



# **BEA AquaLogic HiPer Workspace for Retail**

## **Installation Guide**

Version 1.0  
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# Welcome to AquaLogic HiPer Workspace for Retail

This book describes how to install AquaLogic HiPer Workspace for Retail and the accompanying Business Activity Management (BAM) system. This book is written for any person who is responsible for installing and configuring HiPer for use by your users. Prepare your information and resources before performing the tasks described within.

This book provides details for the following basic installation steps:

1. Complete pre-installation steps, such as reading the release notes and configuring compatible, pre-requisite software. For information, see [Chapter 2, “Pre-Installation.”](#)
2. Install HiPer software on the computers that host the Portal Server, the Image Server, and the Automation Server. For information, see [Chapter 3, “Installation.”](#)
3. Complete post-installation steps, such as importing HiPer objects into the portal and configuring the portal to work with HiPer. For information, see [Chapter 4, “Post-Installation.”](#)

## Typographical Conventions

This book uses the following typographical conventions.

Table 1-1: Typographical Conventions

Convention	Typeface	Example
<ul style="list-style-type: none"><li>• File names</li><li>• Folder names</li><li>• Screen elements</li></ul>	<b>bold</b>	<ul style="list-style-type: none"><li>• Upload <b>Procedures.doc</b> to the portal.</li><li>• Open the <b>General</b> folder.</li><li>• To save your changes, click <b>Apply Changes</b>.</li></ul>
<ul style="list-style-type: none"><li>• Text you enter</li></ul>	computer	<ul style="list-style-type: none"><li>• Type Marketing as the name of your community.</li></ul>
Variables you enter	<i>italic com- puter</i>	Enter the base URL for the Portlet Server. For example, <code>http://my_computer/</code> .
<ul style="list-style-type: none"><li>• New terms</li><li>• Emphasis</li><li>• Portal object example names</li></ul>	<i>italic</i>	<ul style="list-style-type: none"><li>• <i>Portlets</i> are Web tools, embedded in your portal.</li><li>• The URI <i>must</i> be a unique number.</li><li>• The example Knowledge Directory displayed in Figure 5 shows the <i>Human Resources</i> folder.</li></ul>

## Icons Used in This Book

This book uses the following icons:



**Note:** The Note icon is used to denote tips, best practices, or additional information related to the content in a paragraph.



**Security:** The Security icon is used to denote important information related to security for your portal.



**Important:** The Important icon is used to denote important information (including warnings) related to the content in a paragraph.

## BEA Documentation and Resources

This section describes the documentation and resources provided by BEA.

*Table 1-2: BEA Documentation and Resources (Sheet 1 of 2)*


Resource	Description
Administrator Guide	<p>This book describes how to manage HiPer users and security, how to customize the user interface and available data to suit the needs of your company, and how to maintain HiPer.</p> <p>It is available in electronic form (PDF) in the release package and the AquaLogic User Interaction Product Center.</p>
Release Notes	<p>These files are written for HiPer administrators. They include information about new features and known issues in the release.</p> <p>They are available in electronic form (HTML) in the AquaLogic User Interaction Product Center.</p>
Online Help	<p>The online help is written for all levels of HiPer users. It describes the user interface for HiPer and gives detailed instructions for completing tasks in HiPer.</p> <p>To access online help, click  <b>Help</b> in the upper-right corner of the banner or dialog box.</p>

Table 1-2: BEA Documentation and Resources (Sheet 2 of 2)

Resource	Description										
AquaLogic User Interaction Support Center	<p>The AquaLogic User Interaction Support Center is a comprehensive repository for technical information on AquaLogic User Interaction products. From the Support Center, you can access products and documentation, search knowledge base articles, read the latest news and information, participate in a support community, get training, and find tools to meet most of your AquaLogic User Interaction-related needs. The Support Center encompasses the following communities:</p> <p><b>Technical Support Center</b></p> <p>Submit and track support incidents and feature requests, search the knowledge base, access documentation, and download service packs and hotfixes.</p> <p><b>Deployment Center</b></p> <p>Find the tools you need to roll out, drive, and maintain a successful deployment. Collaborate with peers on strategic business and technical objectives, learn application best practices, download portal launch examples, and calculate your return on investment (ROI).</p> <p><b>Product Center</b></p> <p>Download products, read Release Notes, access recent product documentation, and view interoperability information.</p> <p><b>Developer Center</b></p> <p>Download developer tools and documentation, get help with your development project, and interact with other developers via discussion forums.</p> <p><b>Education Center</b></p> <p>Find information about available training courses, purchase training credits, and register for upcoming classes.</p> <p>If you do not see the Support Center when you log in to <a href="http://portal.plumtree.com">http://portal.plumtree.com</a>, contact <a href="mailto:support@plumtree.com">support@plumtree.com</a> for the appropriate access privileges.</p>										
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: <a href="mailto:support@plumtree.com">support@plumtree.com</a></p> <p>Phone Numbers:</p> <table> <tr> <td>U.S. and Canada</td><td>+1 415.263.1696 or +1 866.262.PLUM (7586)</td></tr> <tr> <td>Asia Pacific</td><td>+61 2.9931.7822</td></tr> <tr> <td>Europe and U.K.</td><td>+44 (0)1628 589124</td></tr> <tr> <td>France</td><td>+33 1.46.91.86.79</td></tr> <tr> <td>Singapore</td><td>+65 6832.7747</td></tr> </table>	U.S. and Canada	+1 415.263.1696 or +1 866.262.PLUM (7586)	Asia Pacific	+61 2.9931.7822	Europe and U.K.	+44 (0)1628 589124	France	+33 1.46.91.86.79	Singapore	+65 6832.7747
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Singapore	+65 6832.7747										





# 2

## Pre-Installation

You must perform the following basic steps to prepare for your AquaLogic HiPer Workspace for Retail install:

1. Read the product release notes for 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.
2. Provision host computers with the appropriate hardware for your deployment. For details, see [“Hardware Requirements.”](#)
3. Install software dependencies and configure them for your portal deployment. For details, see [“Software Requirements” on page 2-2.](#)
4. Complete the deployment component configuration worksheets provided in [Appendix A, “Configuration Worksheets.”](#)

## Hardware Requirements

This section summarizes recommended and minimum hardware requirements for computers that host HiPer components.

*Table 2-1: Hardware Requirements*

Recommended Hardware	Minimum Hardware
1 Ghz or faster processor	600 MHz Pentium III processor
1 GB ECC RAM or more	512 MB RAM
10 GB storage	4 GB storage
2 GB temp directory	1 GB temp directory

## Software Requirements

You must confirm that you have the correct software before you install AquaLogic HiPer Workspace for Retail. This section summarizes operating system and software requirements for HiPer components at the time of this release. For the most current platform support information, refer to the *Interoperability Matrix*: log in to: <http://portal.plumtree.com>, navigate to the Product Center, and click **Interoperability**.

### Supported Operating Systems

At the time of release, AquaLogic HiPer Workspace for Retail 1.0 supports the following operating systems:

- Windows 2000 Server SP4
- Windows 2003 Server

### Supported Database Systems

At the time of release, HiPer 1.0 supports the following database systems:

- Oracle 9i
- Oracle 9.2.0.6
- Microsoft SQL Server 2000 SP4



**Important:** You must use the same database system and version for the HiPer database as you use for your Portal database.

### Supported Browsers

At the time of release, HiPer 1.0 supports the following browsers:

- Internet Explorer 5.5
- Internet Explorer 6.0
- Netscape 7.1
- Netscape 7.2
- Firefox 1.0

### Supported AquaLogic Products

At the time of release, HiPer 1.0 supports the following AquaLogic products:

- Portal 5.0.4 with HotFix (HF) #210394
- Content Server 6.1.0 with HF #201492

### Java Support for the ALI HiPer BAM System Machine

The machine that hosts the ALI HiPer BAM System must include Java JDK 1.4.x to run JBoss. The Java JDK is available from <http://java.sun.com>. Once installed, set the JAVA\_HOME environment variable to point to the installed location of the JDK.

# 3

## Installation

This chapter describes how to install the components necessary for your HiPer deployment. Before you perform these steps, you must have confirmed that you have the appropriate software. We also suggest you complete the deployment component configuration worksheets provided in [Appendix A, “Configuration Worksheets”](#) to make your installation easier and faster; the worksheets also provide a reference as to what you did during install, allowing you to refer back to them if necessary.

The sections in this chapter describe the following basic steps you take to install AquaLogic HiPer Workspace for Retail:

1. Create the HiPer database. For details, see [“Create the HiPer Database” on page 3-1](#).
2. Run the HiPer installer on the machine that you want to host the HiPer application. For details, see [“Run the HiPer Server Install” on page 3-2](#).
3. Run the HiPer installer on the machine that hosts the Portal Server to install custom navigation files and files that create the portal objects needed for HiPer as well as data for Content Server. For details, see [“Run the Portal Server Install” on page 3-3](#).
4. Run the HiPer installer on the machine that hosts the Image Server to install images, help files, and other static files used by HiPer. For details, see [“Run the Image Server Install” on page 3-3](#).
5. Run the HiPer installer on the machine that hosts the Automation Server to install automated HiPer tasks. For details, see [“Run the Automation Server Install” on page 3-4](#).
6. Install the HiPer BAM (Business Activity Manager) Server. For details, see [“Install the ALI HiPer BAM System” on page 3-5](#).

### Create the HiPer Database

HiPer requires a database to store metadata relating to the structure of your organization. This database must be the same version as the Portal database.

To create the HiPer database:

1. Create a user to own the HiPer database (we refer to this user as the HiPer user).
2. Create the HiPer database. Do not run any database scripts at this point.
3. Grant the HiPer user owner rights to the HiPer database.

## Run the HiPer Server Install

Perform the following steps on the machine that you want to host HiPer Server:

1. Run the HiPer installer (AquaLogicInteractionHiPer.exe).
2. On the Introduction page, click **Next**.
3. On the License Agreement page, read the agreement, click **I accept the terms of the License Agreement**, then click **Next**.
4. On the Choose Components page, choose **HiPer** and click **Next**.
5. On the Installation Folder page, specify where you want HiPer installed. The default is C:\Program Files\plumtree. If you want to install in another folder, type the path in the box, or click **Choose**. If you change your mind and want to install in the default folder, click **Restore Default Folder**. When you are done, click **Next**.
6. On the AquaLogic HiPer Workspace for Retail - Application Port page, specify the port through which HiPer should handle requests (for example, http://<hiperportal>:<port>). Choose **http** (unsecured), then, in the text box, type the port through which HiPer should handle requests. When you are done, click **Next**.
7. On the HiPer Database page, choose your database server—**SQL Server** or **Oracle**, and click **Next**.
8. On the HiPer Database Connection Information page, enter the following values, and click **Next**:
  - a. HiPer Database Host Computer
  - b. HiPer Database Port
  - c. HiPer Database Name
  - d. HiPer Database Login
  - e. HiPer Database Password
  - f. HiPer Database Password Confirmation
9. On the Portal Database Connection Information page, enter the following values, and click **Next**:
  - a. Portal Database Host Computer
  - b. Portal Database Port
  - c. Portal Database Name
  - d. Portal Database Login
  - e. Portal Database Password
  - f. Portal Database Password Confirmation
10. On the Pre-Installation Summary page, confirm the installer settings (install folder, components to install, and space needed for install), and click **Install**.

## Run the Portal Server Install

Perform the following steps on the machine that hosts Portal Server:

1. On the Introduction page, click **Next**.
2. On the License Agreement page, read the agreement, click **I accept the terms of the License Agreement**, then click **Next**.
3. On the Choose Components page, choose **Portal Files** and click **Next**.
4. On the Choose Portal Server Folder page, specify where the Portal Server is installed. The default installation folder is C:\Program Files\plumtree\ptportal\5.0. If the Portal Server is installed in another location, type the path in the box, or click **Choose**. To restore the default folder path, click **Restore Default Folder**. When you are done, click **Next**.
5. On the Pre-Installation Summary page, confirm the installer settings (install folder, components to install, and space needed for install), and click **Install**.

## Run the Image Server Install

Perform the following steps on the machine that hosts the Image Server:

1. On the Introduction page, click **Next**.
2. On the License Agreement page, read the agreement, click **I accept the terms of the License Agreement**, then click **Next**.
3. On the Choose Components page, choose **Image Service Files** and click **Next**.
4. On the Choose Image Server Folder page, specify where you the Image Server files are installed. The default is C:\Program Files\plumtree\ptimages. If the Image Server files are installed in another location, type the path in the box, or click **Choose**. To restore the default folder path, click **Restore Default Folder**. When you are done, click **Next**.
5. On the Pre-Installation Summary page, confirm the installer settings (install folder, components to install, and space needed for install), and click **Install**.

## Run the Automation Server Install

Perform the following steps on the machine that hosts Automation Server:

1. On the Introduction page, click **Next**.
2. On the License Agreement page, read the agreement, click **I accept the terms of the License Agreement**, then click **Next**.
3. On the Choose Components page, choose **Automation Service** and click **Next**.
4. On the Choose Automation Server Folder page, specify where the Automation Server is installed. The default is C:\Program Files\plumtree\ptportal\5.0. If the Automation Server is installed in another location, type the path in the box, or click **Choose**. To restore the default folder path, click **Restore Default Folder**. When you are done, click **Next**.
5. On the HiPer Database page, choose your database server—**SQL Server** or **Oracle**, and click **Next**.
6. On the HiPer Database Connection Information page, enter the following values, and click **Next**:
  - a. HiPer Database Host Computer
  - b. HiPer Database Port
  - c. HiPer Database Name
  - d. HiPer Database Login
  - e. HiPer Database Password
  - f. HiPer Database Password Confirmation
7. On the Portal Database Connection Information page, enter the following values, and click **Next**:
  - a. Portal Database Host Computer
  - b. Portal Database Port
  - c. Portal Database Name
  - d. Portal Database Login
  - e. Portal Database Password
  - f. Portal Database Password Confirmation
8. On the Pre-Installation Summary page, confirm the installer settings (install folder, components to install, and space needed for install), and click **Install**.

## Install the ALI HiPer BAM System

The ALI HiPer BAM System connects to your back-end systems and triggers alerts by monitoring rule templates. The rule templates are created within the ALI HiPer BAM System and connected to HiPer via rules that are defined in HiPer.



**Important:** The machine that hosts the ALI HiPer BAM System must include Java JDK 1.4.x to run JBoss. The Java JDK is available from <http://java.sun.com>. Once installed, set the JAVA\_HOME environment variable to point to the installed location of the JDK.

Perform the following steps on the machine that you want to host the ALI HiPer BAM System:

1. Copy the **HiPer\_1.0\_BAM\_Service.zip** file (available in the AquaLogic User Interaction Product Center) to the host computer and unzip the files.
2. Create a new database called **cq3\_7\_metadata**.
3. Replace the Database Machine Name, User Name, and Password in the following files:

- **<BAM\_system\_home>\initmetadata\_DB\_3\_7\cqinitmetadata\_cmd.bat**

Here are the contents of that file:

```
java -cp cqinitmetadata.jar;msutil.jar;msbase.jar;mssqlserver.jar com.celquest.metadata.upgrade.Upgrade SQLSERVER "jdbc:microsoft:sqlserver://[INSERT SERVER NAME HERE]:1433;SelectMethod=cursor;databaseName=cq3_7_metadata;user=[INSERT USER NAME HERE];password=[INSERT PASSWORD HERE]"
```

- **<BAM\_system\_home>\jboss-3.2.6\server\default\deploy\celequest\_metadata-ds.xml**

Here are the contents of that file:

```
<?xml version="1.0" encoding="UTF-8"?>

<datasources>
  <local-tx-datasource>

    <jndi-name>com.celquest.metadata.metaDataSource</jndi-name>

    <connection-url>jdbc:microsoft:sqlserver://[INSERT SERVER NAME HERE]:1433;SelectMethod=cursor;databaseName=cq3_7_metadata;user=[INSERT USER NAME HERE];password=[INSERT PASSWORD HERE]</connection-url>
    <driver-class>com.microsoft.jdbc.sqlserver.SQLServerDriver</driver-class>

    <!-- The login and password -->
    <user-name>[INSERT USER NAME HERE]</user-name>
    <password>[INSERT PASSWORD HERE]</password>

    <min-pool-size>5</min-pool-size>
    <max-pool-size>20</max-pool-size>
    <idle-timeout-minutes>5</idle-timeout-minutes>
    <track-statements>false</track-statements>
    <application-managed-security/>

  </local-tx-datasource>
</datasources>
```

4. Run the **<BAM\_system\_home>\initmetadata\_DB\_3\_7\cqininitmetadata\_cmd.bat** file from the command line to create the metadata for the database.
5. Run the **<BAM\_system\_home>\jboss-3.2.6\bin\InstallApp-NT.bat** file to install it as a Windows service.
6. Start the Windows service named **ALI HiPer BAM System**.
7. Check the following logs:
  - **<BAM\_system\_home>\jboss-3.2.6\server\default\log\server.log**
  - **<BAM\_system\_home>\jboss-3.2.6\bin\wrapper.log**

If the wrapper.log shows a port conflict exception, you must change the ports in

**<BAM\_system\_home>\jboss-3.2.6\server\default\conf\jboss-service.xml**

8. Check to make sure the application can start by browsing to the following URL: <http://localhost:8049/celequest/login/workbench.htm>. You will be asked to enter two paths for logging, as well as information for an SMTP server. Because you will later delete the E-mail delivery profile, you can enter inaccurate information for the SMTP server.



# 4

## Post-Installation

This chapter describes the following basic steps you take to configure and customize your AquaLogic HiPer Workspace for Retail deployment:

1. Create a connection between the BAM stem and the back-end systems you want to monitor. For details, see [“Integrate Your Back-End Systems with the ALI HiPer BAM System” on page 4-2.](#)
2. Configure the delivery profile in the ALI HiPer BAM System so that alerts are correctly sent to HiPer. For details, see [“Configure the ALI HiPer BAM System to Communicate with HiPer” on page 4-5.](#)
3. Set up the HiPer database:
  - a. Run the database scripts to create the HiPer tables and load seed data into them. For details, see [“Run the HiPer Database Scripts” on page 4-6.](#)
  - b. Create categories for notifications and tips to help users find what they need. For details, see [“Create Custom Categories for Notifications and Tips” on page 4-6.](#)
  - c. Show HiPer how the information returned by the ALI HiPer BAM System relates to your company’s hierarchical levels. For details, see [“Map ALI HiPer BAM System Levels to Your Company’s Hierarchical Levels” on page 4-6.](#)
4. Import the HiPer information into Content Server. For details, see [“Migrate HiPer Information Into Content Server” on page 4-6.](#)
5. Configure HiPer on the Portal Server:
  - a. Import the portal objects needed by HiPer. For details, see [“Import HiPer Portal Objects” on page 4-7.](#)
  - b. Configure the ALI HiPer BAM System connection information. For details, see [“Configure the ALI HiPer BAM System Connection Information” on page 4-7.](#)
  - c. Add the HiPer folder to the Automation Server to run HiPer jobs. For details, see [“Configure the Automation Server to Run HiPer Jobs” on page 4-7.](#)
  - d. Grant data source access to HiPer users so they can upload documents. For details, see [“Grant Data Source Access to HiPer Users” on page 4-8.](#)
6. Perform the initial set up described in the *Administrator Guide for AquaLogic HiPer Workspace for Retail*.
  - a. Configure and run a Profile Web Service to import user information into the portal for use by HiPer.
  - b. Configure activity rights to give users access to HiPer features.
  - c. Create any necessary groups and set security on imported HiPer portal objects.
  - d. Create any necessary subportals to display the appropriate HiPer user interface to your users.
  - e. Create rule templates on which to base rules in HiPer.
  - f. Optionally, you can customize the HiPer user interface.

## Integrate Your Back-End Systems with the ALI HiPer BAM System

You must set up the ALI HiPer BAM System to communicate with your back-end systems (for example, an inventory database). The ALI HiPer BAM System can be integrated using several methods including TIBCO, JMS, and Web Services, but the following example describes the ALI HiPer BAM System communicating with a SQL database via a JDBC connection.

To integrate a SQL database via JDBC:

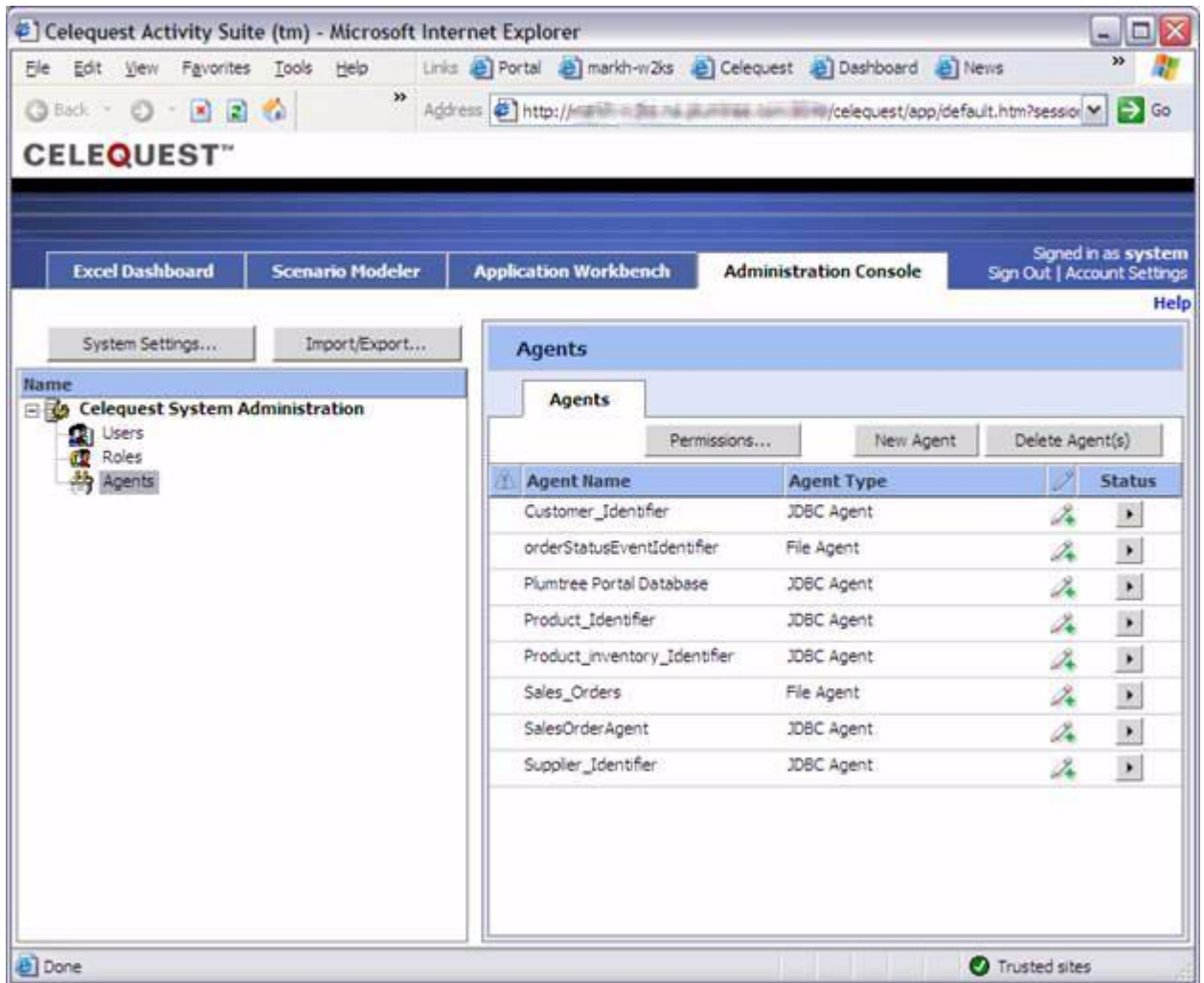
1. Create a **context-ds.xml** file in the **<BAM\_system\_home>\jboss\server\default\deploy** directory. Here is an example of the contents of that file:

```
<?xml version="1.0" encoding="UTF-8"?>
<datasources>
  <no-tx-datasource>
    <jndi-name>com.bea.context</jndi-name>
    <connection-url>jdbc:microsoft:sqlserver://hiper:1433;SelectMethod=cursor;databaseName=CFPortalDB;user=portaldbuser;password=portalpassword</connection-url>
    <driver-class>com.microsoft.jdbc.sqlserver.SQLServerDriver</driver-class>
    <!-- The login and password -->
    <user-name>portaldbuser</user-name>
    <password>portalpassword</password>
    <min-pool-size>5</min-pool-size>
    <max-pool-size>20</max-pool-size>
    <idle-timeout-minutes>5</idle-timeout-minutes>
    <track-statements>false</track-statements>
    <application-managed-security/>
  </no-tx-datasource>
</datasources>
```

2. After you create the context, restart the JBoss server. After restarting the server, the data source will appear in the ALI HiPer BAM System user interface. Next, you need to create an agent.
3. Log in to the ALI HiPer BAM System. For more information on any of the following steps, refer to Celequest documentaiton and online help.
4. Click the **Administration Console** tab.

- Under Name, click **Agents**.

Figure 4-1: Agents



- Click **New Agent**.

7. In the Edit Agent dialog box, create an agent that can talk to the back-end system.

Figure 4-2: Edit Agent Dialog Box

The screenshot shows the 'Edit Agent' dialog box within the 'Celequest Activity Suite -- Web Page Dialog'. The dialog has a title bar with a close button. The main area is titled 'Edit Agent' and includes a 'Help' button. The 'Agent Type' is set to 'JDBC'. The 'Name' field contains 'Portal Database' and the 'Status' dropdown is set to 'E'. The 'Description' field is empty. The 'Agent Details' section is expanded, showing 'No details are required'. Below this, the 'Database Type' is 'SQL Server', 'User Name' is 'portalbuser', 'Password' is masked with dots, 'Max Rows Per Query' is empty, 'Type of JDBC Connection' is 'Datasource-based', and 'JNDI Name for JDBC Source' is 'com.portal.context'. The 'JNDI Properties' section has a table with two columns: 'Name' and 'Value'. The table is currently empty. At the bottom are 'OK' and 'Cancel' buttons.

8. Click **OK** to save your agent definition.
9. Repeat Steps 1-8 to create an agent for each back-end system that you want to monitor with the ALI HiPer BAM System.

## Configure the ALI HiPer BAM System to Communicate with HiPer

When a rule is triggered within the ALI HiPer BAM System, a SOAP message is sent. You must configure a delivery profile in the ALI HiPer BAM System so that HiPer receives the message. When HiPer receives a message, it determines if there are any notifications associated with the triggered rule. If there are associated notifications, they are sent to the appropriate users.

Perform the following steps on the machine that hosts the ALI HiPer BAM System to configure the delivery profile:

1. Log in to the ALI HiPer BAM System as “system.” For more information on any of the following steps, refer to Celequest documentaiton and online help.
2. Click **Account Settings**.
3. In the Edit User dialog box, click the **Delivery Profiles** tab.
4. Click **Create Additional Profiles**.
5. Select **web service** as the profile type.
6. In the **Profile Name** box, type a name such as “<hiperserver> Web Server.”
7. In the **Web Service URL** box, type a URL of “http://<hiperserver>:<port>/hiperportlets/faces/portlets/webservice/web\_service\_endpoint.jsp.”
8. In the **Method** box, type “post.”
9. Leave the **Username** and **Password** boxes blank, but select **automatically add the profile to new alerts**.
10. Delete the existing E-mail delivery profile.

## Set Up the HiPer Database

Perform the steps in this section to set up and customize your HiPer database.

### Run the HiPer Database Scripts

In the HiPer database, import the three database scripts created in **pthiper\1.0\sql\<database>** in alphabetical order:

1. create-tables.sql
2. load-seed-info.sql
3. triggers.sql



**Note:** If you are using Oracle, run **create-tablespace.sql** before you run the other scripts. You must run this script as a user that has sysdba rights.

### Create Custom Categories for Notifications and Tips

When users create notifications and tips they can choose categories that help other users understand what the notification or tip is regarding. In the RTBUSCATEGORIES table, you must create categories that are appropriate for your company. Use [“HiPer Database Custom Categories Worksheet” on page A-5](#) to plan your categories.

### Map ALI HiPer BAM System Levels to Your Company’s Hierarchical Levels

When the ALI HiPer BAM System sends an alert to HiPer, HiPer needs to understand how the information in the alert relates to HiPer users so that it can correctly determine which users to notify. HiPer determines the appropriate users by querying users’ EOD (Extended Object Data) properties in the portal.

For example, create a notification to send to all General Managers when a region’s profit dips below 5%. If the West region profit dips, the ALI HiPer BAM System alerts HiPer of the change, including the fact that the change occurred in the West region. HiPer refers to the notification and determines that in this situation a message should be sent to all General Managers, limited by the region.

To allow HiPer to understand how the EOD properties in the portal relate to the levels in the ALI HiPer BAM System, you must modify the BAMNAME column values in the RTPROPERTYMAPPING table to match your company’s hierarchical levels (for example, Level 2=Region). Use [“HiPer Database Hierarchical Levels Worksheet” on page A-6](#) to plan your levels.

## Migrate HiPer Information Into Content Server

Perform the following step to configure HiPer in Content Server:

1. Copy the .ZIP file from the computer that hosts HiPer, in **pthiper\1.0\serverpackages**, to the computer that hosts Content Server, in **ptcs\6.1\settings\migration**.

## Configure HiPer on the Portal Server

Perform the following steps in the administrative area of the portal.

### Import HiPer Portal Objects

During the Portal Server install an import package (**hiper\_package.ptc**) was created in **pthiper\1.0\serverpackages**. You must import the package to create the portal objects needed by HiPer.

1. In the portal, click **Administration**.
2. In the Select Utility menu, click **Portal Resources - Import**.
3. Under Folder Information, click **Browse** to select an administrative folder in which you want to create the HiPer portal objects.
4. Under General Info, click **Browse** to select the **hiper\_package.ptc** file, then click **Upload**.
5. Click **Finish**.

### Configure the ALI HiPer BAM System Connection Information

Use the HiPer configuration utility in the portal to set up the ALI HiPer BAM System (Celequest) information:

1. In the portal, click **Administration**.
2. In the Select Utility menu, click **HiPer Configuration Settings**.
3. Under Celequest Administrative Preferences:
  - a. In the **Celequest Server** box, type the URL for your ALI HiPer BAM System (for example, `http://<bamserver>:<port>/bam`).
  - b. In the **User Name** box, type the name of the user who will control the ALI HiPer BAM System (for example, `system`).
  - c. In the **Password** and **Confirm Password** boxes, type the password for the ALI HiPer BAM System user (for example, `manager`).
4. When you are done, click **OK**.

### Configure the Automation Server to Run HiPer Jobs

Add the HiPer folder to the Automation Server, so that HiPer jobs will run:

1. In the portal, click **Administration**.
2. In the Select Utility menu, click **Automation Server**.
3. Add the HiPer folder to an existing Automation Server or create a new one (refer to Portal online help for details) and register the following folder: **Admin Objects Directory : Application Spaces : HiPer**.

## Grant Data Source Access to HiPer Users

Grant read access to data sources for HiPer users so they can submit documents to HiPer:

1. In the portal, click **Administration**.
2. Navigate to and open a data source to which you want to grant access (for example, **Administrative Resources : World Wide Web**).
3. On the **Security** page, add the All HiPer Users group (found in **Application Spaces : HiPer : Users and Groups**) to the Security Settings list and change the Privilege to **Read** or higher.
4. When you are done, click **Finish**.



**Note:** If you create new data sources, remember to grant access to HiPer groups when appropriate.

You have completed the install, but you must now perform the initial set up described in the *Administrator Guide for AquaLogic HiPer Workspace for Retail* before your users can start using HiPer.



# A Configuration Worksheets

This appendix contains worksheets for entering the installation information required by portal components. Print these worksheets and use them to gather the host computer and component configuration information you need to install portal components.

This appendix includes the following worksheets:

- ["HiPer Server Install Worksheet" on page A-2](#)
- ["Portal Server Install Worksheet" on page A-3](#)
- ["Image Server Install Worksheet" on page A-3](#)
- ["Automation Server Install Worksheet" on page A-4](#)
- ["ALI HiPer BAM System Install Worksheet" on page A-4](#)
- ["HiPer Database Custom Categories Worksheet" on page A-5](#)
- ["HiPer Database Hierarchical Levels Worksheet" on page A-6](#)

## HiPer Server Install Worksheet

The following worksheet lists the values you enter when you run the HiPer Server install.

*Table A-1: HiPer Server Install Worksheet*

Property	Example Value	Your Value
Installation Folder	C:\Program Files\plumtree	
HiPer Port	http://hiperportal:8081	
HiPer Database Connection Information		
Host Computer	hiper.portal.com	
Port	1433	
Name	hiperdb	
Login	hiperdbuser	
Password		
Portal Database Connection Information		
Host Computer	database.portal.com	
Port	1433	
Name	portaldb	
Login	portaldbuser	
Password		

## Portal Server Install Worksheet

The following worksheet lists the values you enter when you run the Portal Server install.

*Table A-2: Portal Server Install Worksheet*

<b>Property</b>	<b>Example Value</b>	<b>Your Value</b>
Portal Server Folder	C:\Program Files\plumtree\ptportal\5.0	

## Image Server Install Worksheet

The following worksheet lists the values you enter when you run the Image Server install.

*Table A-3: Image Server Install Worksheet*

<b>Property</b>	<b>Example Value</b>	<b>Your Value</b>
Image Server Folder	C:\Program Files\plumtree\ptimages	

## Automation Server Install Worksheet

The following worksheet lists the values you enter when you run the Automation Server install.

*Table A-4: Automation Server Install Worksheet*

Property	Example Value	Your Value
Automation Server Folder	C:\Program Files\plumtree\ptportal\5.0	
HiPer Database Connection Information		
Host Computer	hiper.portal.com	
Port	1433	
Name	hiperdb	
Login	hiperdbuser	
Password		
Portal Database Connection Information		
Host Computer	database.portal.com	
Port	1433	
Name	portaldb	
Login	portaldbuser	
Password		

## ALI HiPer BAM System Install Worksheet

The following worksheet lists the values you enter when editing the ALI HiPer BAM System metadata files.

*Table A-5: ALI HiPer BAM System Install Worksheet*

Property	Example Value	Your Value
Database Machine Name	bam.portal.com	
User Name	bamuser	
Password		

# HiPer Database Custom Categories Worksheet

Use the following worksheet to list the custom categories you will create in the database for notifications and tips.

Table A-6: HiPer Database Custom Categories Worksheet

[illegible]

## HiPer Database Hierarchical Levels Worksheet

Use the following worksheet to map the levels in the ALI HiPer BAM System to your company's hierarchical structure (for example, Level 1=Region, Level 2=District). You will change the values in the RTPROPERTYMAPPING table to match this worksheet.

*Table A-7: HiPer Database Hierarchical Levels Worksheet*

<b>Hierarchical Levels</b>	<b>Your Company Level</b>
Level 1	
Level 2	
Level 3	
Level 4	
Level 5	
Level 6	
Level 7	
Level 8	

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