



BEA AquaLogic® Interaction Collaboration

Installation and Upgrade Guide

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Welcome

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

How To Use This Book

This guide has been designed to be used by Collaboration administrators and developers. It has been organized to be a quick reference for experienced Collaboration installers, while also providing detailed instructions for those installing for the first time.

Audience

It is expected that the user of this guide has strong knowledge of the platform operating system, database, web and application servers, and any other third-party software required for the Collaboration installation.

Organization

- This chapter provides information on how to use this guide, and other resources available to help install, deploy, upgrade, and administer the Collaboration components.
- [Chapter 2, “Installation Prerequisites,”](#) provides hardware and software requirements, as well as environmental and third-party software prerequisites. This chapter must be read and prerequisites must be met prior to proceeding to the installation or upgrade.

- [Chapter 3, “QuickStart Overview,”](#) provides a high level overview of the Collaboration installation and upgrade procedures. Sufficient detail is provided to allow an experienced Collaboration administrator to quickly install or upgrade Collaboration. Cross-references link the high level tasks to detailed procedures in other chapters.
- [Chapter 4, “Installation,”](#) provides detailed instructions for the installation and configuration of Collaboration.
- [Chapter 5, “Upgrade,”](#) provides detailed instructions for upgrading to Collaboration 4.5 MP1.
- [Appendix A, “Installing the Exchange Remote API to Enable Groupware Integration,”](#) provides detailed instructions for the installation and configuration of the Exchange Remote API, which is used to integrate with Microsoft Exchange.
- [Appendix B, “Silent Properties File,”](#) provides information on how to use the silent properties file during installation.
- [Appendix C, “Uninstalling Collaboration,”](#) provides instructions for uninstalling Collaboration.

Typographical Conventions

This book uses the following typographical conventions.

Table 1-1 Typographical Conventions

Convention	Typeface	Examples/Notes
<ul style="list-style-type: none">• Items you need to take action on (such as files or screen elements)	bold	<ul style="list-style-type: none">• Upload Procedures.doc to the portal.• To save your changes, click Apply Changes.
<ul style="list-style-type: none">• User-defined variables• New terms• Emphasis• Object example names	<i>italic</i>	<ul style="list-style-type: none">• The migration package file is located in <i>install_dir\serverpackages</i>.• <i>Portlets</i> are Web tools embedded in your portal.• The URI <i>must</i> be a unique number.• The example Knowledge Directory displayed in Figure 5 shows the <i>Human Resources</i> folder.

Table 1-1 Typographical Conventions

Convention	Typeface	Examples/Notes
<ul style="list-style-type: none"> Text you enter Computer generated text (such as error messages) Code samples 	computer	<ul style="list-style-type: none"> Type Marketing as the name of your community. This script may generate the following error: ORA-00942 table or view does not exist Example: <pre><setting name="SSOCookieIsSecure"> <value xsi:type="xsd:integer">0</value> </setting></pre>
<ul style="list-style-type: none"> Environment variables 	ALL_CAPS	<ul style="list-style-type: none"> The default location of BEA_HOME is C:\bea.

BEA Documentation and Resources

This section describes other documentation and resources provided by BEA.

Table 1-2 BEA Documentation and Resources

Resource	Description
Installation Worksheet	<p>This worksheet allows you to record prerequisite information necessary for installing Collaboration.</p> <p>It is available on edocs.bea.com/alui/collaboration/docs45.</p>
Release Notes	<p>The release notes provide information about new features, issues addressed, and known issues in the release.</p> <p>They are available on edocs.bea.com/alui/collaboration/docs45 and on any physical media provided for delivering the application.</p>
Administrator Guide	<p>This guide describes how to manage, maintain, and troubleshoot Collaboration.</p> <p>It is available on edocs.bea.com/alui/collaboration/docs45.</p>
Online Help	<p>The online help is written for all levels of Collaboration users. It describes the user interface for Collaboration and gives detailed instructions for completing tasks in Collaboration.</p> <p>To access online help, click the help icon.</p>

Table 1-2 BEA Documentation and Resources

Resource	Description
Deployment Guide	This guide is written for business analysts and system administrators. It describes how to plan your AquaLogic User Interaction deployment. It is available on edocs.bea.com/alui/deployment/index.html .
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.

Table 1-2 BEA Documentation and Resources

Resource	Description
AquaLogic User Interaction (ALUI) and AquaLogic Business Process Management (ALBPM) Support Center	<p data-bbox="413 392 1233 562">The ALUI and ALBPM Support Center is a comprehensive repository for technical information on ALUI and ALBPM 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 ALUI and ALBPM-related needs. The Support Center encompasses the following communities:</p> <p data-bbox="413 578 606 604">Technical Support</p> <p data-bbox="413 619 1233 673">Submit online service requests, check the status of your requests, search the knowledge base, access documentation, and download maintenance packs and hotfixes.</p> <p data-bbox="413 689 536 715">User Group</p> <p data-bbox="413 730 1201 784">Participate in user groups; view webinars, presentations, the CustomerConnection newsletter, and the Upcoming Events calendar.</p> <p data-bbox="413 800 575 826">Product Center</p> <p data-bbox="413 841 1220 923">Download product updates, maintenance packs, and patches; view the Product Interoperability matrix (supported third-party products and interoperability between products).</p> <p data-bbox="413 939 595 965">Developer Center</p> <p data-bbox="413 980 1147 1034">Download developer tools, view code samples, access technical articles, and participate in discussions.</p> <p data-bbox="413 1050 610 1076">Education Services</p> <p data-bbox="413 1091 1193 1173">Review the available education options, then choose courses by role and delivery method (Live Studio, Public Classroom Training, Remote Classroom, Private Training, or Self-Paced eLearning).</p> <p data-bbox="413 1189 561 1215">Profile Center</p> <p data-bbox="413 1230 1206 1256">Manage your implementation details, local user accounts, subscriptions, and more.</p> <p data-bbox="413 1272 1233 1354">If you do not see the Support Center when you log in to one.bea.com/support, contact ALUISupport@bea.com or ALBPMSupport@bea.com for the appropriate access privileges.</p>

Table 1-2 BEA Documentation and Resources

Resource	Description
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 or ALBPMSupport@bea.com</p> <p>Phone Numbers:</p> <p>USA, Canada +1 866.262.7586 or +1 415.263.1696</p> <p>EMEA +44 1494 559127</p> <p>Asia Pacific +61 2.9931.7822</p> <p>Australia/NZ +61 2.9923.4030</p> <p>Singapore +1 800.1811.202</p>

Installation Prerequisites

Complete the following basic steps to prepare your network and host computers for deployment:

1. Download the most up-to-date documentation from edocs.bea.com. Read the release notes for additional information on compatibility issues, known problems, and workarounds that might affect how you proceed with your deployment. Release notes are located at the top-level directory of the product package and on edocs.
2. Organize the information you need for the installation process by completing the *Installation Worksheets for BEA AquaLogic Collaboration 4.5*.
3. Provision host computers for your deployment and install prerequisite software. For details, see “[Hardware and Software Requirements](#)” on page 2-2.

Hardware and Software Requirements

The following table lists the software requirements for Collaboration. For more information on recommended configurations based on the size of your implementation, see the *Deployment Guide for BEA AquaLogic User Interaction*.

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

Table 2-1 Hardware and Software Requirements

Component	Requirement
Collaboration Host Computer	<ul style="list-style-type: none"> AIX 5.3, on POWER3, POWER4, POWER5 HP-UX 11i V2 & V3 (Itanium) (64-bit) Microsoft Windows 2003 SP1 or R2, SP2, on x86 (32-bit only) Red Hat Enterprise Linux 4.0 Update 5 (ES & AS), on x86 Solaris 9, 10, on SPARC SUSE Enterprise Linux 10, on x86
Database Server Host Computer	<ul style="list-style-type: none"> (Windows only) Microsoft SQL Server 2005 (32 and 64-bit, with SQL Server 2000 compatibility level) IBM DB/2, version 9.5 Oracle Oracle 9i (v.9.2.0.7); 10G (v.10.1.0.3), 10G R2 (v.10.2.0.x), Oracle 10g R2 (10.2.0.x). Oracle 10.x versions can be in default or Oracle RAC configuration <p>Note: If you are upgrading Oracle from 10.1.x to 10.2.x or SQL Server from 2000 to 2005, you should perform this upgrade before upgrading Collaboration.</p>
Servlet Engine	<ul style="list-style-type: none"> BEA Embedded Servlet Engine 4.0 BEA WebLogic Server 10 MP1 with BEA JRockit 5.0 (R26.4.0 + CR302700) JDK (32-bit) and all later 5.0 releases of JRockit
Portal	<ul style="list-style-type: none"> BEA AquaLogic Interaction 6.5, 6.5 MP1
Browser	<ul style="list-style-type: none"> Firefox 2.0, 3.0 Microsoft Internet Explorer 6.x, 7.0 Netscape 7.2, 8.x Safari 2.0, 3.0 (Simple Mode only)

Table 2-1 Hardware and Software Requirements

Component	Requirement
Groupware Servers	<ul style="list-style-type: none">• Lotus Notes 5.0.11• Microsoft Exchange 2000 (SP3 and higher)• Microsoft Exchange 2003
Microsoft Project	<ul style="list-style-type: none">• Microsoft Project 2003, 2007
Microsoft Office (for Collaboration Office Tools Add-In and WebDAV functionality)	<ul style="list-style-type: none">• Microsoft Office 2003, 2007 on Microsoft Windows XP SP2+• Microsoft Office 2003 on Microsoft Vista
Required Software for Microsoft Exchange Integration	<ul style="list-style-type: none">• Microsoft.NET 2.0• Microsoft Web Services Enhancement 2.0

Installation Prerequisites

QuickStart Overview

This chapter provides brief, high level instructions for the installation and upgrade of Collaboration, and is intended to quickly guide experienced administrators through the installation or upgrade procedure.

This chapter is divided into two major sections:

- [Installation](#). This section covers installing the Collaboration components, scripting the database, and starting and verifying the installation. The organization of this section maps directly to detailed instructions in [Chapter 4, “Installation.”](#)
- [Upgrade](#). This section covers upgrading Collaboration to the latest version. The organization of this section maps directly to detailed instructions in [Chapter 5, “Upgrade.”](#)

Installation

This section describes how to install Collaboration.

Creating the Collaboration Database

Refer to the section that applies to your database vendor.

- [“Creating and Configuring the Collaboration Database on Microsoft SQL Server”](#) on page 3-2.
- [“Configuring an Oracle Database for Collaboration”](#) on page 3-2.

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

For more information on these steps, see [“Creating the Collaboration Database” on page 4-2](#).

Creating and Configuring the Collaboration Database on Microsoft SQL Server

To create the Collaboration database and database user:

1. Configure the SQL Server instance to use **SQL Server and Windows Authentication mode**.
2. Create the Collaboration database with the Collaboration database name you designated when you completed the worksheets provided in the *Installation and Configuration Worksheets for BEA AquaLogic Collaboration 4.5*.
3. Create the Collaboration database user login with the login name and password you designated when you completed the worksheet provided in the *Installation and Configuration Worksheets for BEA AquaLogic Collaboration 4.5*.
 - a. Configure the Collaboration database user login to use **SQL Server Authentication**.
 - b. Set the Collaboration database user login's default database to the Collaboration database.
 - c. Grant the Collaboration database user login the **db_owner** role for the Collaboration database.
4. Create a schema for the Collaboration database with the schema name you designated when you completed the worksheets provided in the *Installation and Configuration Worksheets for BEA AquaLogic Collaboration 4.5*. This name must be the same as the Collaboration database user name.
5. In the Collaboration database user's login properties, navigate to the User Mapping page.
6. Set the default schema of the Collaboration database user login to the new schema of the same name.

Configuring an Oracle Database for Collaboration

The Collaboration schema is added to the existing Oracle database that contains the portal schema. 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.

Installing the Collaboration Components

To install Collaboration, launch the Collaboration installer as a local administrator:

- On a **UNIX/Linux** host the installer is **ALICollaboration_v4-5_mp1**.
- On a **Windows** host the installer is **ALICollaboration_v4-5.exe_mp1**.

The installer prompts you for specific information about your system and configuration. For more information, see [“Installing the Collaboration Components” on page 4-3](#).

Note: The Notification Service that was previously included in the Collaboration installer has been replaced by the AquaLogic Notification Service. Collaboration uses the AquaLogic Notification Service to send emails from Collaboration to end users and to serve RSS feeds if that feature has been enabled. The AquaLogic Notification Service is included with the AquaLogic Interaction installer and is a required component of AquaLogic Interaction. The AquaLogic Notification Service should be installed and configured as part of your AquaLogic Interaction installation.

Deploying Collaboration on WebLogic Server

The Collaboration installer automatically deploys Collaboration on the Embedded Servlet Engine. You can choose to deploy Collaboration on WebLogic Server instead of the Embedded Servlet Engine.

Important: If you choose to deploy Collaboration on WebLogic Server, you should disable the **BEA ALI Collaboration Service** that is installed by the installer on Windows machines. You will not be able to start and stop Collaboration using Configuration Manager.

To deploy Collaboration on WebLogic Server:

1. Identify a domain on which to deploy Collaboration, or create a new domain. Refer to your WebLogic Server documentation for details on creating a new domain.
2. In the portal’s **config.xml** file for the domain on which the portal is deployed, add the following line at the end of the `<security-configuration>` tag:

```
<enforce-valid-basic-auth-credentials>false</enforce-valid-basic-auth-credentials>
```

This disables basic authentication for the domain, and is necessary for WebDAV to work properly.

Note: The `<enforce-valid-basic-auth-credentials>` line must be the last entry in the `<security-configuration>` tag for the setting to take effect.

3. Add the following text to the `setDomainEnv.sh` or `setDomainEnv.cmd` file of the domain:

- **On UNIX/Linux, add the following to `setDomainEnv.sh`. You must add this as one line of code:**

```
JAVA_OPTIONS="${SAVE_JAVA_OPTIONS}"  
-Dbid.application.config=PT_HOME/settings  
-Dplumtree.application.config=PT_HOME/settings  
-Dbid.application=PT_HOME/ptcollab/4.5  
-Dplumtree.application=PT_HOME
```

- **On Windows, add the following to `setDomainEnv.cmd`. You must add this as one line of code:**

```
set JAVA_OPTIONS=%SAVE_JAVA_OPTIONS%  
-Dbid.application.config=PT_HOME\settings  
-Dplumtree.application.config=PT_HOME\settings  
-Dbid.application=PT_HOME\ptcollab\4.5  
-Dplumtree.application=PT_HOME
```

Enter the actual value of `PT_HOME` in the file. `PT_HOME` is the same value as *install_dir*. By default, the value for *install_dir* is `/opt/BEA/alui` on UNIX/Linux and `C:\BEA\alui` on Windows.

4. Start the WebLogic domain.
5. Deploy **collab.ear**, located in the following location, as an application in the WebLogic domain:

UNIX/Linux: *install_dir*/ptcollab/4.5/webapp/

Windows: *install_dir*\ptcollab\4.5\webapp\

Refer to your WebLogic Server documentation for details on how to deploy an application.

6. Update the Collaboration application settings in Configuration Manager to reflect the correct port numbers for the Collaboration UI:
 - a. Launch Configuration Manager.
 - b. In the application list on the left, under Collaboration, click **Application Settings**.

- c. Update the values of **HTTP port** and **HTTPS port** with the port numbers used by the Collaboration domain in WebLogic.
 - d. Click **SAVE**.
7. Update the URL of the Collaboration remote server:
- a. Log in to the portal.
 - b. Navigate to the Collaboration remote server object in the **Admin Object Directory** and open it for editing.
 - c. On the Main Settings page, set the port number of the **Base URL** to the port number of the Collaboration application in WebLogic.
 - d. Click **Finish**.
8. In Collaboration's **config.xml** file for the domain on which Collaboration is deployed, add the following line at the end of the `<security-configuration>` tag:
- ```
<enforce-valid-basic-auth-credentials>false</enforce-valid-basic-auth-credentials>
```
- This disables basic authentication for the domain, and is necessary for WebDAV and Collaboration RSS Feeds to work properly.
- Note:** The `<enforce-valid-basic-auth-credentials>` line must be the last entry in the `<security-configuration>` tag for the setting to take effect.

## Scripting the Collaboration and Portal Databases

Refer to the section that is appropriate to your database vendor.

### Scripting the Databases on Microsoft SQL Server

This section describes how to create and configure the Collaboration database schema, as well as configure the portal database schema for Collaboration.

To script the databases on Microsoft SQL Server:

1. Run the following database scripts as the Collaboration database user on the Collaboration database:
  - *install\_dir*\ptcollab\4.5\sql\mssql\collaboration-server-create-tables.sql
  - *install\_dir*\ptcollab\4.5\sql\mssql\collaboration-server-data.sql

- ***install\_dir\ptcollab\4.5\sql\mssql\collaboration-server-portal-role-grant.sql***

2. Run the following database scripts as the `sa` user on the portal database:

- ***install\_dir\ptcollab\4.5\sql\mssql\portal-collaboration-server-data.sql***
- ***install\_dir\ptcollab\4.5\sql\mssql\portal-collaboration-server-role-grant.sql***

For more information on these steps, see [“Scripting the Databases on Microsoft SQL Server” on page 4-10](#).

## Scripting the Database on Oracle

This section describes how to create and configure the Collaboration database schema, as well as configure the portal database schema for Collaboration.

To script the database on Oracle:

1. Locate the versions of the database scripts appropriate to your database platform:

- ***install\_dir\ptcollab\4.5\sql\oracle\unix\***
- ***install\_dir\ptcollab\4.5\sql\oracle\windows\***

2. Run the following database scripts as the system user on the portal database:

- ***collaboration-server-create-table-space.sql***
- ***collaboration-server-create-user.sql***

3. Run the following database scripts as the Collaboration database user on the portal database:

- ***collaboration-server-create-tables.sql***
- ***collaboration-server-data.sql***
- ***collaboration-server-portal-role-grant.sql***

4. Run the following database scripts as the portal database user on the portal database:

- ***portal-collaboration-server-data.sql***
- ***portal-collaboration-server-role-grant.sql***

For more information on these steps, see [“Scripting the Database on Oracle” on page 4-11](#).

## Scripting a DB2 Database on UNIX for Collaboration

This topic describes how to script a DB2 database for use with Collaboration.

**Note:** For this release, BEA does not support scripting a DB2 database on Windows for Collaboration.

Before scripting a DB2 database for Collaboration:

- Ensure that the data for the AquaLogic Interaction and ALUI Directory applications is stored in distinct schemas on the same DB2 database.
- Create a distinct schema for the Collaboration database on the same DB2 database that contains the schemas for the AquaLogic Interaction and ALUI Directory applications.
- Have your DB2 database administrator examine and, if necessary, customize the SQL scripts before you use them. Each SQL file contains comments that describe the customizations that might be necessary.

**Note:** The Collaboration SQL scripts for DB2 include hard-coded schema names for the Collaboration and portal databases. In the **collaboration-server-create-tables.sql**, **collaboration-server-data.sql**, and **collaboration-server-portal-role-grant.sql** scripts, the hard-coded name for the Collaboration schema is *COLLAB*. If you updated the Collaboration schema name to anything other than *COLLAB*, you must navigate to Configuration Manager, Collaboration application, Collaboration Database component, and update the **Schema Name** setting to match the updated Collaboration schema name.

In the **portal-collaboration-server-role-grant.sql** and **portal-collaboration-server-data.sql** scripts, the hard-coded name for the portal schema is *ALUI*. If you updated the portal schema name to anything other than *ALUI*, you must update these scripts to match the updated portal schema name. Additionally, you must navigate to Configuration Manager, Collaboration application, Collaboration Settings component, and update the **Linked database alias** setting to match the updated portal schema name. Make sure to add *.dbo.* to the end of the portal schema name. For example, if the portal schema name is *alidbuser*, the value that you type into the Linked database alias setting should be *alidbuser.dbo*.

Use the DB2 command line processor to run the SQL scripts against your DB2 database. Comments in the header of each SQL file contain recommended syntax for the DB2 command line processor.

To script a DB2 database for Collaboration:

1. Copy SQL scripts from the Collaboration installation directory to your DB2 database server.  
The scripts are located in: *install\_dir/ptcollab/4.5/sql/db2*
2. As a user with administrative privileges, run the these scripts in the following order:
  - a. **create\_collab\_schema.sql**

- b. **create\_collab\_tablespace\_unix.sql**
- c. **grant\_collab\_user.sql**
- d. **collaboration-server-create-tables.sql**
- e. **collaboration-server-data.sql**
- f. **collaboration-server-portal-role-grant.sql**
- g. **portal-collaboration-server-role-grant.sql**
- h. **portal-collaboration-server-data.sql**

For more information on these steps, see [“Scripting a DB2 Database on UNIX for Collaboration” on page 4-13.](#)

## Configuring the Image Service for Notification Emails

If your Image Service is deployed on IIS, you must register two new MIME types in IIS so that email notifications will work properly.

To configure IIS for notification emails:

1. In IIS, register the extensions “.nst” and “.inc” with a MIME type of “text/plain”.
2. Restart the World Wide Web Publishing Service so that the changes take effect.

For more information on these steps, see [“Starting and Verifying the Installation” on page 4-16.](#)

## Importing the Collaboration Migration Package

Import the **collaboration.pte** file, which is located in the following location on the Collaboration host machine:

- **UNIX/Linux:** *install\_dir/ptcollab/4.5/serverpackages/*
- **Windows:** *install\_dir\ptcollab\4.5\serverpackages\*

For details, see [“Importing the Collaboration Migration Package” on page 4-15.](#)

## Starting and Verifying the Installation

This section describes how to start Collaboration and verify operation.

1. Verify that the following AquaLogic Interaction services are started:



- Search Server
  - API Service
  - Automation Service
  - Document Repository Service
  - LDAP Directory Service
  - Notification Service
2. Start the Search Service used by Collaboration.
  3. Start Collaboration. If Collaboration is deployed on WebLogic Server, start the domain on which Collaboration is deployed.
  4. To verify that Collaboration is functioning correctly, access and analyze the Collaboration Diagnostics page:

`http://<mycollabserver>:<mycollabport>/collab/admin/diagnostic`

For more information on these steps, see [“Starting and Verifying the Installation” on page 4-16](#).

## Upgrade

This section provides brief, high level instructions for the process of upgrading previous versions of Collaboration to the latest version.

### Upgrade Paths

This section provides the paths that are available to upgrade to Collaboration 4.5 MP1.

**Note:** All upgrade paths are between two systems of the same operating system brand, but not necessarily the same operating system version. Check current hardware and software requirements and make any required upgrades to operating system or database software prior to proceeding with the portal upgrade.

| Upgrade Path                                                 | Upgrade References                                                                                                                 |
|--------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------|
| Collaboration 4.2, 4.2 MP1 to Collaboration 4.5 MP1          | Follow the procedure described in <a href="#">“Upgrading from Collaboration 4.x to Collaboration 4.5 MP1” on page 3-10.</a>        |
| Collaboration 4.1, 4.1 SP1, 4.1 SP2 to Collaboration 4.5 MP1 |                                                                                                                                    |
| Collaboration 4.0.2 to Collaboration 4.5 MP1                 |                                                                                                                                    |
| Collaboration Server 3.x to Collaboration 4.5 MP1            | Follow the procedure described in <a href="#">“Upgrading from Collaboration Server 3.x to Collaboration 4.5 MP1” on page 3-11.</a> |
| Collaboration Server 2.x to Collaboration 4.5 MP1            | Follow the procedure described in <a href="#">“Upgrading from Collaboration Server 2.x to Collaboration 4.5 MP1” on page 3-11.</a> |

## Upgrading from Collaboration 4.x to Collaboration 4.5 MP1

This section describes how to upgrade from Collaboration 4.x to Collaboration 4.5 MP1.

To upgrade from Collaboration 4.x to Collaboration 4.5 MP1:

1. Stop Collaboration.
2. If you have an existing Notification Service from your previous installation of Collaboration, disable or uninstall it. The Notification Service that was previously included in the Collaboration installer has been replaced by the AquaLogic Notification Service and is included in the AquaLogic Interaction installer. The AquaLogic Notification Service is a required component of AquaLogic Interaction and should be installed and configured as part of your AquaLogic Interaction installation.
3. Stop the Search Server, Automation Service, and Document Repository Service.
4. Back up the portal database, Collaboration database, and Document Repository.
5. Clear the Embedded Servlet Engine’s work directory.
6. Install the Collaboration components. For details on launching the installer and completing its screens, see [“Launching the Collaboration Installer” on page 4-4.](#)

7. **(Optional)** Deploy Collaboration on WebLogic Server. By default, Collaboration is deployed on the Embedded Servlet Engine. You only need to perform this step if you want to deploy Collaboration on WebLogic Server instead of the Embedded Servlet Engine. For details, see [“Deploying Collaboration on WebLogic Server” on page 3-3](#).
8. Upgrade the portal and Collaboration databases. For details, see [“Upgrading the Portal and Collaboration Databases” on page 3-12](#).
9. Import the Collaboration migration package. For details, see [“Importing the Collaboration Migration Package” on page 3-8](#).
10. **(Image Service on IIS only)** Configure the Image Service to work with the AquaLogic Notification Service. For details, see [“Configuring the Image Service for Notification Emails” on page 3-8](#).
11. Start Collaboration and verify operation. For details, see [“Starting and Verifying the Installation” on page 3-8](#).
12. Rebuild the Collaboration search collection. For details, see [“Rebuilding the Collaboration Search Collection” on page 5-6](#).

For more information on these steps, see [“Upgrading from Collaboration 4.x to Collaboration 4.5 MP1” on page 5-2](#).

## Upgrading from Collaboration Server 3.x to Collaboration 4.5 MP1

This section describes how to upgrade from Collaboration Server 3.x to Collaboration 4.5 MP1.

If you are currently running Collaboration Server 3.x, you must first upgrade to Collaboration Server 4.0.2. Refer to the *Installation Guide for Plumtree Collaboration Server 4.0.2* for information on this upgrade path.

After upgrading to Collaboration Server 4.0.2, upgrade to Collaboration 4.5 MP1 according to the instructions described in [“Upgrading from Collaboration 4.x to Collaboration 4.5 MP1” on page 3-10](#).

## Upgrading from Collaboration Server 2.x to Collaboration 4.5 MP1

This section describes how to upgrade from Collaboration Server 2.x to Collaboration 4.5 MP1.

If you are currently running Collaboration Server version 2.x, you must first upgrade to Collaboration Server 3.0.2. Refer to the *Installation Guide for Plumtree Collaboration Server 3.0* for information on this upgrade path.

After upgrading to Collaboration Server 3.0.2, you must upgrade to Collaboration Server 4.0.2. Refer to the *Installation Guide for Plumtree Collaboration Server 4.0.2* for information on this upgrade path.

After upgrading to Collaboration Server 4.0.2, upgrade to Collaboration 4.5 MP1 according to the instructions described in [“Upgrading from Collaboration 4.x to Collaboration 4.5 MP1” on page 3-10](#).

**Note:** **UNIX/Linux users** - Collaboration 3.x was released only on Windows. The installation of 3.0.2 must take place on a Windows machine.

## Upgrading the Portal and Collaboration Databases

This section describes how to upgrade the portal and Collaboration databases.

**Note:** If you are upgrading Oracle from 10.1.x to 10.2.x or SQL Server from 2000 to 2005, you should perform the Oracle or SQL Server upgrade before upgrading the databases.

Run the upgrade scripts appropriate to your database platform. The upgrade scripts are located in:

### Microsoft SQL Server:

- `install_dir\ptcollab\4.5\sql\mssql`

### Oracle:

- `install_dir\ptcollab\sql\oracle\unix`
- `install_dir\ptcollab\4.5\sql\oracle \windows`

Follow the database upgrade instructions appropriate to your previous version of Collaboration, as described in the following table:

| Upgrade Path                         | Database Upgrade Instructions                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|--------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 4.2 MP1 to 4.5 MP1<br>4.2 to 4.5 MP1 | <p>As the Collaboration database user, run the following script on the Collaboration database:</p> <ul style="list-style-type: none"> <li>• <b>collaboration-server-4.2.0-to-4.5.0-upgrade.sql</b></li> </ul> <p>As the portal database user, run the following script on the portal database:</p> <ul style="list-style-type: none"> <li>• <b>portal-collaboration-server-upgrade.sql</b></li> </ul>                                                                                                                                                                                                                            |
| 4.1 SP2 to 4.5 MP1                   | <p>As the Collaboration database user, run the following scripts in sequential order on the Collaboration database:</p> <ul style="list-style-type: none"> <li>• <b>collaboration-server-4.1.2-to-4.2.0-upgrade.sql</b></li> <li>• <b>collaboration-server-4.2.0-to-4.5.0-upgrade.sql</b></li> </ul> <p>As the portal database user, run the following script on the portal database:</p> <ul style="list-style-type: none"> <li>• <b>portal-collaboration-server-upgrade.sql</b></li> </ul>                                                                                                                                     |
| 4.1 SP1 to 4.5 MP1<br>4.1 to 4.5 MP1 | <p>As the Collaboration database user, run the following scripts in sequential order on the Collaboration database:</p> <ul style="list-style-type: none"> <li>• <b>collaboration-server-4.1.1-to-4.1.2-upgrade.sql</b></li> <li>• <b>collaboration-server-4.1.2-to-4.2.0-upgrade.sql</b></li> <li>• <b>collaboration-server-4.2.0-to-4.5.0-upgrade.sql</b></li> </ul> <p>As the portal database user, run the following script on the portal database:</p> <ul style="list-style-type: none"> <li>• <b>portal-collaboration-server-upgrade.sql</b></li> </ul>                                                                   |
| 4.0.2 to 4.5 MP1                     | <p>As the Collaboration database user, run the following scripts in sequential order on the Collaboration database:</p> <ul style="list-style-type: none"> <li>• <b>collaboration-server-4.0.2-to-4.1.1-upgrade.sql</b></li> <li>• <b>collaboration-server-4.1.1-to-4.1.2-upgrade.sql</b></li> <li>• <b>collaboration-server-4.1.2-to-4.2.0-upgrade.sql</b></li> <li>• <b>collaboration-server-4.2.0-to-4.5.0-upgrade.sql</b></li> </ul> <p>As the portal database user, run the following script on the portal database:</p> <ul style="list-style-type: none"> <li>• <b>portal-collaboration-server-upgrade.sql</b></li> </ul> |

For more information on upgrading the portal and Collaboration databases, see [“Upgrading the Portal and Collaboration Databases” on page 5-5](#).

## QuickStart Overview

# Installation

This chapter describes how to install Collaboration. If you are upgrading from an earlier version, refer first to [Chapter 5, “Upgrade.”](#)

To install Collaboration:

1. Ensure that you have met the prerequisites for installation. For details, see [“Installation Prerequisites” on page 2-1.](#)
2. Create the Collaboration database. For details, see [“Creating the Collaboration Database” on page 4-2.](#)
3. Install the Collaboration components. For details, see [“Installing the Collaboration Components” on page 4-3.](#)
4. **(Optional)** Deploy Collaboration on WebLogic Server. By default, Collaboration is deployed on the Embedded Servlet Engine. You only need to perform this step if you want to deploy Collaboration on WebLogic Server instead of the Embedded Servlet Engine. For details, see [“Deploying Collaboration on WebLogic Server” on page 4-7.](#)
5. Script the portal and Collaboration databases. For details, see [“Scripting the Collaboration and Portal Databases” on page 4-9.](#)
6. Import the Collaboration migration package. For details, see [“Importing the Collaboration Migration Package” on page 4-15.](#)
7. **(Image Service on IIS only)** Configure the Image Service to work properly with the AquaLogic Notification Service. For details, see [“Starting and Verifying the Installation” on page 4-16.](#)

8. Start Collaboration and verify operation. For details, see [“Starting and Verifying the Installation” on page 4-16.](#)

## Creating the Collaboration Database

This section describes how to create and configure the database used by Collaboration. It is expected that the person setting up the Collaboration database has a strong understanding of database system administration.

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

To set up the Collaboration database, follow the steps in the subsection appropriate to your environment:

- To set up the Collaboration database on Microsoft SQL Server, see [“Creating and Configuring the Collaboration Database on Microsoft SQL Server” on page 4-2.](#)
- To set up the Collaboration database on Oracle, see [“Configuring an Oracle Database for Collaboration” on page 4-3.](#)
- To set up the Collaboration database on DB2, see [“Scripting a DB2 Database on UNIX for Collaboration” on page 4-13.](#)

## Creating and Configuring the Collaboration Database on Microsoft SQL Server

This section describes how to create and configure the Collaboration database on Microsoft SQL Server.

To set up the Collaboration database on Microsoft SQL Server:

1. Configure the SQL Server instance to use **SQL Server and Windows Authentication mode**.
2. Create the Collaboration database:
  - a. Set the Collaboration database name to the name you specified for the Collaboration database when you completed the worksheets provided in the *Installation and Configuration Worksheets for BEA AquaLogic Collaboration 4.5*.
  - b. Verify that the initial size of the Collaboration database is sufficient for your Collaboration deployment. For a relatively small installation, configure a database that is



at least 100 MB. For a large enterprise with as many as 20,000 users, configure a database that is as large as 1 GB.

3. Create the Collaboration database user login:
  - a. Create the Collaboration database user login with the login name you designated when you completed the worksheet provided in the *Installation and Configuration Worksheets for BEA AquaLogic Collaboration 4.5*.
  - b. Configure the Collaboration database user login to use **SQL Server Authentication**.
  - c. Set the Collaboration database user login password to the password you designated when you completed the worksheet provided in the *Installation and Configuration Worksheets for BEA AquaLogic Collaboration 4.5*.
  - d. Set the Collaboration database user login's default database to the Collaboration database.
  - e. Grant the Collaboration database user login the **db\_owner** role for the Collaboration database.
4. Create a schema for the Collaboration database with the schema name you designated when you completed the worksheets provided in the *Installation and Configuration Worksheets for BEA AquaLogic Collaboration 4.5*. This name must be the same as the Collaboration database user name.
5. In the Collaboration database user's login properties, navigate to the User Mapping page.
6. Set the default schema of the Collaboration database user login to the new schema of the same name.

## Configuring an Oracle Database for Collaboration

Collaboration does not use its own Oracle database. Instead, the Collaboration schema is added to the existing Oracle database that contains the portal schema.

Before installing Collaboration verify that you have a correctly installed and configured the Oracle portal database. 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.

## Installing the Collaboration Components

This section describes how to install the Collaboration components.

The Collaboration components are:

1. **Collaboration Web UI:** This is the core Collaboration application. It is required.
2. **Image Service Files:** This required component installs the necessary images, styles, user interface controls, Java applets, and online help for Collaboration. Install these files on the same machine on which the portal's Image Service is installed.
3. **Search Service:** This required component enables Collaboration items to be indexed and searched for in the portal. One instance of the Search Service should be installed per instance of Collaboration, however a single instance can be reused in low traffic deployments. For more information on improving Search Service performance, see the *Deployment Guide for BEA AquaLogic User Interaction*.

**Note: (Windows Only)** When installing the Search Service component, the Collaboration installer checks if a necessary Visual Studio 2005 patch is installed on your server. If the patch is not installed, you must choose to either allow the Collaboration installer to install the patch immediately, or manually install the patch at the time of your choosing.

When performing a clean install, you can install the Collaboration components in any order; however, you should not start any of the components until all components are installed.

**Note:** The Notification Service that was previously included in the Collaboration installer has been replaced by the AquaLogic Notification Service. Collaboration uses the AquaLogic Notification Service to send emails from Collaboration to end users and to serve RSS feeds if that feature is enabled. The AquaLogic Notification Service is included with the AquaLogic Interaction installer and is a required component of AquaLogic Interaction. The AquaLogic Notification Service should be installed and configured as part of your AquaLogic Interaction installation.

## Launching the Collaboration Installer

This section describes how to launch the Collaboration installer.

To install Collaboration, you must have administrator rights on the machine where you are running the installer.

**Note:** 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 [Appendix B, "Silent Properties File,"](#) for information on how to run a silent install.

To install Collaboration:

1. Launch the Collaboration installer by performing the following:

- **UNIX/Linux:**
    - Log in to the Collaboration host machine as the local administrator.
    - Copy the **ALICollaboration\_v4-5\_mp1** installer to a temporary location and run it as follows: **\$ ./ALICollaboration\_v4-5\_mp1**
  - **Windows:**
    - Log in to the Collaboration host machine as the local administrator.
    - Copy the **ALICollaboration\_v4-5\_mp1.exe** installer to a temporary location.
    - Close all unnecessary windows and applications.
    - Double-click **ALICollaboration\_v4-5.exe** to launch the installer.
2. Complete the installation wizard pages according to the settings you planned when you completed the installation worksheets provided in *Installation and Configuration Worksheets for BEA AquaLogic Collaboration 4.5*.

The following tables describe the Collaboration installer wizard pages. The installer wizard pages that appear vary according to your configuration and the selections you choose.

**Table 4-1 Collaboration Installer Wizard Pages**

| Wizard Page           | Description                                                                                                                                                                                                                                                                                                                                               |
|-----------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Introduction          | Provides general information on using the installer.                                                                                                                                                                                                                                                                                                      |
| Choose Components     | Select <b>Custom</b> or <b>Complete</b> .<br><br>If you select Complete, a full set of Collaboration components are installed. If you select Custom, you can select individual components to install according to your deployment plan.                                                                                                                   |
| Choose Install Folder | Accept the default installation folder or select a different folder in which to install Collaboration.<br><br>Default: <ul style="list-style-type: none"> <li>• <b>UNIX/Linux:</b> /opt/bea/alui</li> <li>• <b>Windows:</b> C:\bea\alui</li> </ul> In the rest of this guide, the default installation folder will be referred to as <i>install_dir</i> . |
| Database Settings     | Enter the database user login name and database name for the Collaboration database.                                                                                                                                                                                                                                                                      |

**Table 4-1 Collaboration Installer Wizard Pages**

| Wizard Page                               | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|-------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Portal Settings: Portal Database          | Enter the type of database used by the portal. Collaboration must use the same database type as the portal.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| Configuration Manager - Update            | This page is displayed if an existing installation of Configuration Manager 1.0 is detected. Select if you want to update the password or port information for Configuration Manager or use the existing settings.                                                                                                                                                                                                                                                                                                                                                                                     |
| Configuration Manager - Port and Password | <p>Type the port number on which you want Configuration Manager to service Collaboration requests.</p> <p>By default, the port number is 12345. After running the installer, you will be able to access Configuration Manager by using the following URL:<br/> <a href="https://localhost:port_number">https://localhost:port_number</a>.</p> <p>Also type and confirm the Administrator password that you will use to log into Configuration Manager. The password is case-sensitive.</p>                                                                                                             |
| Path to Image Service Files               | <p>Install Image Service files on the computer on which the Image Service is installed. The path should lead to the directory where the Image Service is installed.</p> <ul style="list-style-type: none"> <li>• C:\bea\alui\ptimages (Windows)</li> <li>• /opt/bea/alui/ptimages (UNIX)</li> </ul> <p>Before clicking <b>Next</b>, verify that security for the Image Service directory is appropriately configured to allow for installation of the Image Service files.</p> <ul style="list-style-type: none"> <li>• After you have entered the required information, click <b>Next</b>.</li> </ul> |
| Pre-Installation Summary                  | <p>Review the list of components to be installed.</p> <p>Click <b>Install</b>.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| Launch Configuration Manager              | <p>Launch Configuration Manager.</p> <p>Log in to Configuration Manager using the user name Administrator and the password you specified. Follow the instructions in Configuration Manager to complete all configurations with missing or incorrect settings.</p> <p>When you have completed all Configuration Manager tasks, return to the installer and click <b>Next</b>.</p>                                                                                                                                                                                                                       |

**Table 4-1 Collaboration Installer Wizard Pages**

| Wizard Page                       | Description                                                                                                                                                                                                                                                                                                         |
|-----------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Application Settings Confirmation | Select <b>Yes</b> if you have completed configuration of the Collaboration settings.<br><br>Select <b>No, configure later</b> to complete the installer without configuring the Collaboration settings. You must run Configuration Manager and configure your Collaboration settings before starting Collaboration. |
| Install Complete                  | ( <b>Windows Only</b> ) Choose to restart the system now or restart it manually. The system must be restarted to complete the installation.<br><br>Click <b>Done</b> .                                                                                                                                              |

## Deploying Collaboration on WebLogic Server

The Collaboration installer automatically deploys Collaboration on the Embedded Servlet Engine. You can choose to deploy Collaboration on WebLogic Server instead of the Embedded Servlet Engine.

**Important:** If you choose to deploy Collaboration on WebLogic Server, you should disable the **BEA ALI Collaboration Service** that is installed by the installer on Windows machines. You will not be able to start and stop Collaboration using Configuration Manager.

To deploy Collaboration on WebLogic Server:

1. Identify a domain on which to deploy Collaboration, or create a new domain. Refer to your WebLogic Server documentation for details on creating a new domain.
2. In the portal's **config.xml** file for the domain on which the portal is deployed, add the following line at the end of the <security-configuration> tag:

```
<enforce-valid-basic-auth-credentials>false</enforce-valid-basic-auth-credentials>
```

This disables basic authentication for the domain, and is necessary for WebDAV to work properly.

**Note:** The <enforce-valid-basic-auth-credentials> line must be the last entry in the <security-configuration> tag for the setting to take effect.

3. Add the following text to the setDomainEnv.sh or setDomainEnv.cmd file of the domain:

- **On UNIX/Linux, add the following to `setDomainEnv.sh`. You must add this as one line of code:**

```
JAVA_OPTIONS="$ {SAVE_JAVA_OPTIONS}
-Dbid.application.config=PT_HOME/settings
-Dplumtree.application.config=PT_HOME/settings
-Dbid.application=PT_HOME/ptcollab/4.5
-Dplumtree.application=PT_HOME
```

- **On Windows, add the following to `setDomainEnv.cmd`. You must add this as one line of code:**

```
set JAVA_OPTIONS=%SAVE_JAVA_OPTIONS%
-Dbid.application.config=PT_HOME\settings
-Dplumtree.application.config=PT_HOME\settings
-Dbid.application=PT_HOME\ptcollab\4.5
-Dplumtree.application=PT_HOME
```

Enter the actual value of `PT_HOME` in the file. `PT_HOME` is the same value as *install\_dir*. By default, the value for *install\_dir* is `/opt/BEA/alui` on UNIX/Linux and `C:\BEA\alui` on Windows.

4. Start the WebLogic domain.
5. Deploy **collab.ear**, located in the following location, as an application in the Weblogic domain:

**UNIX/Linux:** *install\_dir*/ptcollab/4.5/webapp/

**Windows:** *install\_dir*\ptcollab\4.5\webapp\

Refer to your WebLogic Server documentation for details on how to deploy an application.

6. Update the Collaboration application settings in Configuration Manager to reflect the correct port numbers for the Collaboration UI:
  - a. Launch Configuration Manager.
  - b. In the application list on the left, under Collaboration, click **Application Settings**.
  - c. Update the values of **HTTP port** and **HTTPS port** with the port numbers used by the Collaboration domain in WebLogic.

- d. Click **SAVE**.
- 7. Update the URL of the Collaboration remote server:
  - a. Log in to the portal.
  - b. Navigate to the Collaboration remote server object in the **Admin Object Directory** and open it for editing.
  - c. On the Main Settings page, set the port number of the **Base URL** to the port number of the Collaboration application in WebLogic.
  - d. Click **Finish**.
- 8. In Collaboration's **config.xml** file for the domain on which Collaboration is deployed, add the following line at the end of the <security-configuration> tag:

```
<enforce-valid-basic-auth-credentials>false</enforce-valid-basic-auth-credentials>
```

This disables basic authentication for the domain, and is necessary for WebDAV and Collaboration RSS Feeds to work properly.

**Note:** The <enforce-valid-basic-auth-credentials> line must be the last entry in the <security-configuration> tag for the setting to take effect.

## Scripting the Collaboration and Portal Databases

After the Collaboration installer has completed installation, you must script the Collaboration and portal databases. You must have administrator privileges for the portal database. Perform the procedure that is appropriate to your database vendor.

## Scripting the Databases on Microsoft SQL Server

This section describes how to create and configure the Collaboration database schema, as well as configure the portal database schema for Collaboration. The following table describes the scripts that you use to perform this task:

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

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

To script the databases on Microsoft SQL Server:

- Script the Collaboration database by following the steps in [“Scripting the Collaboration Database on Microsoft SQL Server” on page 4-10](#).
- Script the portal database by following the steps in [“Scripting the Portal Database on Microsoft SQL Server” on page 4-10](#).

### Scripting the Collaboration Database on Microsoft SQL Server

Run the following database scripts as the Collaboration database user on the Collaboration database:

1. To delete previous tables (if they exist) and create the tables required for Collaboration, run the `install_dir\ptcollab\4.5\sql\mssql\collaboration-server-create-tables.sql` script.
2. To create the objects required by Collaboration, run the `install_dir\ptcollab\4.5\sql\mssql\collaboration-server-data.sql` script.
3. To grant the portal database user Read access to tables in the Collaboration database, run the `install_dir\ptcollab\4.5\sql\mssql\collaboration-server-portal-role-grant.sql` script.

### Scripting the Portal Database on Microsoft SQL Server

Run the following database scripts on the portal database as the `sa` user:



1. To create Collaboration objects in the portal database, run the *install\_dir\ptcollab\4.5\sql\mssql\portal-collaboration-server-data.sql* script.
2. To grant the Collaboration database user Read access to tables in the portal database, run the *install\_dir\ptcollab\4.5\sql\mssql\portal-collaboration-server-role-grant.sql* script.

## Scripting the Database on Oracle

This section describes how to create and configure the Collaboration database schema, as well as configure the portal database schema for Collaboration. The following table describes the scripts that you use to perform this task:

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

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

Perform the following procedure to run the scripts:

1. Perform the following on the portal database server:
  - a. Create the directory `%ORACLE_HOME%\ptcollabscripts`.
  - b. 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. 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 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, 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 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 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 ALI 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 ALI 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
```

13. Restart the portal.

## Scripting a DB2 Database on UNIX for Collaboration

This topic describes how to script a DB2 database on UNIX for use with Collaboration.

**Note:** For this release, BEA does not support scripting a DB2 database on Windows for Collaboration.

Before scripting a DB2 database for Collaboration:

- Ensure that the data for the AquaLogic Interaction and ALUI Directory applications is stored in distinct schemas on the same DB2 database.
- Create a distinct schema for the Collaboration database on the same DB2 database that contains the schemas for the AquaLogic Interaction and ALUI Directory applications.

- Have your DB2 database administrator examine and, if necessary, customize the SQL scripts before you use them. Each SQL file contains comments that describe the customizations that might be necessary.

**Note:** The Collaboration SQL scripts for DB2 include hard-coded schema names for the Collaboration and portal databases. In the **collaboration-server-create-tables.sql**, **collaboration-server-data.sql**, and **collaboration-server-portal-role-grant.sql** scripts, the hard-coded name for the Collaboration schema is *COLLAB*. If you updated the Collaboration schema name to anything other than *COLLAB*, you must navigate to Configuration Manager, Collaboration application, Collaboration Database component, and update the **Schema Name** setting to match the updated Collaboration schema name.

In the **portal-collaboration-server-role-grant.sql** and **portal-collaboration-server-data.sql** scripts, the hard-coded name for the portal schema is *ALUI*. If you updated the portal schema name to anything other than *ALUI*, you must update these scripts to match the updated portal schema name. Additionally, you must navigate to Configuration Manager, Collaboration application, Collaboration Settings component, and update the **Linked database alias** setting to match the updated portal schema name. Make sure to add *.dbo.* to the end of the portal schema name. For example, if the portal schema name is *alidbuser*, the value that you type into the Linked database alias setting should be *alidbuser.dbo.*

Use the DB2 command line processor to run the SQL scripts against your DB2 database. Comments in the header of each SQL file contain recommended syntax for the DB2 command line processor.

To script a DB2 database for Collaboration:

1. Copy SQL scripts from the Collaboration installation directory to your DB2 database server.

The scripts are located in: *install\_dir/ptcollab/4.5/sql/db2*

2. As a user with administrative privileges, run the these scripts in the following order:

- a. **create\_collab\_schema.sql**
- b. **create\_collab\_tablespace\_unix.sql**
- c. **grant\_collab\_user.sql**
- d. **collaboration-server-create-tables.sql**
- e. **collaboration-server-data.sql**
- f. **collaboration-server-portal-role-grant.sql**

g. **portal-collaboration-server-role-grant.sql**

h. **portal-collaboration-server-data.sql**

## Configuring the Image Service for Notification Emails

If your Image Service is deployed on IIS, you must register two new MIME types in IIS so that email notifications will work properly.

To configure IIS for notification emails:

1. On the machine hosting the Image Service, open the **Internet Information Services (IIS) Manager**, right-click the local computer name, and click **Properties**.
2. Click **MIME Types**.
3. Click **New**. This opens the MIME Type dialogue box.
4. Type `.nst` in the **Extension** box.
5. Type `text/plain` in the **MIME type** box.
6. Click **OK** in the MIME Type dialogue box.
7. Repeat steps 3-6, entering `inc` in the **Extension** box.
8. Click **OK** to save the new settings.
9. Click **OK** in the Properties dialogue box.
10. Restart the World Wide Web Publishing Service so that the changes take effect.

## Importing the Collaboration Migration Package

This section describes how to import the Collaboration migration package.

To import the Collaboration migration package:

1. Verify that the Search Server is running.
2. Log on to the portal as a user who has administrative rights.

3. From the Administration Select Utility drop-down list, use the Migration - Import utility to import the **collaboration.ptc** file, which is located in the following location on the Collaboration host machine:

- **UNIX/Linux:** *install\_dir/ptcollab/4.5/serverpackages/*
- **Windows:** *install\_dir\ptcollab\4.5\serverpackages\*

Select **Overwrite Remote Servers**. If necessary, adjust other import settings.

For details on using the Migration - Import utility, see *Administrator Guide for BEA AquaLogic Interaction*.

## Starting and Verifying the Installation

This section describes how to start Collaboration and verify the installation.

### Verifying AquaLogic Interaction Services

Verify that the following AquaLogic Interaction services are running:

- Search Server
- API Service
- Automation Service
- Document Repository Service
- LDAP Directory Service
- Notification Service

For details on starting AquaLogic Interaction services, see *Installation Guide for BEA AquaLogic Interaction*.

### Starting the Collaboration Services

This section describes how to start the Collaboration services. Follow the procedure appropriate to your environment. Depending on your configuration, all services may not be installed on the same host machine. In this case, perform each step on the host machine where the service is installed.

## Starting the Collaboration Services on UNIX/Linux

To start the Collaboration services on UNIX/Linux:

1. Start the Search Service used by Collaboration:
  - a. `cd to /opt/bea/alui/searchservice/1.1/bin`
  - b. `run ./searchserviced.sh start`
2. Start Collaboration:
  - a. Verify that the AquaLogic Notification Service is started.
  - b. `cd to /opt/bea/alui/ptcollab/4.5/bin`
  - c. `run ./ptcollaborationd.sh start`

**Note:** If Collaboration is deployed on WebLogic Server, start the WebLogic domain on which Collaboration is deployed. Do not start the Collaboration daemon.

You can also start and stop the Collaboration services using Configuration Manager. Log in to Configuration Manager using the user name Administrator and the password you specified during installation. Follow the instructions in Configuration Manager to start each service. If Collaboration is deployed on WebLogic Server, you cannot start it from Configuration Manager.

## Starting the Collaboration Services on Windows

To start the Collaboration services on Windows:

1. Click **Start > Control Panel > Administrative Tools > Services**.
2. Start **BEA ALI Search Service**.
3. Verify that the AquaLogic Notification Service is started.
4. Start **BEA ALI Collaboration**.

**Note:** If Collaboration is deployed on WebLogic Server, start the WebLogic domain on which Collaboration is deployed. Do not start the BEA ALI Collaboration service.

You can also start and stop the Collaboration services using Configuration Manager. Log in to Configuration Manager using the user name Administrator and the password you specified during installation. Follow the instructions in Configuration Manager to start each service. If Collaboration is deployed on WebLogic Server, you cannot start it from Configuration Manager.

## Running the Diagnostics Utility

To verify that Collaboration is functioning correctly, access and analyze the Collaboration Diagnostics page:

`http://<mycollabserver>:<mycollabport>/collab/admin/diagnostic`

For more information on using the Collaboration Diagnostics page, see *Administrator Guide for BEA AquaLogic Interaction Collaboration*.

Check the **collaboration.log** file for any errors. This file is found in the `/opt/bea/alui/ptcollab/4.5/settings/logs` directory.



# Upgrade

This chapter describes the process of upgrading from previous versions of Collaboration to the current version.

To upgrade Collaboration:

1. Review the supported upgrade paths. For details, see [“Upgrade Paths” on page 5-2](#).
2. Follow the appropriate upgrade procedure for your existing version of Collaboration.

# Upgrade Paths

This section describes the paths that are available to upgrade to Collaboration 4.5 MP1.

**Note:** All upgrade paths are between two systems of the same operating system brand, but not necessarily the same operating system version. Check current hardware and software requirements and make any required upgrades to operating system or database software prior to proceeding with the Collaboration upgrade.

| Upgrade Path                                                 | Upgrade References                                                                                                                |
|--------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------|
| Collaboration 4.2, 4.2 MP1 to Collaboration 4.5 MP1          | Follow the procedure described in <a href="#">“Upgrading from Collaboration 4.x to Collaboration 4.5 MP1” on page 5-2.</a>        |
| Collaboration 4.1, 4.1 SP1, 4.1 SP2 to Collaboration 4.5 MP1 |                                                                                                                                   |
| Collaboration 4.0.2 to Collaboration 4.5 MP1                 |                                                                                                                                   |
| Collaboration Server 3.x to Collaboration 4.5 MP1            | Follow the procedure described in <a href="#">“Upgrading from Collaboration Server 3.x to Collaboration 4.5 MP1” on page 5-3.</a> |
| Collaboration Server 2.x to Collaboration 4.5 MP1            | Follow the procedure described in <a href="#">“Upgrading from Collaboration Server 2.x to Collaboration 4.5 MP1” on page 5-3.</a> |

# Upgrading from Collaboration 4.x to Collaboration 4.5 MP1

This section describes how to upgrade from Collaboration 4.x to Collaboration 4.5 MP1.

To upgrade from Collaboration 4.x to Collaboration 4.5 MP1:

1. Run the Collaboration installer. For details, see [“Running the Installer During Upgrade” on page 5-4.](#)
2. Upgrade the portal and Collaboration databases. Run the Collaboration database upgrade script appropriate for your previous version of Collaboration. For details, see [“Upgrading the Portal and Collaboration Databases” on page 5-5.](#)

3. Import the Collaboration migration package. For details, see [“Importing the Collaboration Migration Package” on page 4-15.](#)
4. **(Image Service on IIS only)** Configure the Image Service to work with the AquaLogic Notification Service. For details, see [“Starting and Verifying the Installation” on page 4-16.](#)
5. Start Collaboration and verify the installation. For details, see [“Starting and Verifying the Installation” on page 4-16.](#)
6. Rebuild the Collaboration search collection. For details, see [“Rebuilding the Collaboration Search Collection” on page 5-6.](#)

## Upgrading from Collaboration Server 3.x to Collaboration 4.5 MP1

This section describes how to upgrade from Collaboration Server 3.x to Collaboration 4.5 MP1.

If you are currently running Collaboration Server 3.x, you must first upgrade to Collaboration Server 4.0.2. Refer to the *Installation Guide for Plumtree Collaboration Server 4.0.2* for information on this upgrade path.

After upgrading to Collaboration Server 4.0.2, upgrade to Collaboration 4.5 MP1 according to the instructions described in [“Upgrading from Collaboration 4.x to Collaboration 4.5 MP1” on page 5-2.](#)

## Upgrading from Collaboration Server 2.x to Collaboration 4.5 MP1

This section describes how to upgrade from Collaboration Server 2.x to Collaboration 4.5 MP1.

If you are currently running Collaboration Server version 2.x, you must first upgrade to Collaboration Server 3.0.2. Refer to the *Installation Guide for Plumtree Collaboration Server 3.0* for information on this upgrade path.

After upgrading to Collaboration Server 3.0.2, you must upgrade to Collaboration Server 4.0.2. Refer to the *Installation Guide for Plumtree Collaboration Server 4.0.2* for information on this upgrade path.

After upgrading to Collaboration Server 4.0.2, upgrade to Collaboration 4.5 MP1 according to the instructions described in .

**Note:** **UNIX/Linux users** - Collaboration 3.x was released only on Windows. The installation of 3.0.2 must take place on a Windows machine.

# Running the Installer During Upgrade

To run the installer during upgrade:

1. Back up 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 Collaboration.
3. If you have an existing Notification Service from your previous installation of Collaboration, disable or uninstall it. The Notification Service that was previously included in the Collaboration installer has been replaced by the AquaLogic Notification Service and is included in the AquaLogic Interaction installer. The AquaLogic Notification Service is a required component of AquaLogic Interaction and should be installed and configured as part of your AquaLogic Interaction installation.
4. Stop the Search Server, Automation Service, and Document Repository Service.
5. Back up the Document Repository directory on the file system. By default, this directory is located in:
  - **(UNIX/Linux)** /opt/bea/alui/ptdr/documents/PTCollab
  - **(Windows)** C:\bea\alui\ptdr\documents\PTCollab
6. Clear the Embedded Servlet Engine's work directory. This allows you to recover your data if there is a problem during installation. By default, this directory is located in:
  - **(UNIX/Linux)** /opt/bea/alui/common/container/tomcat/<version>/work
  - **(Windows)** C:\bea\alui\common\container\tomcat\<version>\work
7. Copy the installer file to the directory where you installed the previous version of Collaboration. 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 B-1](#).

If you want to install to a new location or do not want to use the silent properties file, you can launch the installer from any location on the Collaboration host machine.

8. Install the Collaboration components as described in [“Installing the Collaboration Components” on page 4-3](#).
9. **(Windows only)** When the installer prompts you, reboot the machine. If you do not reboot, certain PATH environment variable changes might not take effect, and you will get errors when you try to deploy and start the applications.

## Upgrading the Portal and Collaboration Databases

This section describes how to upgrade the portal and Collaboration databases.

**Note:** If you are upgrading Oracle from 10.1.x to 10.2.x or SQL Server from 2000 to 2005, you should perform the Oracle or SQL Server upgrade before upgrading the databases.

Run the upgrade scripts appropriate to your database vendor. The upgrade scripts are located in:

**Microsoft SQL Server:**

- *install\_dir\ptcollab\4.5\sql\mssql\*

**Oracle:**

- *install\_dir/ptcollab/4.5/sql/oracle/unix/*
- *install\_dir\ptcollab\4.5\sql\oracle\windows\*

Follow the database upgrade instructions appropriate to your previous version of Collaboration as described in the following table:

| Upgrade Path                         | Database Upgrade Instructions                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|--------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 4.2 MP1 to 4.5 MP1<br>4.2 to 4.5 MP1 | As the Collaboration database user, run the following script on the Collaboration database: <ul style="list-style-type: none"><li>• <b>collaboration-server-4.2.0-to-4.5.0-upgrade.sql</b></li></ul>                                                                                                                                                                                                                                                                                                                                                                                                        |
| 4.1 SP2 to 4.5 MP1                   | As the Collaboration database user, run the following scripts in sequential order on the Collaboration database: <ul style="list-style-type: none"><li>• <b>collaboration-server-4.1.2-to-4.2.0-upgrade.sql</b></li><li>• <b>collaboration-server-4.2.0-to-4.5.0-upgrade.sql</b></li></ul> As the portal database user, run the following script on the portal database: <ul style="list-style-type: none"><li>• <b>portal-collaboration-server-upgrade.sql</b></li></ul>                                                                                                                                   |
| 4.1 SP1 to 4.5 MP1<br>4.1 to 4.5 MP1 | As the Collaboration database user, run the following scripts in sequential order on the Collaboration database: <ul style="list-style-type: none"><li>• <b>collaboration-server-4.1.1-to-4.1.2-upgrade.sql</b></li><li>• <b>collaboration-server-4.1.2-to-4.2.0-upgrade.sql</b></li><li>• <b>collaboration-server-4.2.0-to-4.5.0-upgrade.sql</b></li></ul> As the portal database user, run the following script on the portal database: <ul style="list-style-type: none"><li>• <b>portal-collaboration-server-upgrade.sql</b></li></ul>                                                                  |
| 4.0.2 to 4.5 MP1                     | As the Collaboration database user, run the following scripts in sequential order on the Collaboration database: <ul style="list-style-type: none"><li>• <b>collaboration-server-4.0.2-to-4.1.1-upgrade.sql</b></li><li>• <b>collaboration-server-4.1.1-to-4.1.2-upgrade.sql</b></li><li>• <b>collaboration-server-4.1.2-to-4.2.0-upgrade.sql</b></li><li>• <b>collaboration-server-4.2.0-to-4.5.0-upgrade.sql</b></li></ul> As the portal database user, run the following script on the portal database: <ul style="list-style-type: none"><li>• <b>portal-collaboration-server-upgrade.sql</b></li></ul> |

# Rebuilding the Collaboration Search Collection

This section describes how to rebuild the Collaboration search collection.

To rebuild the Collaboration search collection:

1. Log on to the portal as a portal administrator.
2. Click **Administration**.
3. Choose the **Collaboration Administration** utility.
4. Click **Search Service**.
5. Click **Rebuild Search Collection**.
6. Click **OK**.

## Upgrade



# Installing the Exchange Remote API to Enable Groupware Integration

This appendix describes how to install the Exchange Remote API, which you use to integrate with Microsoft Exchange.

**Note:** The Exchange Remote API must be installed on a Windows machine. You can install the Exchange Remote API on either the Collaboration host or on a different machine. You can run the Exchange Remote API installer before or after installing Collaboration.

To install the Exchange Remote API:

1. Install .NET 2.0 on the machine that will host the Exchange Remote API.  
This must be downloaded from the Microsoft Web site (<http://www.microsoft.com/>).
2. Install Microsoft Web Services Enhancement 2.0 on the machine that will host the Exchange Remote API.  
This must be downloaded from the Microsoft Web site (<http://www.microsoft.com/>).
3. Install the Exchange Remote API. For details, see [“Running the Exchange Remote API Installer” on page A-2](#).
4. Enable Groupware integration using Configuration Manager. This step cannot be completed until after you run the Collaboration installer. For more information on enabling Groupware integration, see *Administrator Guide for BEA AquaLogic Interaction Collaboration*.

# Running the Exchange Remote API Installer

This section describes how to run the Exchange Remote API installer.

To run the Exchange Remote API installer:

1. Double-click the installation file **ALIExchangeRemoteAPI\_v1-0.exe**. This file is located in the Collaboration CD or download, in the same directory as the ALICollaboration\_4-5.exe installation file.
2. Complete the following installer screens:

**Table A-1 Exchange Remote API Installer Screens**

| Installer Screen                 | Description                                                                                                                                                                                                                                                                                                                                                                                       |
|----------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Introduction                     | Provides general information on using the installer.                                                                                                                                                                                                                                                                                                                                              |
| Installation Folder              | Accept the default installation folder or select a different folder in which to install the Exchange Remote API.                                                                                                                                                                                                                                                                                  |
| Select IIS Web Site              | Choose to deploy to the Default Web Site or another Web site.                                                                                                                                                                                                                                                                                                                                     |
| Specify IIS Web Site Information | <p>If you choose to deploy the Exchange Remote API to a Web site other than the default Web site, enter the IIS Web site name, HTTP, and HTTPS ports.</p> <p><b>Note:</b> If the name you enter is not the name of an existing IIS Web site, a new Web site is created. If the Web site already exists, the secure and non-secure ports will be changed to the entries made in the installer.</p> |
| Pre-Installation Summary         | <p>Confirm the installation folder.</p> <p>Click <b>Install</b>.</p>                                                                                                                                                                                                                                                                                                                              |
| Install Complete                 | <p>Choose to restart the system now or restart it manually. The system must be restarted to complete the installation.</p> <p>Click <b>Done</b>.</p>                                                                                                                                                                                                                                              |

# Silent Properties File

When you install Collaboration, the installer creates the file **ptcollab\_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:

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

For example:

```
<full_Path_To_Installer>/ALICollaboration_v4-5_mp1 - f
<full_Path_To_Properties_File>/ptcollab_silent.properties
```

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

Silent Properties File

# Uninstalling Collaboration

This appendix discusses how to uninstall Collaboration.

**Note:** Performing an uninstallation removes the core application from the Collaboration host machine. Removing Collaboration image service files from the Image Service host machine is not supported.

## Uninstalling Collaboration on UNIX/Linux

To uninstall Collaboration on UNIX and Linux platforms, launch the uninstaller for Collaboration 4.5 by navigating to: `/opt/beanuserinteraction/uninstall/ptcollab/4.5/` and running the command `./uninstallAquaLogic_Interaction_Collaboration`.

## Uninstalling Collaboration on Windows

To uninstall Collaboration on Windows, use **Add/Remove Programs** to remove **AquaLogic Interaction Collaboration**.

## Uninstalling Collaboration

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