service.

The following table shows a typical configuration:

Table 2-2 Recommended Configuration

Machine	Component
1: Portal Web Application Components	<ul style="list-style-type: none"> • Portal • Image Service • API Service
2: Additional Web Application Components	<ul style="list-style-type: none"> • Collaboration • Publisher • Studio • Portlets
3: Search and Indexing Components	<ul style="list-style-type: none"> • Automation Service • Search Service
4: Persistent Storage Components	<ul style="list-style-type: none"> • Document Repository Service • Portal Database • Collaboration Database

For more information on recommended configurations based on the size of your implementation, see the *Deployment Guide for BEA AquaLogic User Interaction* (Plumtree Application Suite).

Hardware and Software Requirements

The following table lists the software requirements for Collaboration. For hardware requirements, consult the *Deployment Guide for BEA AquaLogic User Interaction* (Plumtree Application Suite). For the most current platform support information, refer to the Interoperability Matrix which can be found by logging in to: <http://portal.plumtree.com>. Then navigate to the Product Center and click **Interoperability**.

Caution: IPv6 is not supported. You should verify that IPv6 is not enabled prior to installing this product.

Table 2-3 Hardware and Software Requirements

Component	Requirement
AquaLogic User Interaction Host Computer	<ul style="list-style-type: none"> • Microsoft Windows 2000 SP4, Microsoft Windows 2003 SP1 • Red Hat Enterprise Linux 3 Update 3 (ES & AS), on x86 • SUSE Enterprise Linux 9, on x86 • AIX 5.3, on POWER3, POWER4, POWER5 • Solaris 8 and 9, on SPARC
Database Server Host Computer	<ul style="list-style-type: none"> • Microsoft SQL Server 2000 SP3 (Windows only) • Oracle 9i (9.2.0.4) in default or Oracle RAC configuration • Oracle 10g (10.1.0.3) in default or Oracle RAC configuration
Portal	<ul style="list-style-type: none"> • Plumtree Foundation 6.0, Plumtree Foundation 6.0 SP1 • Plumtree Corporate Portal 5.0.4, 5.0.4J, 5.0.5, 5.0.5J <p>Note: References in this documentation to Plumtree Corporate Portal 5.0.x apply to Plumtree Corporate Portal 5.0.4/5.0.5/5.0.4J/5.0.5J.</p>
Browser	<ul style="list-style-type: none"> • Microsoft Internet Explorer, versions 5.5 and 6.x • Netscape 7.2 • Safari 1.2 (Mac) • Firefox 1.0 (and higher)
Groupware Servers	<ul style="list-style-type: none"> • Microsoft Exchange 2000 SP3 (and higher) • Microsoft Exchange 2003 • Lotus Notes 5.0.11
Required Software for Exchange Integration	<ul style="list-style-type: none"> • Microsoft.NET • Microsoft Web Services Enhancement
Microsoft Project	<ul style="list-style-type: none"> • Microsoft Project 2000 • Microsoft Project 2003

Note: Collaboration 4.1 contains a significant change in the deployment configuration for the product. Instead of installing the product, installing a separate application server, and

deploying a WAR file to the application server, Collaboration 4.1 is self-contained. It includes the runtime components needed for HTTP/HTTPS processing, and it no longer requires a separate application server. This change facilitates the product installation and maintenance.

Introduction

Overview - Installation and Upgrade

This chapter provides a high-level overview of the installation and upgrade procedures as well as references to other chapters and sections of this guide for more information. This chapter contains the following sections:

- [“Installing Collaboration on Windows” on page 3-2.](#)
- [“Upgrading Collaboration on Windows” on page 3-3.](#)
- [“Installing Collaboration on UNIX and Linux” on page 3-4.](#)
- [“Installing Microsoft Exchange Integration” on page 3-4.](#)
- [“Installing Collaboration on Multiple Systems - Silent Installation” on page 3-4.](#)

This overview assumes the following recommended network configuration:

- Collaboration and the Notification Service are installed on the same physical machine.
- The Image Service is installed on its own physical machine.
- The portal is installed on its own physical machine.

For more information on recommended configurations based on the size of your implementation, refer to the *Deployment Guide for BEA AquaLogic User Interaction* (Plumtree Application Suite).

Installing Collaboration on Windows

This section gives you an overview of the procedures required to perform a new installation of Collaboration on Windows.

To install Collaboration:

1. Verify that you have completed the pre-installation requirements and procedures outlined in [“Pre-Installation Procedures” on page 4-1](#). These include:
 - Verify the portal and required components are installed
 - Verify the portal database is installed
 - Create the Collaboration database

2. Run the installer on the machine where you want to install Collaboration. For information on using the installer, see [“Installing Collaboration on Windows” on page 4-1](#).

During this stage, install the following components:

- Collaboration
- Notification Service

For more information on choosing specific components during installation, see [“Choose Components” on page 4-4](#).

3. Run the installer on the machine where the Image Service is installed. For information on using the installer, see [“Installing Collaboration on Windows” on page 4-1](#).

During this stage, install the Image Service component.

For more information on choosing specific components during installation, see [“Choose Components” on page 4-4](#).

4. Perform the post-installation procedures outlined in [“Post Installation Procedures” on page -1](#). These include:

- Run the Collaboration scripts on the Collaboration database

These scripts create the necessary schema on the Collaboration database. You must run these scripts using the Collaboration database user ID.

- Run the Collaboration scripts on the portal database

These scripts create the necessary schema on the portal database. You must run these scripts using the portal database user ID.

- Configure Microsoft Exchange or Lotus Notes integration
- Configure the Publish to Portal feature

Upgrading Collaboration on Windows

If you are upgrading from a previous Windows version of Collaboration, this section provides an overview of the required procedures.

To upgrade Collaboration:

1. Verify that you have completed the pre-upgrade requirements and procedures outlined in [“Pre-Upgrade Procedures” on page 5-3](#). These include:
 - Verify the portal and required components are installed.
 - Verify the portal database is installed.
 - Configure the Collaboration database.
2. Run the installer on the machine where Collaboration is installed. For information on using the installer, see [“Running the Installer” on page 5-3](#).

During this stage, install the following components:

- Collaboration
- Notification Service

For more information on choosing specific components during installation, see [“Choose Components” on page 4-4](#).

3. Run the installer on the machine where the Image Service is installed. For information on using the installer, see [“Running the Installer” on page 5-3](#).

During this stage, install the Image Service.

For more information on choosing specific components during installation, see [“Choose Components” on page 4-4](#).

4. Perform the post-upgrade procedures outlined in [“Post-Upgrade Procedures” on page 5-4](#). These include:
 - Run the Collaboration scripts on the Collaboration database

These scripts create the necessary schema on the Collaboration database. You must run these scripts using the Collaboration database user ID.
 - Run the Collaboration scripts on the portal database

These scripts create the necessary schema on the portal database. You must run these scripts using the portal database user ID.

- Configure Microsoft Exchange or Lotus Notes integration
- Configure the Publish to Portal feature

Installing Collaboration on UNIX and Linux

For complete information on installing Collaboration on UNIX and Linux, see [“Installing Collaboration on UNIX or Linux” on page 6-1](#)

Installing Microsoft Exchange Integration

If you choose to install groupware integration using Microsoft Exchange, you must run the AquaLogic Interaction Exchange Remote API installer. For more information, see [“Installing the Exchange Remote API” on page 8-1](#). Refer to [“Configuring IIS” on page D-1](#) for information on IIS configuration.

Installing Collaboration on Multiple Systems - Silent Installation

When you are installing the Image Service or Notification Service on a different computer from the one where Collaboration is installed, you can use the silent properties file to import the values into the installer and install silently. The installer must be run once as a GUI to produce a properties file.

To run the installer silently using the silent properties file, go to a command line and execute:

```
<full_Path_To_Installer>/ALICollaboration_<version> -f  
<full_Path_To_Properties_File>/AquaLogicInteractionCollaboration_<version>.properties
```

For example:

```
<full_Path_To_Installer>/ALICollaboration_v4-1 - f  
<full_Path_To_Properties_File>/AquaLogicInteractionCollaboration_v4-1_silent.properties
```


Installing Collaboration on Windows

This chapter guides you through the Collaboration installer on Windows. To install Collaboration, you must have administration rights on the machine where you are running the installer. Additionally, you must have administrator privileges for the portal database.

If you have previously run the installer and a properties file has been created, you may run the installer silently based on the values in the file. Refer to [“Installing Collaboration on Multiple Systems - Silent Installation” on page 3-4](#) for information on how to run a silent install.

Refer to [“Configuring Advanced Collaboration Features” on page B-1](#) for instructions on how to make the Collaboration Office Tools Add-In installer available to end users.

Pre-Installation Procedures

If you plan to install Collaboration software on a Linux machine, skip to [“Installing Collaboration on UNIX or Linux” on page 6-1](#).

Before running the Collaboration installer on a Windows machine, you must:

1. Compile the necessary configuration and installation information by completing the installation worksheet provided in [“Installation Worksheet” on page A-1](#).
2. Verify that the portal is installed and configured correctly.

Verify that your portal is working correctly including the Search Service, Image Service, and Document Repository Service. For more information on installing and configuring AquaLogic Interaction, see the *Installation and Upgrade Guide for BEA AquaLogic Interaction (Windows)* (Plumtree Foundation). Verify that the portal database and its components are installed and configured correctly.

3. Create the Collaboration database.

We recommend that you create the Collaboration database before running the installer.

The Collaboration and portal databases must be the same vendor and version and they must reside on the same physical machine.

4. If you are going to integrate Collaboration with Microsoft Exchange, you must perform the following:

- a. Ensure the IIS server is running before you run the Exchange Remote API installer. Refer to “Configuring IIS” on page D-1 for information on IIS configuration.

- b. Install the Microsoft .NET 1.1 Framework.

This must be downloaded from the Microsoft Web site (<http://www.microsoft.com/>).

- c. Install Microsoft Web Services Enhancement 2.0.

This must be downloaded from the Microsoft Web site (<http://www.microsoft.com/>).

The .NET Framework and the Web Services Enhancement must be installed on the same machine running the groupware integration for Collaboration.

Creating a SQL Server Database

Before performing these steps, ensure that you have a SQL Server portal database that is working correctly. To complete these steps, you must be the database administrator for the portal database.

1. Ensure that the SQL Server Service Manager is running.

2. Open the SQL Server Enterprise Manager.

3. Create the Collaboration database:

- a. Select the database server where you want to create the Collaboration database.

- b. Right-click the database folder.

- c. Choose **New Database**.

- d. Enter a database name.

Note: Collaboration does not support case-sensitive database names.

- e. Click **OK**.

4. Add a login ID and password for the Collaboration database:
 - a. Open the **Security** folder.
 - b. Right-click the **Logins** folder and choose **New Login**.
 - c. Specify a user ID for the new user. This is the same user ID you will specify during the Collaboration installation.
 - d. In the Authentication area of this dialog box, choose **SQL Server Authentication** and type a password. You must specify this password during Collaboration installation.
 - e. In the **Defaults** area, set the default database to be the Collaboration database just created.
1. Click the **Database Access** tab. On this page, grant the current user access to and ownership of the Collaboration database.
 - a. In the **Specify which databases can be accessed by this login** box, select the Collaboration database.
 - b. In the **Database roles for '<Collaboration database>'** box, select **db_owner** (**public** is already selected) and click **OK**.
2. Close the Enterprise Manager.

Creating an Oracle Database

Before installing Collaboration ensure that you have a correctly installed and configured Oracle portal database. Collaboration does not use its own Oracle database. Instead, the Collaboration schema are added to the existing Oracle database that contains the portal schema.

Before proceeding with the Collaboration installation, confirm that the **open_cursors** parameter in the Oracle initialization file is set to greater than 1000. This parameter should have been set correctly during the portal database set up.

Running the Installer

To install Collaboration, you must have administrator rights on the machine where you are running the installer. Additionally, you must have administrator privileges for the portal database.

1. To run the Collaboration installer, locate and double-click the installation file:
ALICollaboration_v4-1.exe

2. Complete the installation wizard pages as described in the following table.

Table 4-1 Collaboration Installer Screens

Installer Screen	Description
Introduction	Provides general information on using the installer. Click Next to begin the installation.
License Agreement	To install Collaboration, you must read and accept the license agreement. After you have read the license agreement and selected the appropriate button, click Next .
Choose Components	<p>You can choose the Collaboration components you want to install. Each component can be installed on a separate server depending on your configuration.</p> <p>From the dropdown list you may choose All (Portal 6.0) or All (Portal 5.0.x) depending on which version of the portal you are running in conjunction with Collaboration 4.1.</p> <p>For information on recommended configuration, see “Recommended Configuration” on page 2-3.</p> <p>The Collaboration components are:</p> <ul style="list-style-type: none"> • Collaboration: This is the core Collaboration application. It is required. • Notification: This optional component sends e-mails from Collaboration to end-users. By subscribing to objects within Collaboration, you can receive notification when the object is updated. The Notification component is not required for users to employ the E-mail a Project and Groupware Integration features. However the E-mail a Project feature is less useful if the Notification Service is not running. • Image Service Files: This required component installs the necessary images, styles, and user interface controls, Java applets, and online help for Collaboration. Install Image Service Files on the same machine on which the portal’s Image Service is installed. • Document Repository (Portal 5.0.x only): This component is required for Collaboration 4.1 to operate with Plumtree Corporate Portal 5.0.x. It is recommended that this component be installed on the computer that is hosting the existing 5.0.x Document Repository Service. Installing this component does not overwrite the existing Document Repository Service. <p>After you have chosen the components you want to install, click Next.</p>
Installation Folder	<p>The default installation folder is C:\Program Files\plumtree.</p> <p>After you have entered the required information or accepted the default, click Next.</p>

Table 4-1 Collaboration Installer Screens

Installer Screen	Description
AquaLogic Interaction Collaboration - Application Port	<p>Select either http or https and enter the port number.</p> <p>After you have entered the required information, click Next.</p>
Portal Settings: Collaboration URL	<p>Collaboration URL: The URL the portal and Notification Service used to communicate with Collaboration. You must specify a fully-qualified domain name, including the port number and path.</p> <p>After you have entered the required information, click Next.</p>
Portal Settings: AquaLogic User Interaction Database	<p>Collaboration makes connections and retrieves information from the portal database. Select the appropriate vendor for your portal and Collaboration database, then click Next.</p>
Portal Settings: AquaLogic User Interaction Database (SQL Server)	<p>Collaboration uses the following information to establish connections with the portal database:</p> <ul style="list-style-type: none"> • AquaLogic User Interaction Database Host Computer: This is the hostname of the portal database server. You must specify a fully-qualified domain name. • AquaLogic User Interaction Database Port: The port the portal database uses to handle requests. • AquaLogic User Interaction Database Name: The name of the database configured to work with your portal. • AquaLogic User Interaction Database Login: The user name of the portal database owner. <p>After you have entered the required information, click Next.</p>
Portal Settings: AquaLogic User Interaction Database (Oracle)	<p>Collaboration uses the following information to establish connections with the portal database:</p> <ul style="list-style-type: none"> • AquaLogic User Interaction Database Host: This is the hostname of the portal database server. You must specify a fully-qualified domain name. • AquaLogic User Interaction Database Port: The port the portal database uses to handle requests. • AquaLogic User Interaction Database SID: The Windows service name of the portal database. • AquaLogic User Interaction Database Schema User: The user_id who is granted ownership of the portal schema and its tables. <p>After you have entered the required information, click Next.</p>

Table 4-1 Collaboration Installer Screens

Installer Screen	Description
Portal Settings: Authentication ID	<p>To establish secure communication between the portal and Collaboration, you must specify an authentication ID and password:</p> <ul style="list-style-type: none"> • Authentication ID: The portal uses the authentication ID to access resources on the machine which Collaboration is installed. • Authentication Password: This is the authentication password. This field cannot be left blank. <p>After you have entered the required information, click Next.</p>
Portal Settings: Document Repository Service	<p>The Document Repository Service is a portal component that manages storage and retrieval of documents for Collaboration and other AquaLogic Interaction products.</p> <ul style="list-style-type: none"> • Document Repository Service Host: The hostname of the Document Repository Service. You must specify a fully-qualified domain name. • Document Repository Service Port: The port the Document Repository Service uses to handle requests. If you chose the Document Repository (Portal 5.0.x only) option in the Choose Components installer screen, the default port is 8030. If you are running Collaboration on the 6.0 version of the portal, the default port is 8020. <p>If you chose the Document Repository (Portal 5.0.x only) option and you do not want to use the 8030 default, make sure that the port you assign is different than 8020.</p> <p>After you have entered the required information, click Next.</p>
Portal Settings: Search	<p>The Search Service is a component of the portal that provides search functionality to the portal and Collaboration. You must use the same hostname and port used by the portal.</p> <ul style="list-style-type: none"> • Search Host Computer: The hostname of Search Service. You must specify a fully-qualified domain name. • Search Port: The port that the Search Service uses to handle requests. The default value is 15244. <p>After you have entered the required information, click Next.</p>
Image Service URL	<ul style="list-style-type: none"> • Image Service URL: (This screen only appears if you chose to install the Image Service Files component) The URL of the Image Service. You must enter the full URL, including the domain name, port number, and path. <p>The Notification Service uses this URL to communicate with the Image Service.</p> <p>After you have entered the required information, click Next.</p>

Table 4-1 Collaboration Installer Screens

Installer Screen	Description
Portal Settings: Image Service Files	<ul style="list-style-type: none"> • Image Service Directory: This is the directory where the Image Service files are installed. <p>Note: Before clicking Next, ensure that security for the Image Service directory is appropriately configured to allow for installation of the Image Service files.</p> <p>After you have entered the required information, click Next.</p>
Collaboration: Database Connection (SQL Server)	<p>Enter the following configuration information for the Collaboration database:</p> <ul style="list-style-type: none"> • Collaboration Database Name: The database name for the Collaboration database. • Collaboration Database Login: The Collaboration database owner ID. • Collaboration Database Password: The Collaboration database password. <p>After you have entered the required information, click Next.</p>
Collaboration: Database Connection (Oracle)	<p>Enter the following configuration information for the Collaboration database:</p> <ul style="list-style-type: none"> • Collaboration Schema User: The user ID who is granted ownership of the portal schema and its tables. • Collaboration Schema Password: The password of the Collaboration database schema user. <p>After you have entered the required information, click Next.</p>

Table 4-1 Collaboration Installer Screens

Installer Screen	Description
Collaboration: Advanced Features	<p>You can install the following optional advanced features of Collaboration:</p> <p>Bulk Upload: This feature allows you to simultaneously upload multiple files and folders to Collaboration.</p> <p>This feature uses a Java applet installed on the client's computer which requires the Java Runtime Environment. To use this feature, certain client browser security settings must be made. See “Configuring Advanced Collaboration Features” on page B-1 for more information on client changes that must be made after installing Collaboration.</p> <p>WebDAV Service: The Web-based Document Authoring and Versioning (WebDAV) protocol is an extension to the HTTP protocol that allows easier document management.</p> <p>WebDAV must be installed to use the WebEdit and Map a Web Folder features. For more information on these features see “Configuring Advanced Collaboration Features” on page B-1.</p> <p>Microsoft Exchange Integration: This option allows users to synchronize personal Collaboration calendars with their Microsoft Exchange calendar to use Groupware Integration features. For more information, see “Configuring Groupware Integration” on page B-4.</p> <p>If you choose this option, the installer checks that the following have been installed:</p> <ul style="list-style-type: none"> • Microsoft Internet Information Server (IIS) • Microsoft .NET Framework • Microsoft Web Server Enhancement (WSE) <p>These components must be installed before running the installer. For more information, see “Introduction” on page 2-1</p> <p>Note: Groupware Integration is not required for users to employ the E-mail a Project feature. For more details on the E-mail a Project feature, see <i>Administrator Guide for BEA AquaLogic Interaction Collaboration</i>.</p>

Table 4-1 Collaboration Installer Screens

Installer Screen	Description
	<p>We recommend that you install the groupware remote API on the same physical machine where Collaboration is installed.</p> <p>Lotus Notes Integration: This option allows users to synchronize personal Collaboration calendars with their Lotus notes calendar to use Groupware Integration features.</p> <p>If you install this feature, you must perform several configuration steps after Collaboration is installed. For more information, see “Configuring Groupware Integration” on page B-4.</p> <p>No Groupware Integration: Choose this option if you do not want to allow groupware integration.</p> <p>Note: If you do not choose to install groupware integration now, you must re-run the installer to install it later.</p> <p>Note: Groupware Integration is not required for users to employ the E-mail a Project feature. For more details on the E-mail a Project feature, see <i>Administrator Guide for BEA AquaLogic Interaction Collaboration</i>.</p> <p>After you have chosen the features you want to install, click Next.</p>
Collaboration: Exchange Remote API URL	<p>The URL that the Exchange Remote API uses to communicate with Collaboration. The default value is:</p> <p>http://[machine]/GroupwareService/GroupwareService.asmx</p> <p>After you have entered the required information or accepted the default, click Next.</p>
Notification: Connection Settings	<p>Notification Host: The hostname of the Notification Service.</p> <p>Notification Port: The port where the Notification Service listens for requests. The default value is 9887.</p> <p>After you have entered the required information, click Next.</p>

Table 4-1 Collaboration Installer Screens

Installer Screen	Description
Notification: e-mail Server Settings	<p>To configure the Notification Service, enter the following:</p> <ul style="list-style-type: none"> • Mail Server Host: The location of the mail server for your site. • Notification E-mail Address: This is the e-mail address used to send Collaboration notifications. • Notification E-mail Name: This is the notification e-mail name that appears in the “From” field of notification e-mails. <p>Note: The e-mail address specified here will receive a copy of every e-mail notification sent. You may want to create an e-mail account to receive these notifications.</p> <ul style="list-style-type: none"> • SMTP Server supports e-mail relaying: Select this check box if your SMTP server supports e-mail relaying. • SMTP Domain List: If your SMTP server does not support relaying, clear the SMTP Server supports e-mail relaying check box, and list valid e-mail domains in a comma-delimited list. <p>After you have entered the required information, click Next.</p>
Collaboration: e-mail a Project	<p>Specify whether or not you want to enable e-mailing a project. If you enable this feature, you must supply an e-mail domain and port for Collaboration to use to receive e-mail messages. The default port number is 25.</p> <p>After you have entered the required information, click Next.</p> <p>Note: For instructions on how to configure the E-mail a Project feature, see <i>Administrator Guide for BEA AquaLogic Interaction Collaboration</i>.</p>
Pre-Installation Summary	<p>This screen provides a summary of the installation information you have provided in the installer. After you have reviewed this information and are satisfied with the values you have provided, click Install.</p>
Install Complete	<p>This screen appears after the installer has finished. You must reboot the system before continuing to the post-installation procedures.</p> <p>After you have made a selection, click Finish.</p>

You should perform the following immediately after the installer has completed:

1. Restart the computer.
2. Proceed to the next section to continue installing Collaboration

Post-Installation Procedures

This section describes the procedures you must perform after running the Collaboration installer. You should perform the procedures outlined in each section in the order listed below:

1. [Configuring the Portal and Collaboration Databases](#)
2. Restart the portal
3. [Importing the Collaboration Migration Package](#)
4. [Starting the Notification Service](#)
5. [Configuring Optional Collaboration Features](#)
6. [Starting Collaboration](#)

Configuring the Portal and Collaboration Databases

After you have completed the installer you must configure the portal and Collaboration databases.

Configuring MS SQL Server

This section describes how to configure the Collaboration database using SQL Server. The following scripts add and configure the Collaboration schema in the portal database:

Table 4-2 Scripts for Creating and Configuring a Collaboration SQL Server Database

Script Function	Name	Database / ID
Configure Collaboration database schema	collaboration-server-create-tables.sql collaboration-server-data.sql collaboration-server-portal-role-grant.sql	Collaboration database / Collaboration database ID
Configure portal database schema	portal-collaboration-server-role-grant.sql portal-collaboration-server-role-grant-5.0.4.sql portal-collaboration-server-data.sql	portal database / portal database user ID

The scripts are located in:

<PT_Home>\plumtree\ptcollab\4.1\sql\6.0\MSSQLServer

For **Plumtree Corporate Portal 5.0.x only**, the scripts are located in:

```
<PT_Home>\plumtree\ptcollab\4.1\sql\5.0\MSSQLServer
```

These scripts create the Collaboration-specific tables and information in the Collaboration database. They also grant rights to access necessary tables in the portal database to the Collaboration database owner.

The following procedures show you how to run these scripts:

1. Run Query Analyzer.
2. Connect to SQL Server and log in using the Collaboration Server database user ID specified when the database was created.
3. Select the Collaboration Server database.

4. Open and run **collaboration-server-create-tables.sql**.

This script attempts to drop tables from the database before adding new ones.

5. Open and run **collaboration-server-data.sql**.

This script adds configuration information for the Collaboration database.

6. Open and run **collaboration-server-portal-role-grant.sql**.

This script grants the portal database user SELECT access to the Collaboration tables.

7. Connect to the portal database as the portal database user.

8. Open and run **portal-collaboration-server-role-grant.sql**.

For **Plumtree Corporate Portal 5.0.x only**, open and run **portal-collaboration-server-role-grant-5.0.4.sql**.

This script grants the Collaboration database user SELECT access to the portal database tables.

9. Open and run **portal-collaboration-server-data.sql**.

This script adds configuration information for the portal database.

10. Close Query Analyzer.

Configuring Oracle

This section describes how to configure the Collaboration database using Oracle. The following scripts add and configure the Collaboration schema in the portal database:

Table 4-3 Scripts for Creating and Configuring a Collaboration Oracle Database

Script Function	Name	Database / ID
Create Collaboration database schema	collaboration-server-create-table-space.sql collaboration-server-create-user.sql	Collaboration database / Collaboration database ID
Configure Collaboration database schema	collaboration-server-create-tables.sql collaboration-server-data.sql collaboration-server-portal-role-grant.sql	Collaboration database / Collaboration database ID
Configure portal database schema	portal-collaboration-server-role-grant.sql portal-collaboration-server-role-grant- 5.0.4 .sql portal-collaboration-server-data.sql	portal database / portal database user ID

These SQL scripts create the Collaboration schema and add specific tables and information. They also grant SELECT access to the Collaboration schema owner.

Note: If you are running the scripts on a local machine you do not need to include the command line `@<Oracle_SID>`, however you do need to ensure that the environment variables are set.

The following procedures describe how to run these scripts:

1. Perform the following on the portal database server:
 - Create the directory `%ORACLE_HOME%/ptcollabscripts`.
 - Copy the Collaboration database scripts from the installation location into this folder.
2. Update any required database patches.
3. If you are installing in a production environment, set up the database to archive log files. Using the default configuration, you must shut down the Oracle database to get a read-consistent backup.
4. If you want, you can change the names and locations of the `COLLAB_TEMP` and `COLLAB_DATA` tablespaces by modifying the

collaboration-server-create-table-space.sql script. We recommend having at least two SCSI hard drives. Put each tablespace on its own hard drive.

5. By default, the Collaboration schema user name is *collab*, and the password is *collab*. You can change the schema user name and password by modifying the **collaboration-server-create-user.sql** script.
6. Use **sql*plus** to execute **collaboration-server-create-table-space.sql**. This script creates the Collaboration schema default tablespaces.

You must log in as the system user to execute this script. Substitute the correct system password in the following command:

```
sqlplus system/<system_pwd>@<ORACLE_SID>  
@collaboration-server-create-table-space.sql
```

7. As the system user, execute **collaboration-server-create-user.sql**. This script creates the user and password you specified during Collaboration installation. The script prompts you to enter the password again; be sure to enter the correct password.

```
sqlplus system/<system_pwd>@<ORACLE_SID>  
@collaboration-server-create-user.sql
```

8. As the Collaboration Server user, execute **collaboration-server-create-tables.sql** to create Collaboration tables. Substitute the correct Oracle user name and password; this is the user name and password you specified during Collaboration installation:

```
sqlplus <collab_user_name>/<user_pwd>@<ORACLE_SID>  
@collaboration-server-create-tables.sql
```

Note: This script stops immediately on a SQL error. If this happens, the problem should be resolved and the script rerun.

9. As the Collaboration user, execute **collaboration-server-data.sql** to populate the Collaboration tables. Substitute the correct Oracle user name and password; this is the user name and password you specified during Collaboration installation:

```
sqlplus <collab_user_name>/<user_pwd>@<ORACLE_SID>  
@collaboration-server-data.sql
```

10. As the Collaboration user, execute **collaboration-server-portal-role-grant.sql**. This script grants the portal schema user SELECT access to required tables in the Collaboration schema. Substitute the correct Oracle user name and password; this is the user name and password you

specified during Collaboration Server installation. The script prompts for other required passwords.

```
sqlplus <collab_user_name>/<user_pwd>@<ORACLE_SID>
@collaboration-server-portal-role-grant.sql
```

11. As the portal user, execute **portal-collaboration-server-role-grant.sql**. This script grants the Collaboration schema user SELECT access to required tables in the portal schema. Substitute the correct portal database user name and password in the following command. The script prompts for other required passwords.

```
sqlplus <portal_user_name>/<portal_pwd>@<ORACLE_SID>
@portal-collaboration-server-role-grant.sql
```

For **Plumtree Corporate Portal 5.0.x only**, execute **portal-collaboration-server-role-grant-5.0.4.sql**.

12. As the portal user, execute **portal-collaboration-server-data.sql**. This script creates views in the portal schema that allow it to see Collaboration tables. Substitute the correct portal database user name and password in the command:

```
sqlplus <portal_user_name>/<portal_pwd>@<ORACLE_SID>
@portal-collaboration-server-data.sql
```

Importing the Collaboration Migration Package

For **Plumtree Foundation 6.0**, import the Collaboration using the Migration Wizard as follows.

1. Log on to the portal as a user who has administrative rights.
2. Click the **Administration** tab.
3. In the **Select Utility** drop-down, select **Migration-Import** and accept the defaults.
4. In the Migration Package area, go to File Path.
5. Click Browse to find the **.pte** file: **Collaboration6.pte**.
6. Click **Open**.
7. Click **Load Package**.
8. If you are upgrading from an earlier version of Collaboration and have changed the port number that Collaboration runs on, check **Overwrite Remote Servers**.

9. Click **Finish**.
10. A pop up dialog displays asking if you want to import. Click **Yes**.
11. The Collaboration folder is viewable in the Admin Objects Directory.
12. Click the Collaboration folder to check for the following objects:
 - Content Source
 - Group
 - Portlet
 - Property
 - Remote Server
 - Web Service

For **Plumtree Corporate Portal 5.0.x**, import the Collaboration using the Migration Wizard as follows.

1. **Start | Programs | Plumtree | Migration Wizard**.
2. Enter the portal administrator password.
3. Select **Portal Server Object Migration**, then click **Next**.
4. Select **Import**, then click **Next**.
5. Select **Overwrite existing Remote Server objects**, then click **Next**.
6. Browse to `ptcollab\4.1\serverpackages\5.0`.
7. Select the **Collaboration5.ptc** file.
8. Click **Open**.
9. Click **Next** and then **Next** again.
10. Click **Migrate**.

Configuring Optional Collaboration Features

The following optional features require additional configuration and setup after you have run the installer:

- Personal Projects
- Bulk Upload
- Groupware Integration
- Publish to Knowledge Directory

For more information on configuring these features, see [“Configuring Advanced Collaboration Features” on page B-1](#).

Starting the Notification Service

To start the Notification service:

1. **Start | Programs | Administrative Tools | Services**
2. Locate and then right-click the Notification service and select **Start**.

Starting Collaboration

To start Collaboration:

1. Reboot the computer where Collaboration is installed if you have not done so since running the installer.
2. Start the Windows service named **BEA AquaLogic Interaction Collaboration**.
3. To verify that Collaboration is functioning correctly, access the Collaboration Diagnostics page using the following URL:

`http://<your-collab-URL>:<your-collab-port>/collab/admin/diagnostic`

For more information on using the Collaboration Diagnostics page, see [“Troubleshooting” on page 9-1](#).

Starting Document Repository Service (5.0.x only)

To start the Document Repository service:

1. **Start | Programs | Administrative Tools | Services**
2. Locate and then right-click the **Plumtree Collaboration Document Repository** service and select **Start**.

Collaboration Logging

For AquaLogic Interaction 6.x, you have the option to set up Collaboration Logging. This includes setting up Logging Utilities and configuring ALI Logging Spy (formerly “Plumtree Logging Spy”) to display Collaboration messages. For more information on setting up Collaboration Logging, refer to the *Administrator Guide for BEA AquaLogic Interaction Collaboration*.

Upgrading Collaboration on Windows

This chapter discusses how to upgrade from previous versions of Collaboration to Collaboration 4.1 SP2. The upgrade procedures assume that you are running either Plumtree Foundation 6.0 SP1 or Plumtree Corporate Portal 5.0.x. The sections and steps that are specific to 5.0.x are prefaced with **Plumtree Corporate Portal 5.0.x only**.

This chapter discuss is divided into the following sections:

- Upgrade Paths
- Pre-Upgrade Procedures
- Running the Installer
- Post-Upgrade Procedures

Upgrade Paths

The following table summarizes upgrade paths and upgrade documentation:

Table 5-1 Windows Upgrade Paths

Upgrade Path	Upgrade References
4.1 SP1 to 4.1 SP2	Run the installer according to the procedures in “Installing Collaboration on Windows” on page 4-1 .
4.1 to 4.1 SP2	Run the installer according to the procedures in “Installing Collaboration on Windows” on page 4-1 .
4.0.2 to 4.1 SP2	<p>Run the pre-upgrade procedures outlined in “Pre-Upgrade Procedures” on page 5-3.</p> <p>Run the installer according to the procedures in “Installing Collaboration on Windows” on page 4-1.</p> <p>Note: You must also upgrade the Notification Service and Image Service when running the installer.</p> <p>Run the post-upgrade procedures outlined in “Post-Upgrade Procedures” on page 5-4.</p>
4.0 to 4.1	<p>Run the pre-upgrade procedures outlined in “Pre-Upgrade Procedures” on page 5-3.</p> <p>Run the installer according to the procedures in “Installing Collaboration on Windows” on page 4-1.</p> <p>Note: You must also upgrade the Notification Service and Image Service when running the installer.</p> <p>Run the post-upgrade procedures outlined in “Post-Upgrade Procedures” on page 5-4.</p>
3.x to 4.1	<p>If you are currently on Collaboration Server version 3.x you must upgrade to version 4.0.2 before upgrading to version 4.1.</p> <p>Refer to the <i>Installation Guide for Plumtree Collaboration Server 4.0.2</i> for information on this upgrade path.</p>
2.x to 4.1	<p>To upgrade from Collaboration Server 2.x, you must first upgrade to version 3.x, then upgrade to version 4.0.2, before upgrading to version 4.1.</p> <p>Refer to the <i>Installation Guide for Plumtree Collaboration Server 3.0</i> for information on this upgrade path.</p>

Pre-Upgrade Procedures

This section describes the procedures you must perform before running the Collaboration installer. You must follow these procedures in the following order:

1. Backup the portal and Collaboration databases.

This allows you to recover your data if there is a problem during installation. For more information see your database documentation.

2. Stop the Notification Service.

This allows the Windows service to be updated.

Running the Installer

After you have completed the pre-installation procedures:

1. Copy the installer files to the directory where you have installed the old versions of the Collaboration files.

This allows the installer to use the silent properties file created by previous installations. For more information on using the silent properties file, see [“Silent Properties File” on page C-1](#)

Note: The 4.1 version of Collaboration cannot point to a pre-Foundation 6.0 Document Repository. Review the silent properties file carefully for those new Foundation 6.0 components which may have different ports.

2. On the machine hosting the previous version of Collaboration, run the installer and choose the following components:
 - Collaboration
 - Notification Service

If your portal version is 5.0.x, you will also need to choose:

- Document Repository

For step-by-step details on running the installer, see [“Installing Collaboration on Windows” on page 4-1](#).

3. On the machine where you installed the previous version of the Image Service, run the installer and choose the following component:
 - Image Service

Note: Install Image Service Files on the same machine on which the portal's Image Service is installed.

For step-by-step details on running the installer, see [“Installing Collaboration on Windows” on page 4-1](#).

4. Reboot the machine where Collaboration is installed.

Post-Upgrade Procedures

This section describes the procedures you must perform after running the Collaboration installer. You must perform these procedures in the following order:

1. Upgrade the Collaboration database.

The following sections describe the procedures for updating the portal and Collaboration databases. You must upgrade both the Collaboration database and the portal database. Both databases must reside on the same computer. In this step, the first section discusses upgrading database using Oracle; the second section discusses upgrading databases using Microsoft SQL Server.

UPGRADING DATABASES USING ORACLE

Assuming that you installed the Collaboration files in the default location, the Oracle upgrade script files are located on the Collaboration computer in one of the following folders:

For Foundation 6.0:

```
<PT_HOME>\ptcollab\4.1\sql\6.0\Oracle\OracleNT9.2
```

```
<PT_HOME>\ptcollab\4.1\sql\6.0\Oracle\OracleNT10
```

For Plumtree Corporate Portal 5.0.x:

```
<PT_HOME>\ptcollab\4.1\sql\5.0\Oracle\OracleNT9.2
```

```
<PT_HOME>\ptcollab\4.1\sql\5.0\Oracle\OracleNT10
```

Perform the following to upgrade the Collaboration and portal databases:

- a. Copy the Collaboration database upgrade scripts from the default installation location to an Oracle folder or subdirectory on the computer where the database resides.

- b. Configure the database to archive log files if you are upgrading in a production environment.
- c. Shut down the database to get a read-consistent backup.
- d. Using SQLPlus and the Collaboration database server schema user ID and password, run the following: **collaboration-server-4-0-2-to-4-1-0-upgrade.sql**;
collaboration-server-4.1.1-to-4.1.2-upgrade.sql;
collaboration-server-portal-role-grant.sql.
- e. Using SQLPlus and the portal database server schema user ID and password, run the following: **portal-collaboration-server-data.sql**;
portal-collaboration-server-role-grant.sql; **portal-collaboration-server-upgrade.sql**.

UPGRADING DATABASES USING MICROSOFT SQL SERVER

Assuming that you installed the Collaboration files in the default location, the MS SQL Server 2000 upgrade script files are located on the Collaboration computer in the following folder:

For Foundation 6.0:

```
<PT_HOME>\ptcollab\4.1\sql\6.0\MSSQLServer
```

For Corporate Portal 5.0.x:

```
<PT_HOME>\ptcollab\4.1\sql\5.0\MSSQLServer
```

The following scripts upgrade and configure the portal and Collaboration database.

Perform the following to upgrade the Collaboration and portal databases:

- a. Run **Query Analyzer**.
- b. Connect to SQL Server and log in using the Collaboration database user ID and password.
- c. Select the Collaboration database.
- d. Open and run **collaboration-server-4-0-2-to-4-1-0-upgrade.sql**.
- e. For **Plumtree Corporate Portal 5.0.x** and **Plumtree Foundation 6.0** open and run **collaboration-server-portal-role-grant.sql**.
- f. Connect to SQL Server and log in using the portal database user ID and password.
- g. Select the portal database.

- h. Open and run **portal-collaboration-server-data.sql**.
- i. Open and run **portal-collaboration-server-role-grant.sql**.
- j. Open and run **portal-collaboration-server-upgrade.sql**.
- k. If you need to update Collaboration UUIDs, using the portal database server schema user ID and password, run the following: **portal-collaboration-upgrade-uuids.sql**.
- l. Close Query Analyzer.

Note: The following steps 2 through 8 must be run regardless of database type.

2. For Plumtree Foundation 6.0, import the Collaboration Migration Package using the Migration Utility. This ensures that the paths to the portlets are upgraded to the new version.
 - a. Log on to the portal as a user who has administrative rights.
 - b. Click the **Administration** tab.
 - c. In the **Select Utility** drop-down, select **Migration-Import** and accept the defaults.
 - d. In the Migration Package area, go to **File Path**.
 - e. Click Browse to find the **Collaboration6.ptc** file. If you accepted installation defaults, the package is located:
`<PT_HOME\ptcollab\4.1\serverpackages\6.0`
 - f. Click **Open**.
 - g. Click **Load Package**.
 - h. If you are upgrading from an earlier version of Collaboration and have changed the port number that Collaboration runs on, check **Overwrite Remote Servers**.
 - i. Click **Finish**.
 - j. A pop up dialog displays asking if you want to import. Click **Yes**.
 - k. The Collaboration folder is viewable in the Admin Objects Directory.
 - l. Click the Collaboration folder to check for the following objects: Content Source; Group; Portlet; Remote Server; Property; Web Service.

For Plumtree Corporate Portal 5.0.x, import the Collaboration Migration Package using the Migration Wizard as follows.

- a. **Start | Programs | Plumtree | Migration Wizard.**
 - b. Enter the portal administrator password.
 - c. Select **Portal Server Object Migration**, then click **Next**.
 - d. Select **Import**, then click **Next**.
 - e. Select **Overwrite existing Remote Server objects**.
 - f. Browse to `ptcollab\4.1\serverpackages\5.0.`
 - g. Select the **Collaboration5.pte** file.
 - h. Click **Open**.
 - i. Click **Next** and then **Next** again.
 - j. Click **Migrate**.
 - k. Restart Collaboration.
3. If you have set Collaboration to manually capture portal gateway values you must change the WebService ID being used. It must be set to the WebService ID of the Notification Gateway Entry.
 4. Configure optional Collaboration features.

For more information on configuring these features, see [“Configuring Advanced Collaboration Features” on page B-1](#).
 5. Restart the portal.
 6. Start the Notification Service.
 7. Start Collaboration.

To verify that Collaboration is functioning correctly, perform the following:

- a. Reboot the computer where Collaboration is installed if you have not done so since running the installer.
- b. Restart the Windows service named **BEA AquaLogic Interaction Collaboration**.

- c. Restart the Windows service named **BEA AquaLogic Interaction Collaboration Notification**.

- d. If your portal is **5.0.x**, start the Collaboration Document Repository Service.

- e. Access the Collaboration Diagnostics page using the following URL:

`http://<your-collab-URL>:<your-collab-port>/collab/admin/diagnostic`

For more information on using the Collaboration Diagnostics page, see
[“Troubleshooting” on page 9-1](#).

8. Rebuild the Search Collection

After restarting Collaboration, perform the following steps to rebuild the search collection:

- a. Log on to the portal computer as a portal administrator.
- b. Click **Administration**.
- c. Choose the **Collaboration Administration** utility.
- d. Click **Search Service**.
- e. Click **Rebuild Search Collection**.
- f. Click **OK**.

Installing Collaboration on UNIX or Linux

This chapter provides information on Collaboration and summarizes the procedures required to perform new product installations on a Unix or Linux machine.

This chapter is divided into the following sections:

- Pre-installation Procedures
- Running the Installer
- Post-installation Procedures

For more information on recommended configurations based on the size of your implementation, see the *Deployment Guide for BEA AquaLogic User Interaction* (Plumtree Application Suite).

Pre-Installation Procedures

Before running the Collaboration installer, you must:

1. Compile the necessary configuration and installation information by completing the installation worksheet provided in [“Installation Worksheet” on page A-1](#).
2. Verify that your portal is installed and configured correctly.

Verify that your portal is working correctly including the Search Service, Image Service, Document Repository Service, API Service, Automation Service, and ALI Logging Utilities. For more information on installing and configuring the portal, see the *Installation and Upgrade Guide for BEA AquaLogic Interaction (UNIX and Linux)* (Plumtree Foundation).

- 3. Verify that the portal database and its components are installed and configured correctly.
- 4. Create the Collaboration database. Note that Collaboration for Linux only supports Oracle.

Before installing Collaboration ensure that you have a correctly installed and configured Oracle portal database. Collaboration does not use its own Oracle database. Instead, the Collaboration schema are added to the existing Oracle database that contains the portal schema.

Before proceeding with the Collaboration installation, confirm that the **open_cursors** parameter in the Oracle initialization file is set to greater than 1000. This parameter should have been set correctly during the portal database set up.

Running the Installer

To install Collaboration, you must have administrator rights on the machine where you are running the installer. Additionally, you must have administrator privileges for the portal database.

To run the Collaboration installer:

- 1. Enter the following command lines to locate the installer:

```
cd <installer_file_path>
./ALICollaboration_v4-1
```

- 2. Complete the installation wizard pages as described in the following table.

Table 6-1 Collaboration Installer Screens

Installer Screen	Description
Introduction	Provides general information on using the installer. Click Next to begin the installation.
License Agreement	To install Collaboration, you must read and accept the license agreement. After you have read the license agreement and selected the appropriate button, click Next .

Table 6-1 Collaboration Installer Screens

Installer Screen	Description
Choose Components	<p data-bbox="454 392 1227 505">You can choose the Collaboration components you want to install. Each component can be installed on a separate server depending on your configuration. For information on recommended configuration, see “Recommended Configuration” on page 2-3.</p> <p data-bbox="454 522 791 545">The Collaboration components are:</p> <ul data-bbox="454 562 1227 678" style="list-style-type: none"> • Collaboration: This is the core Collaboration application. It is required. • Notification: This optional component sends e-mails from Collaboration to end-users. By subscribing to objects within Collaboration, you can receive notification when the object is updated. <p data-bbox="454 704 1227 756">Note: The Notification component is not required for users to employ the E-mail a Project and Groupware Integration features.</p> <ul data-bbox="454 774 1227 1034" style="list-style-type: none"> • Image Service Files: This required component installs the necessary images, styles, user interface controls, Java applets, and on-line help for Collaboration. Install Image Service Files on the same machine on which the portal’s Image Service is installed. • Document Repository (Portal 5.0.x only): This component is required for Collaboration 4.1 to operate with Plumtree Corporate Portal 5.0.x. It is recommended that this component be installed on the computer that is hosting the existing 5.0.x Document Repository Service. Installing this component does not overwrite the existing Document Repository Service. <p data-bbox="454 1052 1130 1074">After you have chosen the components you want to install, click Next.</p>
Installation Folder	<p data-bbox="454 1109 908 1131">The default installation folder is /opt/plumtree</p> <p data-bbox="454 1149 764 1171">Click Next to accept the default.</p>
AquaLogic Interaction Collaboration - Application Port	<p data-bbox="454 1206 973 1229">Select http or https. The default port number is 11930.</p> <p data-bbox="454 1246 764 1269">Click Next to accept the default.</p>
Portal Settings: Collaboration URL	<ul data-bbox="454 1312 1227 1399" style="list-style-type: none"> • Collaboration URL: The URL the Portal and Notification Service use to communicate with Collaboration. You must specify a fully-qualified domain name, including the port number and path. <p data-bbox="454 1416 1032 1439">After you have entered the required information, click Next.</p>

Table 6-1 Collaboration Installer Screens

Installer Screen	Description
Portal Settings: AquaLogic User Interaction Database	<p>Collaboration uses the following information to establish connections with the portal database:</p> <ul style="list-style-type: none"> • AquaLogic User Interaction Database Host: This is the hostname of the portal database server. You must specify a fully-qualified domain name. • AquaLogic User Interaction Database Port: The port the portal database uses to handle requests. • AquaLogic User Interaction Database SID: The Oracle Service ID of the portal database. • AquaLogic User Interaction Database Schema User: The user_id who is granted ownership of the portal schema and its tables. <p>After you have entered the required information, click Next.</p>
Portal Settings: Authentication ID	<p>To establish secure communication between the portal and Collaboration, you must specify an authentication ID and password:</p> <ul style="list-style-type: none"> • Authentication ID: The portal uses the authentication ID to access resources on the machine on which Collaboration is installed. • Authentication Password: This is the authentication password. This field cannot be left blank. <p>After you have entered the required information, click Next.</p>
Portal Settings: Document Repository Service	<p>The Document Repository Service is a portal component that manages storage and retrieval of documents for Collaboration and other AquaLogic Interaction products.</p> <ul style="list-style-type: none"> • Document Repository Service Host: The hostname of the Document Repository Service. You must specify a fully-qualified domain name. • Document Repository Service Port: The port the Document Repository Service uses to handle requests. If you chose the Document Repository (Portal 5.0.x only) option in the Choose Components installer screen, the default port is 8030. If you are running Collaboration on the 6.0 version of the portal, the default port is 8020. <p>If you chose the Document Repository (Portal 5.0.x only) option and you do not want to use the 8030 default, make sure that the port you assign is different than 8020.</p> <p>After you have entered the required information, click Next.</p>

Table 6-1 Collaboration Installer Screens

Installer Screen	Description
Portal Settings: Search	<p>Search is a component of the portal that provides search functionality to the Document Repository Service and Collaboration. You must use the same hostname and port used by the portal.</p> <ul style="list-style-type: none"> • Search Host: The hostname of Search uses. You must specify a fully-qualified domain name. • Search Port: The port Search uses to handle requests. The default value is 15244. <p>After you have entered the required information, click Next.</p>
Image Service URL	<ul style="list-style-type: none"> • Image Service URL: (This screen only appears if you chose to install the Image Service Files component) The URL of the Image Service. You must enter the full URL, including the domain name, port number, and path. <p>The Notification Service uses this URL to communicate with the Image Service.</p> <p>After you have entered the required information, click Next.</p>
Portal Settings: Image Service Files	<ul style="list-style-type: none"> • Image Service Directory: This is the directory where the Image Service files are installed. For example: /opt/plumtree/ptimages <p>Note: Before clicking Next, ensure that security for the Image Service directory is appropriately configured to allow for installation of the Image Service files.</p> <p>After you have entered the required information, click Next.</p>
Collaboration: Database Connection	<p>Enter the following configuration information for the Collaboration database:</p> <ul style="list-style-type: none"> • Collaboration Schema User: The user ID who is granted ownership of the Collaboration schema and its tables. • Collaboration Schema Password: The password of the Collaboration database schema user. <p>After you have entered the required information, click Next.</p>

Table 6-1 Collaboration Installer Screens

Installer Screen	Description
Collaboration: Advanced Features	<p>You can install the following optional advanced features of Collaboration:</p> <p>Bulk Upload: This feature allows you to simultaneously upload multiple files and folders to Collaboration.</p> <p>This feature uses a Java applet installed on the client's computer which requires the Java Runtime Environment. To use this feature, certain client browser security settings must be made. See “Configuring Advanced Collaboration Features” on page B-1 for more information on client changes that must be made after installing Collaboration.</p> <p>WebDAV Service: The Web-based Document Authoring and Versioning (WebDAV) protocol is an extension to the HTTP protocol that allows easier document management.</p> <p>WebDAV must be installed to use the WebEdit and Map a Web Folder. For more information on these features see “Configuring Advanced Collaboration Features” on page B-1.</p>
Collaboration: Advanced Features	<p>Microsoft Exchange Integration: Windows Only; Do Not Select.</p> <p>Lotus Notes Integration: This option allows users to synchronize personal Collaboration calendars with their Lotus notes calendar.</p> <p>If you install this feature, you must perform several configuration steps after Collaboration is installed. For more information, see “Configuring Advanced Collaboration Features” on page B-1.</p> <p>No Groupware Integration: Choose this option if you do not want to allow groupware integration.</p> <p>Note: Groupware Integration is not required for users to employ the E-mail a Project feature. For more details on the E-mail a Project feature, see <i>Administrator Guide for BEA AquaLogic Interaction Collaboration</i>.</p> <p>Note: If you do not choose to install groupware integration now, you must re-run the installer to install it later.</p> <p>After you have chosen the features you want to install, click Next.</p>
Notification: Connection Settings	<p>Notification Host: The hostname of the Notification Service.</p> <p>Notification Port: The port where the Notification Service listens for requests. The default value is 9887.</p> <p>After you have entered the required information, click Next.</p>

Table 6-1 Collaboration Installer Screens

Installer Screen	Description
Notification: e-mail Server Settings	<p>To configure the Notification Service, enter the following:</p> <ul style="list-style-type: none"> • Mail Server Host: The location of the mail server for your site. • Notification E-mail Address: This is the e-mail address used to send Collaboration notifications. • Notification E-mail Name: This is the notification e-mail name that appears in the “From” field of notification e-mails. <p>Note: The e-mail address specified here will receive a copy of every e-mail notification sent. You may want to create an e-mail account to receive these notifications.</p> <ul style="list-style-type: none"> • SMTP Server Supports E-mail Relaying: Select this check box if your SMTP server supports e-mail relaying. • SMTP Domain List: If your SMTP server does not support relaying, clear the SMTP Server supports e-mail relaying check box, and list valid e-mail domains in a comma-delimited list. <p>After you have entered the required information, click Next.</p>
Collaboration: e-mail a Project	<p>Specify whether or not you want to enable e-mailing a project. If you enable this feature, you must supply an e-mail domain and port for Collaboration to use to receive e-mail messages. The default port number is 25.</p> <p>Note: For details on the capabilities of and instructions on how to configure the E-mail a Project feature, see <i>Administrator Guide for BEA AquaLogic Interaction Collaboration</i>.</p>
Pre-Installation Summary	<p>This screen provides a summary of the installation information you have provided in the installer. After you have reviewed this information and are satisfied with the values you have provided, click Install.</p>
Install Complete	<p>This screen appears after the installer has finished.</p> <p>After you have made a selection, click Finish.</p>

Post-Installation Procedures

The following steps should be performed immediately after the installer has completed. This section describes the procedures you must perform after running the Collaboration installer. You should perform the procedures outlined in each section in the order listed below:

1. [“Configuring the Portal and Collaboration Databases” on page 6-8.](#)
2. Restart the portal.
3. [“Importing the Collaboration Migration Package” on page 6-10.](#)
4. [“Starting the Notification Service” on page 6-11.](#)
5. [“Configuring Optional Collaboration Features” on page 6-12.](#)
6. [“Starting Collaboration” on page 6-12.](#)

Configuring the Portal and Collaboration Databases

After you have completed the installer you must configure the portal and Collaboration databases.

This section describes how to configure the Collaboration database using Oracle. The following scripts add and configure the Collaboration schema in the portal database:

Table 6-2 Scripts for Configuring the Portal and Collaboration Databases

Script Function	Name	Database / ID
Create Collaboration database schema	collaboration-server-create-table-space.sql collaboration-server-create-user.sql	portal database / Collaboration database ID
Configure Collaboration database schema	collaboration-server-create-tables.sql collaboration-server-data.sql collaboration-server-portal-role-grant.sql	portal database / Collaboration database ID
Configure portal database schema	portal-collaboration-server-role-grant.sql portal-collaboration-server-data.sql	portal database / portal database user ID

These SQL scripts create the Collaboration schema and add specific tables and information. They also grant SELECT access to the Collaboration schema owner.

Note: If you are running the scripts on a local machine you do not need to include the command line `@<Oracle_SID>` however you do need to ensure that the environment variables are set.

The following procedures describe how to run these scripts:

1. Perform the following on the portal database server:
 - Create the directory `$ORACLE_HOME/ptcollabscripts`.

- Copy the Collaboration database scripts from the installation location into this folder.
- 2. Update any required database patches.
- 3. If you are installing in a production environment, set up the database to archive log files. Using the default configuration, you must shut down the Oracle database to get a read-consistent backup.
- 4. If you want, you can change the names and locations of the `COLLAB_TEMP` and `COLLAB_DATA` tablespaces by modifying the **collaboration-server-create-table-space.sql** script. We recommend having at least two SCSI hard drives. Put each tablespace on its own hard drive.
- 5. By default, the Collaboration schema user name is *collab*, and the password is *collab*. You can change the schema user name and password by modifying the **collaboration-server-create-user.sql** script.
- 6. Use **sql*plus** to execute **collaboration-server-create-table-space.sql**. This script creates the Collaboration schema default tablespaces.

You must log in as the system user to execute this script. Substitute the correct system password in the following command:

```
sqlplus system/<system_pwd>@<ORACLE_SID>
@collaboration-server-create-table-space.sql
```

- 7. As the system user, execute **collaboration-server-create-user.sql**. This script creates the user and password you specified during Collaboration installation. The script prompts you to enter the password again; be sure to enter the correct password.

```
sqlplus system/<system_pwd>@<ORACLE_SID>
@collaboration-server-create-user.sql
```

- 8. As the Collaboration user, execute **collaboration-server-create-tables.sql** to create Collaboration tables. Substitute the correct Oracle user name and password; this should be the schema user name and password created by `collaboration_server_create_user.sql`

```
sqlplus <collab_user_name>/<user_pwd>@<ORACLE_SID>
@collaboration-server-create-tables.sql
```

Note: This script stops immediately on a SQL server error. If this happens, resolve the problem and rerun the script.

9. As the Collaboration user, execute **collaboration-server-data.sql** to populate the Collaboration tables. Substitute the correct Oracle user name and password; this should be the schema user name and password created by **collaboration_server_create_user.sql**:

```
sqlplus <collab_user_name>/<user_pwd>@<ORACLE_SID>  
@collaboration-server-data.sql
```

10. As the Collaboration user, execute **collaboration-server-portal-role-grant.sql**. This script grants the portal schema user SELECT access to required tables in the Collaboration schema. Substitute the correct Oracle user name and password; this should be the schema user name and password created by **collaboration_server_create_user.sql**. The script prompts for other required passwords.

```
sqlplus <collab_user_name>/<user_pwd>@<ORACLE_SID>  
@collaboration-server-portal-role-grant.sql
```

11. As the portal user, execute **portal-collaboration-server-role-grant.sql**. This script grants the Collaboration schema user SELECT access to required tables in the portal schema. Substitute the correct portal database user name and password in the following command. The script prompts for other required passwords.

```
sqlplus <portal_user_name>/<portal_pwd>@<ORACLE_SID>  
@portal-collaboration-server-role-grant.sql
```

12. As the portal user, execute **portal-collaboration-server-data.sql**. This script creates views in the portal schema that allow it to see Collaboration tables. Substitute the correct portal database user name and password in the command:

```
sqlplus <portal_user_name>/<portal_pwd>@<ORACLE_SID>  
@portal-collaboration-server-data.sql
```

Importing the Collaboration Migration Package

The following steps outline how to use the Migration Utility to import the Collaboration Migration Package into Collaboration:

1. Log on to the portal as a user who has administrative rights.
2. Click the **Administration** tab.
3. In the **Select Utility** drop-down, select **Migration-Import** and accept the defaults.
4. In the Migration Package area, go to File Path.

5. Click Browse to find the .pte file appropriate to your portal version:
 - Collaboration5.pte
 - Collaboration6.pte
6. Click **Open**.
7. Click **Load Package**.
8. Click **Finish**.
9. A pop up dialog displays asking if you want to import. Click **Yes**.
10. The Collaboration folder is viewable in the Admin Objects Directory.
11. Click the Collaboration folder to check for the following objects:
 - Data Source
 - Group
 - Portlet
 - Remote Server
 - User
 - Web Service

Starting the Notification Service

To start the Notification Service you must first log in as the Portal Administrator, then access the start scripts which are located in:

plumtree/ptnotification/4.1/bin/notificationserverd.sh

To run the script use **notificationserverd.sh start** and to stop the script use **notificationserver.sh stop**

This script executes the Notification Service in the background and can be incorporated into the Linux environment startup scripts if necessary.

Check the **notification.log** file for errors. This file is found in the **/plumtree/ptnotification/4.1/settings/logs** directory.

Configuring Optional Collaboration Features

The following optional features require additional configuration and setup after you have run the installer:

- Personal Projects
- Bulk Upload
- Groupware Integration
- Publish to Knowledge Directory

For more information on configuring these features, see [“Configuring Advanced Collaboration Features” on page B-1](#).

Starting Collaboration

To start Collaboration:

1. Run the **ptcollaborationserverd.sh** script with the **start** argument. This script is found in the **/plumtree/ptcollab/4.1/bin** directory.

2. To verify that Collaboration is functioning correctly, access the Collaboration Diagnostics page using the following URL:

```
http://<your-collab-URL>:<your-collab-port>/collab/admin/diagnostic
```

For more information on using the Collaboration Diagnostics page, see [“Troubleshooting” on page 9-1](#)

3. Check the **collaboration.log** file for any errors. This file is found in the **/plumtree/ptcollab/4.1/settings/logs** directory.

Collaboration Logging

For AquaLogic Interaction 6.x, you have the option to set up Collaboration Logging. This includes setting up Logging Utilities and configuring ALI Logging Spy (formerly “Plumtree Logging Spy”) to display Collaboration messages. For more information on setting up Collaboration Logging, refer to the *Administrator Guide for BEA AquaLogic Interaction Collaboration*.

Upgrading Collaboration on UNIX and Linux

This chapter discusses how to upgrade from previous versions of Collaboration to Collaboration 4.1.

The following table summarizes upgrade paths and upgrade documentation:

Table 7-1 UNIX and Linux Upgrade Paths

Upgrade Path	Upgrade References
4.1 SP1 to 4.1 SP2	Run the installer according to the procedures in “Installing Collaboration on UNIX or Linux” on page 6-1 .
4.1 to 4.1 SP2	Run the installer according to the procedures in “Installing Collaboration on UNIX or Linux” on page 6-1 .

Table 7-1 UNIX and Linux Upgrade Paths

4.0.2 to 4.1	<p>Run the pre-upgrade procedures outlined in “Pre-Upgrade Procedures” on page 7-2.</p> <p>Run the installer according to the procedures in “Installing Collaboration on UNIX or Linux” on page 6-1.</p> <p>Note: You must also upgrade the Notification Service and Image Service when running the installer.</p> <p>Run the post-upgrade procedures outlined in “Post-Upgrade Procedures” on page 7-3.</p>
2.x to 4.1	<p>To upgrade from Collaboration Server 2.x, you must first upgrade to version 3.x, then upgrade to version 4.0.2, before upgrading to version 4.1. Collaboration 3.x was released only on Windows. The installation of 3.x must take place on a Windows machine.</p> <p>Refer to the <i>Installation Guide for Plumtree Collaboration Server 3.0</i> for information on this upgrade path.</p>

Pre-Upgrade Procedures

This section describes the procedures you must perform before running the Collaboration installer. You must follow these procedures in the following order:

1. Backup the portal and Collaboration databases.

This allows you to recover your data if there is a problem during installation. For more information see your database documentation.
2. Stop the Notification Service, Search Service and Automation Service.

Running the Installer

After you have completed the pre-installation procedures:

1. Copy the installer files to the directory where you have installed the old versions of the Collaboration files.

This allows the installer to use the silent properties file created by previous installations. For more information on using the silent properties file, see [“Silent Properties File” on page C-1](#).

Note: The 4.1 version of Collaboration cannot point to a pre-Foundation 6.0 Document Repository. If you are running Plumtree Corporate Portal 5.0.x, you will need to install the 6.0 Document Repository as instructed in step 2. Review the silent properties file carefully for those new AquaLogic Interaction G6 components which may have different ports.

2. On the machine where you installed the previous version of Collaboration, run the installer and choose the following components:
 - Collaboration
 - Notification Service

If you are running Plumtree Corporate Portal 5.0.x, also install the Document Repository component at this time.

For step-by-step details on running the installer, see [“Installing Collaboration on UNIX or Linux” on page 6-1](#).

3. On the machine where you installed the previous version of the Image Service, run the installer and choose the following component:
 - Image Service

Note: Install Image Service Files on the same machine on which the portal’s Image Service is installed.

For step-by-step details on running the installer, see [“Installing Collaboration on UNIX or Linux” on page 6-1](#).

Post-Upgrade Procedures

This section describes the procedures you must perform after running the Collaboration installer. You must perform these procedures in the following order:

1. Upgrade the Collaboration database.

The following sections describe the procedures for updating the portal and Collaboration databases. You must upgrade both the Collaboration database and the portal database. Both databases must reside on the same computer.

Before you run the SQL scripts described below, you must upgrade the portal to version 6.x. For more information, see the *Installation and Upgrade Guide for BEA AquaLogic*

Interaction (UNIX and Linux) (Plumtree Foundation). Before upgrading, ensure that both databases are working correctly and you have access to them.

Upgrading Databases Using Oracle

Assuming that you installed the Collaboration files in the default location, the Oracle upgrade script files are located on the Collaboration computer in one of the following folders:

```
$PT_HOME/ptcollab/4.1/sql/6.0/Oracle/OracleUnix9.2
```

```
$PT_HOME/ptcollab/4.1/sql/6.0/Oracle/OracleUnix10
```

Perform the following to upgrade the Collaboration and portal databases:

- a. Copy the Collaboration database upgrade scripts from the default installation location to an Oracle folder or subdirectory on the computer where the database resides.
 - b. Ensure that you have installed the latest Oracle patches.
 - c. Configure the database to archive log files if you are upgrading in a production environment.
 - d. Shut down the database to get a read-consistent backup.
 - e. Using SQLPlus and the Collaboration database server schema user ID and password, run **collaboration-server-4-0-2-to-4-1-0-upgrade.sql**. Then run **collaboration-server-4.1.1-to-4.1.2-upgrade.sql**. Then run **collaboration-server-portal-role-grant.sql**.
 - f. Using SQLPlus and the portal database server schema user ID and password, run **portal-collaboration-server-data.sql**. Then run **portal-collaboration-server-role-grant.sql**. Then run **portal-collaboration-server-upgrade.sql**.
2. Import the Collaboration Migration Package using the Migration Utility. This ensures that the paths to the portlets are upgraded to the new version. The following instructions are for Foundation 6.0. For a 5.0.x portal, import **Collaboration5.ptc** found in `<PT_HOME>/ptcollab/4.1/serverpackages/5.0`.
 - a. Log on to the portal as a user who has administrative rights.
 - b. Click the **Administration** tab.
 - c. In the **Select Utility** drop-down, select **Migration-Import** and accept the defaults.

- d. In the Migration Package area, go to **File Path**.
 - e. Click Browse to find the **Collaboration6.ptc** file, located in
`<PT_HOME\ptcollab\4.1\serverpackages\6.0`
 - f. Click **Open**.
 - g. Click **Load Package**.
 - h. If you are upgrading from an earlier version of Collaboration and have changed the port number that Collaboration runs on, check **Overwrite Remote Servers**.
 - i. Click **Finish**.
 - j. A pop up dialog displays asking if you want to import. Click **OK**.
 - k. The Collaboration folder is viewable in the Admin Objects Directory.
 - l. Click the Collaboration folder to check for the following objects: Content Source; Group; Portlet; Remote Server; Property; Web Service.
3. If you have set Collaboration to manually capture portal gateway values you must change the Web Service ID being used. It must be set to the WebService ID of the Notification Gateway Entry, which can be found in Collaboration Administration's Portal Access page.
 4. Configure optional Collaboration features.
 For more information on configuring these features, see [“Configuring Advanced Collaboration Features” on page B-1](#).
 5. Restart the portal.
 6. Start the Notification Service.
 7. Start Collaboration.
 8. If your portal is 5.0.x, start the G6 Document Repository you installed in Step 2.
 9. To verify Collaboration is running, access the Collaboration Diagnostics page using the following URL:

`http://<your-collab-URL>:<your-collab-port>/collab/admin/diagnostic`

For more information on using the Collaboration Diagnostics page, see [“Troubleshooting” on page 9-1](#)

10. Rebuild the Search Collection. After restarting Collaboration, perform the following steps to rebuild the search collection:
 - a. Log on to the portal computer as a portal administrator.
 - b. Click **Administration**.
 - c. Choose the **Collaboration Administration** utility.
 - d. Click **Search Service**.
 - e. Click **Rebuild Search Collection**.
 - f. Click **OK**.

Installing the Exchange Remote API

This chapter outlines the procedures required to install the AquaLogic Interaction Exchange Remote API. The Exchange Remote API uses a separate installer that allows you to install this component on a different machine than Collaboration. You can run the installer before or after the Collaboration installer.

Starting the Installer

To run the Collaboration installer, locate and double-click the installation file:

ALIEExchangeRemoteAPI_v1-0.exe

Note: This installer is available only for Windows.

Completing the Installer

Complete the following installer screens:

Table 8-1 Exchange Remote API Installer Screens

Installer Screen	Description
Introduction	Provides general information on using the installer. Click Next to begin the installation.
License Agreement	To install Collaboration, you must read and accept the license agreement. After you have read the license agreement and selected the appropriate button, click Next .
Installation Folder	Click Choose to change the installation folder. Click Next to continue.
Select IIS Website	Choose whether to deploy to the default IIS Web Site. Click Next to continue.
Specify IIS Website Information	<p>IIS Website Name: The URL of the IIS server.</p> <p>Note: If you are installing the Exchange Remote API before running the Collaboration installer, you will need to enter the same value you enter when installing Collaboration.</p> <p>IIS Website Port: The port where the IIS server listens for requests.</p> <p>Note: You must ensure that the Collaboration Web application and the IIS virtual directory used by groupware integration are running on different ports.</p> <p>IIS Website Secure Port: The port where the IIS server listens for secure requests.</p> <p>After you have entered the required information, click Next.</p>
Pre-Installation Summary	Display this installation folder and disk space requirements for the installation.
Install Complete	After the installer has finished, you must restart the system to complete the installation.

Troubleshooting

This chapter lists common problems that may occur during Collaboration installation.

Table 9-1 Collaboration Installation Problems, Causes, and Solutions

Document Content Does Not Appear	
Problem	In the installed Collaboration, the list of documents in a project appears, but you cannot access the document links.
Cause	<p>Either the path to the Document Repository Service is incorrect or the port associated with the Document Repository Service is incorrect.</p> <p>This Document Repository Service information was provided during the Collaboration installation. The Document Repository Service software was installed during the portal installation.</p>

Table 9-1 Collaboration Installation Problems, Causes, and Solutions

Solution	<p>Edit the dr.xml file to provide the correct Document Repository Service URL.</p> <p>You can find the dr.xml file in the following folder in the Collaboration installation path:</p> <p>...ptcollab\4.1\settings\config</p> <p>Change the <url> entry in the dr.xml file to reflect the correct path and port number for the Document Repository Service.</p> <p>To verify that the Document Repository Service is up and running, go to the Windows Command Prompt. Type the following command:</p> <pre>>Telnet <Document_Repository_computer> <port_number></pre> <p>If the Windows Command Prompt displays a blank screen with no errors, the Document Repository Service is up and running.</p>
Portlets Time Out	
Problem	<p>When you start Collaboration, the portlets time out and time-out errors display.</p> <p>These errors are most likely to occur when you start up Collaboration the first time after it is installed.</p>
Cause	The Java Server Pages (.jsp pages) in your application server were not precompiled before you started Collaboration for the first time.
Solution	<p>The Collaboration portlets need to be refreshed.</p> <p>Refresh the page. If you are running Collaboration for the first time, you might need to refresh the page a couple of times, because the .jsp pages are compiled when Collaboration is first accessed.</p>
Portlets Do Not Load	
Problem	When you start up Collaboration, the Collaboration portlets do not start or fail to preload on startup. Various errors might display.

Table 9-1 Collaboration Installation Problems, Causes, and Solutions

Cause 1	The Web application server is not up and running.
Solution 1	Restart the Windows service named Collaboration. Wait for two or three minutes to allow the application server to start, then refresh the page.
Cause 2	<p>The port used to access the Web application server is incorrect.</p> <p>The port for the Web application server was provided with the Collaboration Information (URL) during installation.</p>
Solution 2	<p>Follow these steps:</p> <ol style="list-style-type: none">1. In the Portal, click the Administration tab.2. Click the Collaboration administrative folder.3. Click Remote Server.4. Click the Collaboration remote server.5. Check that the base URL for Collaboration is correct. This URL should include the following information: <pre>http://<Collab_Server_computer_name>: <Application_Server_port>/collab</pre> <p>where:</p> <p><Collab_Server_computer_name> is the name of the computer on which Collaboration is installed.</p> <p><Application_Server_port> is the port number used by your application server.</p>
Cause 3	A database exception occurred. For example, the application server cannot connect to the database.
Solution 3	Open the collaboration.log log file and look for any exceptions.

Table 9-1 Collaboration Installation Problems, Causes, and Solutions

Cause 4	An exception occurred in the application server that resulted in Collaboration failing to start up. In the application server log file, a “failed to preload on startup” error displays.
Solution 4	Restart the Windows service named BEA AquaLogic Interaction Collaboration .
Cause 5	The pthome.xml file is not configured properly.

Table 9-1 Collaboration Installation Problems, Causes, and Solutions

Solution 5	<ul style="list-style-type: none">• Open the pthome.xml file, located in the portal installation folder. (For example, this folder can be C:\Program Files\plumtree.)• In the pthome.xml file, find the entry for Collaboration. The following example shows the entries for Collaboration and its component Notification Service: <pre><product name="collab"> <install version="4.1"> <path>D:\Program Files\plumtree\ptcollab\4.1</path> <configpath>\settings\confi g</configpath> </install> </product> <product name="collab_notification"> <install version="3.0"> <path>D:\Program Files\plumtree\ptnotification\ 4.1</path> <configpath>\settings\confi g</configpath> </install> </product></pre>• In this entry in the pthome.xml file, verify that the path to the Collaboration configuration directory is correct; if it is not, edit it and save the file.• Restart the server.
A Database Role-Reconciliation Error Occurs	
Problem	A database role-reconciliation error occurs, and Collaboration cannot connect to the database.

Table 9-1 Collaboration Installation Problems, Causes, and Solutions

Cause	<p>During the Collaboration installation, the wrong portal user name was specified as owner of the portal database and its tables.</p> <p>This information was specified in the Portal Database Information install panel. For a SQL Server database, the panel requested the name of the database owner. For an Oracle database, the panel requested the schema/user name.</p> <p>The portal user should be the owner of the portal database and its tables (SQL Server) or portal schema and its tables (Oracle).</p>
Solution	<p>Open the database.xml file, located in the following directory on your Collaboration computer:</p> <pre><Collab_Server_Installation>\ptcollab\4.1\settings\config</pre> <p>In the database.xml file, the portal user that owns the portal tables is identified in the following line:</p> <pre><linked-database-alias>plumdb.dbo.</linked-database-alias></pre> <p>Enter the correct portal user name and save the file.</p>
Error 400 Page from Notify	
Problem	Links from Notify mail return an Error 400 page.
Cause	This occurs when the portal and Collaboration are running on the same port on the same machine.
Solution	Ensure that Collaboration and portal are running on different ports or on different machines.
Grant Rights and Portal vs System User	
Problem	If you use SQL Plus through Enterprise Manager, grant rights scripts fail.

Table 9-1 Collaboration Installation Problems, Causes, and Solutions

Cause	The Collaboration or portal user does not have the proper grant rights.
Solution	If using Enterprise Manager, run grant rights scripts as an Oracle system user rather than a portal user.

Troubleshooting

Installation Worksheet

This appendix contains a worksheet for entering the installation information required by Collaboration. Print this worksheet and use it to gather the host computer, portal, and database information you need to install Collaboration.

Table A-1 Installation Worksheet

Property	Example	Value
Installation Folder	C:\Program Files\plumtree\	
Collaboration - Application Port	11930	
Collaboration URL	http://[machine.domain]:11930/collab/	
Portal Database (SQL Server)		
• Portal Database Host Computer	host.mycompany.com	
• Portal Database Port	1433	
• Portal Database Name	plumdb	
• Portal Database Login	plumdbuser	
Portal Database (Oracle)		
• Portal Database Host	portaldb.mycompany.com	
• Portal Database Port	1521	

Table A-1 Installation Worksheet

Property	Example	Value
• Portal Database SID	plumdb	
• Portal Database Schema User	plumdbuser	
Authentication ID		
• Authentication ID	authenticationid	
• Authentication Password	mypassword	
Document Repository Service		
• Document Repository Service Host	docrep.mycompany.com	
• Document Repository Service Port	8020	
Portal Settings: Search		
• Search Host Computer	srchsrv.yourcompany.com	
• Search Port	15244	
Image Service		
• Image Service URL	http://host.mycompany.com/ima geserver	
• Image Service Directory	C:\Program Files\plumtree\ ptimages	
Collaboration Database (SQL Server)		
• Collaboration Database Name	collabdb	
• Collaboration Database Login	collabdbuser	
• Collaboration Database Password	mysecurepwd	
Collaboration Database (Oracle)		

Table A-1 Installation Worksheet

Property	Example	Value
• Collaboration Schema User	collabdbuser	
• Collaboration Schema Password	mysecurepwd	
Collaboration URL	http://host.mycompany.com/collab	
Notification Service		
• Notification Service Host	notesrv.mycompany.com	
• Notification Service Port	9887	
• Mailserver Host	mail.mycompany.com	
• Notification E-mail Address	user@mycompany.com	
• Notification E-mail Name	User	

Installation Worksheet

Configuring Advanced Collaboration Features

This appendix outlines the procedures required to install and configure advanced Collaboration features.

Making the Collaboration Office Tools Add-In Installer Available to End Users

The Collaboration Office Tools Add-In lets end users choose from several check-in options and type additional check-in comments. The Add-In dialog appears after users edit and close a document either from WebEdit or within the Web folder on their personal computer.

The Collaboration Office Tools Add-In must be installed on the machine of each user who may want to use the Add-In. WebEdit, however, still functions correctly without the installation of the Add-In. You can either push out the Add-In's installer to your users or have them download it.

To push out the installer to end users, use the .msi file appropriate to your language:

- ALICollaborationOfficeTools.msi (English and other European languages)
- ALICollaborationOfficeTools_ja (Japanese)
- ALICollaborationOfficeTools_ko (Korean)
- ALICollaborationOfficeTools_zh (Chinese)
- ALICollaborationOfficeTools_zh-tw (Traditional Chinese)

All .msi files are located in:

```
<ImageService>/plumtree/collab/private/applets
```

To make the installer available to be downloaded by end users, set the **docman.webEdit.installOfficeToolsPopUp.enabled** parameter in **config.xml** to **yes**.

The installer, **ALICollaborationOfficeTools.exe**, is located in:

```
<ImageService>/plumtree/collab/private/applets
```

Enabling Personal Projects

The personal projects feature allows users to create and maintain their own personal project. A personal project contains documents, task list, note, and calendar features. After this feature is enabled, personal projects are not created in Collaboration until a user selects their personal project link from the My Project portlet.

To enable this feature:

1. Click the **Administration** tab.
2. Select the **Collaboration Administration** utility.
3. Click **Miscellaneous Settings**.
4. Select **Enable personal projects**.

After you have performed these steps, you must grant the correct activity rights to the groups you want to allow to use this feature:

1. Click the **Administration** tab.
2. Select the **Activity Manager** utility.
3. Click **Own Collaboration Personal Project**.
4. Click **Add Group**.
5. Select the groups you want to add.
6. Click **OK**.
7. Click **Finish**.

Note: The **Own Collaboration Personal Project** activity right also allows users to map Web folders to Collaboration projects. For more information, see the *Administrator Guide for BEA AquaLogic Interaction Collaboration*.

Enabling Bulk Upload

The Bulk Upload feature allows users to upload multiple documents or to copy a folder hierarchy from a local machine to Collaboration. To enable this feature:

1. If you did not choose to enable the Bulk Upload feature during installation, you must edit **config.xml** and set the **bulkUpload.enabled** element to **yes**.

Alternatively, you may enable Bulk Upload by using the Collaboration Administration utility.

- a. Click the **Administration** tab.
 - b. Select the **Collaboration Administration** utility.
 - c. Click **Miscellaneous Settings**.
 - d. Click **Enable bulk upload**.
2. Grant the corresponding activity rights by performing the following:
 - a. Click the **Administration** tab.
 - b. Select the **Activity Manager** utility.
 - c. Click **Enable bulk upload**.
 - d. Click **Add Group**.
 - e. Select the groups you want to add.
 - f. Click **OK**.
 - g. Click **Finish**.

Client Requirements for Using Bulk Upload

This section describes the client settings required to use the Bulk Upload feature. After Bulk Upload has been enabled, the following software must be installed on the client machine:

- Java Runtime Environment (JRE), version 1.4 or greater
- Java Plug-in, version 1.4 or greater
- The Bulk Upload Applet

When a user attempts to use the Bulk Upload feature, the browser verifies if the Java Runtime Environment and the Java Plug-in are installed. If they are not, the user will be prompted to download and install them.

If they are installed, the Java Plug-in attempts to load the Bulk Upload applet. If the applet is not found, it is downloaded from the Image Service. The user is then prompted to trust the applet. Users should answer “Always” when prompted to trust the applet.

For more information on configuring Bulk Upload, see the *Administrator Guide for BEA AquaLogic Interaction Collaboration*.

Configuring Groupware Integration

Collaboration allows you to integrate either a Microsoft Exchange or Lotus Domino groupware server. For more information on which groupware servers are supported, see “[Hardware and Software Requirements](#)” on page 2-4. The Groupware Integration feature lets users:

- Access items on a groupware calendar using the My Calendar portlet
- Create appointments and meeting requests
- Synchronize a Collaboration calendar with a groupware calendar

For complete information on configuring and administering groupware integration, see the *Administrator Guide for BEA AquaLogic Interaction Collaboration*.

Note: Groupware Integration is not necessary for users to employ the E-mail a Project feature. For more details on the E-mail a Project feature, see *Administrator Guide for BEA AquaLogic Interaction Collaboration*.

The following initial procedures are required to configure groupware integration:

1. Edit **config.xml** or use the Collaboration Administration utility to enable Groupware Server integration.

The following fields in **config.xml** are required to enable groupware integration. These fields are configured by the Collaboration installer. The application server running Collaboration must be restarted for changes to **config.xml** to take effect.

Note: The groupware-specific elements of the user interface will not appear until you have configured at least one groupware server.

Table B-1 config.xml fields for Groupware Integration

Field	Description
groupware.enabled	This field enables or disables groupware integrations. Its valid values are: <ul style="list-style-type: none"> • yes: enables groupware integration • no: disables groupware integration
groupware.type	This field sets the backend server type. The valid values for this field are: <ul style="list-style-type: none"> • exchange: sets the server type to Microsoft Exchange. • notes: sets the server type to Domino.
groupware.soapServerURL	This is the URL to the Exchange Remote API. This setting is only used with Microsoft Exchange. For information on installing this component, see “Installing the Exchange Remote API” on page 8-1

2. Configure a groupware server:
 - a. Click the **Administration** tab.
 - b. Select the **Collaboration Administration** utility.
 - c. Click **Groupware Servers**.
 - d. Click **Add Server**.
 - e. Enter the configuration information.

If you are using Exchange, enter the following:

Table B-2 Collaboration Administration Exchange Integration

Field	Description
Server Name/IP/URL	The server name, IP address, or URL of the groupware server. Note: If you are upgrading Collaboration, you should use the value of the serverURL element in the 3.x version of the configuration file and add the http:// protocol prefix. Example: http://mail.company.com/exchange
Alias	An optional descriptive name for this groupware server.

If you are using Lotus Domino, enter the following:

Table B-3 Collaboration Administration Lotus Domino Integration

Field	Description
Server Name/IP/URL	The server name, IP address, or URL of the groupware server. Note: If you are upgrading Collaboration, you should use the value of the serverURL element in the 3.x version of the configuration file and add the http:// protocol prefix. Example: mail.company.com/notes
Alias	An optional descriptive name for this groupware server, which will be available to end users. Example: MyCompany Notes Server
Server Port	If your server port number is other than 80, type a port number; otherwise leave this blank.
Proxy Host/Firewall Port	If you are using a proxy server or a firewall, type the host name; otherwise leave this blank.
Use SSL	If you are using https, select the check box.
HTTPS Port	If you are using an https port number other than 443, type the port number; otherwise leave this blank.

Table B-3 Collaboration Administration Lotus Domino Integration

Session Based Authentication	If you are using form-based authentication (cookies), select this; if you are using basic authentication, clear the check box.
Notes Server Temp Dir	Type the local directory of the Lotus Domino server that stores the attachments.
Notes Server Temp UNC	Type the UNC path of the directory of the Lotus Domino server that stores the attachments. This should be the same directory that you typed in the Notes Server Temp Dir text box. For example: \\<Lotus Domino server name>\<folder name>.

3. User account setup

In order to use groupware integration, each user must perform the following steps to configure their account:

- a. Log in to the portal.
- b. Click **My Account**.
- c. Click **Collaboration Settings**.
- d. Click **Calendar Synchronization**.
- e. Enter the required connection information.
- f. Click **Finish**.

Configuring Publish to Knowledge Directory

To configure the Publish to Knowledge Directory feature:

1. Click the **Administration** tab
2. Select the **Collaboration Administration** utility.
3. Click **Publish to Directory**.
4. Click **Configure a Content Source**.
5. Choose **Collaboration KD**.

This data source is pre-configured when the **Collaboration6.ptc** file is loaded into the portal.

6. Click **OK**.

For further information on configuring Collaboration for importing files into the Knowledge Directory refer to the *Administrator Guide for BEA AquaLogic Interaction Collaboration*.

Enabling WebEdit

WebEdit simplifies the process of editing a document in Collaboration. Using this feature a user can edit a Microsoft Office document “in-place,” without having to perform check-ins, check-outs, uploads, and downloads.

The WebEdit feature is implemented using the WebDAV protocol. If you chose this optional component during installation, the Collaboration installer installs the WebDAV protocol and sets values specific to WebEdit in the configuration files. For more information on configuring WebEdit see the *Administrator Guide for BEA AquaLogic Interaction Collaboration*.

To use WebEdit, an end user’s browser must **not** be configured to disable Microsoft ActiveX controls.

The Collaboration Office Tools Add-In must be installed on the machine of each user who wants to use the Add-In (WebEdit, however, still functions correctly without the installation of the Add-In). You can either push out the Add-In’s installer to your users or have them download it. For details on making the Collaboration Office Tools Add-In Installer available to end users, see [“Making the Collaboration Office Tools Add-In Installer Available to End Users”](#) on page B-1

Enabling Map a Web Folder

The Map a Web Folder feature allows a user to map a Network Place on their personal computer running Microsoft Windows to the document hierarchy in Collaboration. This allows the user to view the document hierarchy using Windows Explorer. Folders and files on Collaboration appear as folders and files in Explorer.

This feature is implemented using the WebDAV protocol. If you chose this optional component during installation, the Collaboration installer installs the WebDAV protocol and sets the values specific to the Map a Web Folder feature in the configuration files. For more information on configuring the Map a Web Folder feature see the *Administrator Guide for BEA AquaLogic Interaction Collaboration*.

Granting Activity Rights

You must grant the correct activity rights to the groups you want to allow to use the Map a Web Folder feature:

1. Click the **Administration** tab.
2. Select the **Activity Manager** utility.
3. Click **Bulk Upload to Collaboration**.
4. Click **Add Group**.
5. Select the groups you want to add.
6. Click **OK**.
7. Click **Finish**.

Mapping a Folder

This section describes the procedures an end-user must perform to use the Map a Web Folder feature. You should perform these procedures to test this feature before rolling-out a production version of Collaboration.

1. Select a project you want to map to a Web folder.
2. Click the **Documents** tab.
3. Select **New |Web Folder**.
4. Map the Web Folder.

To Map a Web Folder in Windows 2000:

- a. Copy the URL in the **Web Folder Location** text box.
- b. Open **My Network Places** on your desktop.
- c. Double-click **Add Network Place**. The **Add Network Place** wizard appears.
- d. In the **Type the location of the Network Place** text box, paste the URL; then click **Next**.
- e. If prompted, enter your name and password, then click **OK**.
- f. In the **Enter a name for this Network Place** text box, type a name, then click **Finish**.

A new network place is created and Collaboration is now mapped on Windows Explorer.

To Map a Web Folder in Windows XP:

- a. Copy the URL in the **Web Folder Location** text box.
- b. Open **My Network Places** on your desktop.
- c. Double-click **Add Network Place**. The **Add Network Place** wizard appears.
- d. Click **Next**.
- e. Select **Choose another network location**.
- f. In the **Internet or network address** text box, paste the URL; then click **Next**.
- g. If prompted, enter your name and password, then click **OK**.
- h. In the **Type a name for this network place** text box, type a name, then click **Finish**.

A new network place is created and Collaboration is now mapped on Windows Explorer

Configuring IIS

If you are using the Map a Web Folder feature when the portal is running IIS, you must ensure the Front Page server extensions are disabled on the IIS Web site where the portal is deployed.

For Windows 2000 only:

1. Choose **Start |Programs|Administrative Tools|Internet Service Manager**.
2. Right-click on the Web site used by the portal.
3. Select **Properties**.
4. Select the **Server Extensions** tab.

If you receive a message stating that the server has not been configured to use server extensions, IIS is configured correctly.

If the **Enable authoring** check box exists, ensure that it is not selected.

Enabling Instant Messaging Presence

The Instant Messaging feature allows users to see which project collaborators are currently logged in to their Instant Messaging client. The user may then click the collaborator's IM icon to send an IM (may require the IM client application).

By default, the IM feature is disabled but can be enabled and configured in **config.xml**. To enable the IM feature, change the instant-messaging enabled value from **no** to **yes**. Also by default, the feature is configured to integrate with Yahoo! Instant Messaging. It may be possible to configure the feature to work with another Instant Messaging service, depending on the requirements of that service.

The values for these **config.xml** tags must be acquired from your Instant Messaging provider:

- **presence-url**: used to gather presence information
- **send-url**: used as the link value when a user clicks the IM icon to send a message to a collaborator
- **contact-url**: used to add a collaborator to the user's local IM client (not currently used in the Collaboration UI)

Granting Activity Rights

You must grant the correct activity rights to the groups you want to allow to use the Instant Message Presence feature:

1. Click the **Administration** tab.
2. Select the **Activity Manager** utility.
3. Click **Ability to View Instant Messaging Presence**.
4. Click **Add Group**.
5. Select the groups you want to add. The default setting lists only the **Administrators Group**.
6. Click **OK**.
7. Click **Finish**.

Configuring Advanced Collaboration Features

Silent Properties File

When you install Collaboration, the installer creates the file **AquaLogicInteractionCollaboration_<version>_silent.properties** in the directory where Collaboration is installed. Once you have created a silent properties file on one computer, you can reuse it when you install Collaboration on other computers, so that you do not have to re-enter deployment information every time you use the installer. During a “silent” install, the information required by the installation dialogs is read from the properties file.

A silent install may be run from the command line as follows:

```
ALICollaboration_<version> - f  
AquaLogicInteractionCollaboration_<version>_silent.properties
```

For example:

```
ALICollaboration_v4-1 - f  
AquaLogicInteractionCollaboration_v4-1_silent.properties
```

A silent install can be useful for distribution of the product across a uniform set of machines.

Silent Properties File

Configuring IIS

This appendix describes how to configure IIS to support the Exchange Remote API. You should ensure that the procedures covered in this appendix have been performed on the machine where the Exchange Remote API will be installed.

The following topics are covered:

- [Configuring IIS 6.0 on Windows 2003](#)
- [Configuring IIS 5.0 on Windows 2000](#)

Configuring IIS 6.0 on Windows 2003

This section describes pre- and post-installation steps to verify that IIS is configured to support the portal. It includes the following topics:

- [Configuring IIS Before You Run the AquaLogic Interaction Installer](#)
- [Configuring IIS After You Run the AquaLogic Interaction Installer](#)

Configuring IIS Before You Run the AquaLogic Interaction Installer

Before you install AquaLogic Interaction software, configure the following IIS elements:

1. Ensure that you have installed IIS and required .NET hotfixes. For information on compatible versions, see [“Hardware and Software Requirements” on page 2-4](#).

If IIS is not installed on your host computer, use the Manage Your Server utility to add Application Server as a role. This process installs and configures IIS, as well as enables ASP.NET.

2. Ensure the WWW Service is configured to start automatically. To configure Services:
 - a. Click **Start | Administrative Tools | Services**.
 - b. Right-click **World Wide Web Publishing Service** and then click **Properties**.
 - c. Configure the service to start automatically.
3. To ensure that .NET is registered in IIS, verify that the **.asmx**, **.aspx**, and **.asax** application extensions have been configured for IIS Web sites, To verify registered application extensions:
 - a. In IIS Manager, right-click the **Web Sites** folder and then click **Properties**.
 - b. Click the **Home Directory** tab.
 - c. Click the **Configuration** button.
 - d. Click the **Mappings** tab.
 - e. In the application extensions box, verify that the **.asmx**, **.aspx**, and **.asax** extensions have been installed and reference the .NET 1.1 **aspnet_isapi.dll** library.

If .NET has not been registered to IIS, register it with the ASP .NET registration utility., which is located in the .NET Framework installation. For example:

```
C:\WINDOWS\Microsoft.NET\Framework\v1.1.4322\aspnet_regiis.exe -i
```

4. On Windows 2003, portal components run in IIS 5.0 Isolation Mode. To configure IIS 6.0 for IIS 5.0 Isolation Mode:
 - a. In IIS Manager, expand the local computer, right-click **Web Sites** and then click **Properties**.
 - b. Click the **Service** tab, select the **Run WWW service in IIS 5.0 isolation mode** check box, and then click **OK**.
5. Configure request handling for Web extensions used by Collaboration. To configure permissions for Web extensions:
 - a. In IIS Manager, expand the local computer and click **Web Service Extensions**.

- b. Use the controls to set **ASP .NET** to enable request handling.
6. Verify that IIS Directory Security is configured with a *user name - password* pair to enable anonymous access:
 - a. In IIS Manager, expand the local computer, right-click **Web Sites**, and select **Properties**.
 - b. Click the **Directory Security** tab.
 - c. Ensure that **Enable Anonymous Access** is selected and that the *user name - password* pair is valid.
- Note:** After installation, you may change security settings according to your security plan. For information on security in the portal, see the *Deployment Guide for BEA AquaLogic User Interaction* (Plumtree Application Suite) and the *Administrator Guide for BEA AquaLogic Interaction Collaboration*.

Configuring IIS After You Run the AquaLogic Interaction Installer

After you install AquaLogic Interaction software, verify that the following elements have been configured:

1. Verify that the portal gateway filter (also known as the Plumtree Gateway filter) has been installed. To display the ISAPI filter stack:
 - a. In IIS Manager, expand the local computer, right-click **Web Sites** and then click **Properties**.
 - b. Click the **ISAPI Filters** tab and make sure that the **Plumtree Gateway** filter is installed and ordered above the **ASP.NET** filter in the stack. If necessary, re-order the stack.
 - c. Restart IIS.
2. Verify that the **.pt** extension mapping has been added to the portal Web site and is properly configured. To display extension mappings:
 - a. In IIS Manager, expand the **Web Sites** folders to display the portal virtual directory; right-click the portal virtual directory and then click **Properties**.
 - b. Click the **Home Directory** tab.
 - c. Click the **Configuration** button.
 - d. Click the **Mappings** tab.

- e. In the application extensions box, verify that the **.pt** extension has been installed; click **Edit** and verify that the **.pt** extension references the .NET 1.1 aspnet_isapi.dll and that the Verb list includes GET, HEAD, POST, OPTIONS, PROPFIND, PROPPATCH, MKCOL, LOCK, UNLOCK, PUT, DELETE, COPY, and MOVE.

Configuring IIS 5.0 on Windows 2000

This section describes pre- and post-installation steps to verify that IIS is configured to support the portal. It includes the following topics:

- [Configuring IIS Before You Run the AquaLogic Interaction Installer](#)
- [Configuring IIS After You Run the AquaLogic Interaction Installer](#)

Configuring IIS Before You Run the AquaLogic Interaction Installer

Before you install AquaLogic Interaction software, configure the following IIS elements:

1. Ensure that you have installed IIS and required .NET hotfixes. For information on compatible versions, see [“Hardware and Software Requirements” on page 2-4](#).
2. To ensure that .NET is registered in IIS, check that the **.asmx**, **.aspx**, and **.asax** application extensions have been configured for IIS Web sites. To check registered application extensions:
 - a. In IIS Manager, right-click the **Web Sites** folder and then click **Properties**.
 - b. Click the **Home Directory** tab.
 - c. Click the **Configuration** button.
 - d. Click the **Mappings** tab.
 - e. In the application extensions box, verify that the **.asmx**, **.aspx**, and **.asax** extensions have been installed and reference the .NET 1.1 library.

If .NET has not been registered to IIS, register it with the ASP .NET registration utility, which is located in the .NET Framework installation. For example:

```
C:\WINNT\Microsoft.NET\Framework\v1.1.4322\aspnet_regiis.exe -i
```

Configuring IIS After You Run the AquaLogic Interaction Installer

After you install AquaLogic Interaction software, verify that the following elements have been configured:

1. Verify that the portal gateway filter (also known as the Plumtree Gateway filter) has been installed. To display the ISAPI filter stack:
 - a. In IIS Manager, expand the local computer, right-click **Web Sites** and then click **Properties**.
 - b. Click the **ISAPI Filters** tab and make sure that the **Plumtree Gateway** filter is installed and ordered above the **ASP.NET** filter in the stack. If necessary, re-order the stack.
 - c. Restart IIS.
2. Verify that the **.pt** extension mapping has been configured for the portal virtual directory. To display extension mappings:
 - a. In IIS Manager, expand the **Web Sites** folders to display the portal virtual directory; right-click the portal virtual directory and then click **Properties**.
 - b. Click the **Home Directory** tab.
 - c. Click the **Configuration** button.
 - d. Click the **Mappings** tab.
 - e. In the application extensions box, verify that the **.pt** extension has been installed; click **Edit** and verify that the **.pt** extension references the .NET 1.1 **aspnet_isapi.dll** library and that the Verb list includes GET, HEAD, POST, OPTIONS, PROPFIND, PROPPATCH, MKCOL, LOCK, UNLOCK, PUT, DELETE, COPY, and MOVE.

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