



Agile Product Lifecycle Management

Customer Needs Management Implementation Guide

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Preface

Oracle's Agile PLM documentation set includes Adobe® Acrobat PDF files. The [Oracle Technology Network \(OTN\) Web site](http://www.oracle.com/technetwork/documentation/agile-085940.html) <http://www.oracle.com/technetwork/documentation/agile-085940.html> contains the latest versions of the Agile PLM PDF files. You can view or download these manuals from the Web site, or you can ask your Agile administrator if there is an Agile PLM Documentation folder available on your network from which you can access the Agile PLM documentation (PDF) files.

Note To read the PDF files, you must use the free Adobe Acrobat Reader version 9.0 or later. This program can be downloaded from the [Adobe Web site](http://www.adobe.com) <http://www.adobe.com>.

The [Oracle Technology Network \(OTN\) Web site](http://www.oracle.com/technetwork/documentation/agile-085940.html) <http://www.oracle.com/technetwork/documentation/agile-085940.html> can be accessed through **Help > Manuals** in both Agile Web Client and Agile Java Client. If you need additional assistance or information, please contact My Oracle Support (<https://support.oracle.com>) for assistance.

Note Before calling Oracle Support about a problem with an Agile PLM manual, please have the full part number, which is located on the title page.

TTY Access to Oracle Support Services

Oracle provides dedicated Text Telephone (TTY) access to Oracle Support Services within the United States of America 24 hours a day, 7 days a week. For TTY support, call 800.446.2398. Outside the United States, call +1.407.458.2479.

Readme

Any last-minute information about Agile PLM can be found in the Readme file on the [Oracle Technology Network \(OTN\) Web site](http://www.oracle.com/technetwork/documentation/agile-085940.html) <http://www.oracle.com/technetwork/documentation/agile-085940.html>.

Agile Training Aids

Go to the [Oracle University Web page](http://www.oracle.com/education/chooser/selectcountry_new.html) http://www.oracle.com/education/chooser/selectcountry_new.html for more information on Agile Training offerings.

Accessibility of Code Examples in Documentation

Screen readers may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, some screen readers may not always read a line of text that consists solely of a bracket or brace.

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Introduction to Agile CNM

This chapter includes the following:

- Overview 1
- Installation and Test Notice 1

Overview

Agile Customer Needs Management (CNM) is a product that helps you transform market requirements into products. Requirements can come in from various sources such as CRM, Quality or other enterprise applications or detailed documents received from customers. CNM offers a platform on which Product and Project owners can capture, filter, refine, collaborate on, prioritize and eventually incorporate those requirements into products.

Installation and Test Notice

Install and test this release on a designated development server before installing it on your production environment. Your development environment should mirror your production environment as closely as possible to provide accurate testing results. It is important to validate the installation of this release, and confirm your integrations are working correctly as part of your minimum due diligence. Any problems or questions noted during your development system testing should be resolved before installing this release on your production environment.

Installing and Configuring

This chapter includes the following:

▪ Prerequisites	3
▪ Obtaining Software	5
▪ Software Requirements and Specifications	5

Prerequisites

Before installing Agile CNM, the following products must be installed and running:

1. Oracle Database
2. Oracle WebLogic Server
3. Oracle Agile PLM with File Manager and AutoVue
or
4. Oracle Universal Content Management Server and
Oracle AutoVue with Oracle AutoVue VueLink
5. Any of the following LDAP Servers:
 - Sun Java System Directory Server
 - Microsoft Active Directory Server
 - Oracle Internet Directory Server

Oracle Database

An Oracle 10g or 11g database must be installed and running in order to install the Agile CNM database. It is recommended that the Agile CNM database be installed on a separate machine from the Agile CNM installation. For more information on installing the Oracle database, see the [Oracle Database documentation](http://www.oracle.com/technology/documentation/database.html) <http://www.oracle.com/technology/documentation/database.html>.

Oracle WebLogic Server

Oracle WebLogic Server is a scalable, enterprise-ready Java Platform, Enterprise Edition application server and a part of the Oracle Fusion Middleware portfolio. Agile CNM supports Oracle WebLogic Server 11g (10.3.5). For information on installing Oracle WebLogic Server, see the [Oracle WebLogic documentation](http://www.oracle.com/technology/documentation/middleware.html) <http://www.oracle.com/technology/documentation/middleware.html>.

Oracle Agile PLM

With Agile CNM, you can manage file attachments using the Agile PLM file manager. If the Agile

PLM system has AutoVue installed, you can view file attachments with Agile PLM. You can also authenticate users through your Agile PLM system. All of these benefits allow you to consolidate storage locations which reduce total cost of ownership.

Oracle Universal Content Management Server

The Oracle Universal Content Management Server (or Content Server) is the foundation for a variety of Oracle content management products. It provides a flexible, secure, centralized, web-based repository that manages all phases of the content life cycle: from creation and approval to publishing, searching, expiration, and archival or disposition.

All content, regardless of content type, is stored in the web repository or database for management, reuse and access.

In Agile CNM, the Content Server can store all of the application content, ranging from e-mail, discussions, documents, reports, spreadsheets and records, in its repository.

When installing the Content Server for Agile CNM, make sure you enable full text search.

If you are using the Content Server as a file server, Agile CNM users can be authenticated only through an LDAP server.

For improved security, you should deploy the Content Server and AutoVue VueLink with SSL connections.

For information on installing the Content Server, see the [Oracle Enterprise Content Management documentation](http://www.oracle.com/technology/documentation/oecm.html) <http://www.oracle.com/technology/documentation/oecm.html>.

Creating Content Type for Agile CNM

After Oracle UCM is installed, you must create the AGILECNM content type which filters out all non-CNM related attachments during a full text search.

To create the Agile CNM content type:

1. Log in to Oracle UCM.
2. Click **Administration**.
3. Click **Admin Applets**.
4. Click the Configuration Manager icon.
5. Click **Options>Content Types**.
6. Add the following information in the respective fields:
 - Name : AGILECNM
 - Description: Agile CNM File
 - Image: document.gif

Oracle AutoVue and Autovue VueLink for UCM

Oracle AutoVue is a viewing and markup application that is capable of displaying hundreds of file formats without the authoring application.

Oracle AutoVue VueLink for Oracle UCM allows AutoVue to communicate with UCM using standard HTTP protocol. Before integrating AutoVue with Oracle UCM, make sure that UCM, AutoVue, and Oracle WebLogic Server are properly installed and configured.

For information on installing AutoVue and AutoVue VueLink for Oracle UCM, see the [Oracle AutoVue documentation](http://www.oracle.com/technology/documentation/autovue.html) <http://www.oracle.com/technology/documentation/autovue.html>.

For information on verifying CNM and AutoVue Configuration using AutoVue VueLink, see [Verifying CNM and AutoVue Configuration](#) on page 22.

Obtaining Software

Oracle products are distributed as "Product Packs". A Product Pack is an electronic version of the software. Refer to the Media Pack description or the list of products that you purchased on your Oracle ordering document. Then, view the Quick Install Guide License List to help you decide which Product Pack you need. Prior to downloading, verify that the product you are looking for is in the License and Options section of the Product Pack Readme. Oracle recommends that you print the Readme for reference.

Please download each Product Pack from the Oracle Software Delivery Cloud web site (<http://edelivery.oracle.com>) as specified below:

1. Oracle Agile Applications (Agile Customer Needs Management Release 1.2 Media Pack)
2. Oracle Fusion Middleware (Oracle Fusion Middleware 11g Release Media Pack contains Oracle WebLogic Server 10.3.5. Oracle Enterprise Content Management 10g Release 3 Media Pack contains Oracle Content Server 10g R3.)
3. Oracle Database
4. Oracle AutoVue (Oracle AutoVue Integrations 20.0 Media Pack, which contains Oracle AutoVue VueLink 20.0 for Universal Content Management)

There will be an itemized part list within each of the packs and you will need to download all items in order to have the complete download for the desired Oracle Agile release.

All Oracle Software Delivery Cloud files have been archived using Info-ZIP's highly portable Zip utility. After downloading one or more of the archives, you will need the UnZip utility or the Winzip utility to extract the files. You must unzip the archive on the platform for which it was intended. Verify that the file size of your downloaded file matches the file size displayed on Oracle Software Delivery Cloud. Unzip each Zip file to its own temporary directory.

Software Requirements and Specifications

Agile Customer Needs Management can be installed on the following operating systems:

- Microsoft Windows Server 2008 R1, R2
- Solaris 10 (SPARC) (64-bit with 32-bit JVM and 64-bit JVM)
- Oracle Enterprise Linux 5 (32-bit with 32-bit JVM, 64-bit with 32-bit JVM and 64-bit JVM)
- Red Hat Enterprise Linux 5 ((32-bit with 32-bit JVM, 64-bit with 32-bit JVM and 64-bit JVM)

The following products are required to install and run Agile CNM:

Database Server	Oracle 10g R2 Oracle 11g R1 or R2
Application Server	Oracle WebLogic Server 11gR1 (10.3.5)
Web Browser	Microsoft Internet Explorer 7, 8, 9 Firefox 3, 4, 5, 6, 7 Safari 4, 5
Web Client OS	Microsoft Windows 7, Vista, XP SP3 Mac OS X 10.x
PLM Server	Agile Product Lifecycle Management 9.2.2.4 and later, up to 9.3.1
View Server (Optional)	Oracle AutoVue 20.1
LDAP Server (Optional)	Microsoft Active Directory Sun ONE Directory Server Oracle Internet Directory
Content Management (Optional, if authenticating with Agile PLM)	Oracle Universal Content Management Server Standard Edition 10g R3

Getting Started

This chapter includes the following:

▪ Copying the Agile CNM Files.....	7
▪ Installing the Agile CNM Database Schema.....	8
▪ Starting the Agile CNM Installer.....	8
▪ Installing Agile CNM	9
▪ Configuring the User Productivity Kit	19

This section provides information on the following:

- Copying install files
- Installing database schema
- Starting the installer
- Installing the application in both standalone and cluster environment
- Configuring the User Productivity Kit

Some of the installation panels have online help. At any time during installation, you can click **Help** for more information about the panel's options.

Note If you leave the online help window open, it will be updated when you proceed through the installer panels. Otherwise, click **Close** at the bottom of the help window.

Copying the Agile CNM Files

Before installing Agile CNM, the contents of the media pack should be copied to a local directory on the machine where Agile CNM is to be installed.

The CNM database installation files should be copied to a local directory on the machine where the Oracle database is installed and running.

Installing the Agile CNM Database Schema

Important A database instance for Agile CNM must be installed and configured before installing the database schema. You can use the Oracle Database Configuration Assistant to configure the instance.

To install the Agile CNM database schema:

1. Make sure you have copied the correct database installation zip file to the machine where the Oracle database is installed and running.

Windows: `agilecnm11db_Windows.zip`

UNIX: `agilecnm11db_Unix.zip`

2. Make sure the `ORACLE_HOME` environment variable is set.
3. Unzip the database installation zip file to a local directory.
4. From the local directory, open and edit the `CNMDBVAR.TXT` file to change all of the parameters to values specific to your system.

Note For security purpose, do not provide your password in the `CNMDBVAR.TXT` file.

5. Save the `CNMDBVAR.TXT` file.
6. Run the `cnmdatabase.bat` or `cnmdatabase.sh` file to create the database scripts.
7. Change to the displayed directory.
8. Open and edit the `cnmrecreateschema.bat` or `cnmrecreateschema.sh` file to change the Agile CNM user password and the system password.
9. Save the `cnmrecreateschema.bat` or `cnmrecreateschema.sh` file with a different file name and run the script.
10. Delete the new file that you have created.

Note If you are upgrading from Agile CNM 1.1 to Agile CNM 1.2, you need to run the upgrade script `cnm11to12.sql` located in the `DB_upgrade` folder in the media pack.

Starting the Agile CNM Installer

To start the Agile CNM installer on Windows:

1. Log in to the computer using a login with local administrator permissions.
2. In the directory where you downloaded the Agile CNM files, double-click the `cnmsetup_win.exe` file.

After a few moments, the Welcome screen appears.

For information about any screen in the installer, click **Help**.

To start the Agile CNM installer on UNIX:

1. Log into the system.
2. Open a terminal window.
3. Go to the directory where you copied the Agile CNM files. Locate the `cnmsetup_<OS>.bin` file, and run the program by typing the following:

Linux: `./cnmsetup_lin.bin`

Solaris(SPARC): `./cnmsetup_sol.bin`

After a few moments, the Welcome screen appears.

For information about any screen in the installer, click **Help**.

Installing Agile CNM

Agile CNM takes advantage of clustering capability provided by the supported application servers. A cluster is a group of servers that work together to provide a more scalable, more reliable application platform than a single server. A cluster appears to its clients as a single server, but is actually a group of servers acting as one. A cluster provides two key advantages over a single server:

- **Scalability:** The capacity of a cluster is not limited to a single server or a single machine. New servers can be added to the cluster dynamically to increase capacity. If more hardware is needed, a new server on a new machine can be added. If a single server cannot fully utilize an existing machine, additional servers can be added to that machine.
- **Redundancy:** A cluster uses the redundancy of multiple servers to insulate clients from failures. The same service can be provided on multiple servers in the cluster. If one server fails, the surviving members can continue to serve the application. The ability to fail over from a failed server to a functioning server can increase the availability of the application to clients.

Agile CNM can run on a standalone server or in a cluster environment. When installed in a cluster setup, the administration server and managed servers can be installed on single or multiple machines.

The cluster setup includes configuring the number of managed servers in a cluster, adding them to the cluster, and targeting a JMS server used for notification to one of the newly created managed servers.

Standalone Installation

Perform the following steps to install the application in a standalone environment:

Step #	Screen Name	Related Tasks
1	Welcome to Agile CNM Installation	Click Next to begin the installation process.
2	Customer Information	Enter a user name and the name of your company. Click Next to continue.

Step #	Screen Name	Related Tasks
3	Installation Location	<p>Enter the directory where you want Agile CNM to be installed. This location will be known as the AGILECNM_HOME throughout this document.</p> <p>Click Next to continue.</p>
4	Oracle Middleware Home Directory	<p>Enter the directory where Oracle WebLogic Server is currently installed. This location is known as the Oracle Middleware Home Directory.</p> <p>Click Next to continue.</p>
5	Oracle WebLogic Server Product Directory	<p>Enter the directory where the Oracle WebLogic Server product files are currently installed. This location is known as the Oracle WebLogic Server Product Directory. Click Next to continue.</p>
6	Installation Type	<p>Choose standalone installation.</p> <p>Click Next to continue.</p>
7	Oracle WebLogic Server Listen Ports	<p>Enter the numbers for the Oracle WebLogic Server Listen port, SSL Listen port, and JMX Listen port. The default numbers are 7001, 7002, and 9899 respectively.</p> <p>Note For improved security, you should deploy Oracle WebLogic Server on SSL ports.</p> <p>Click Next to continue.</p>
8	Java Home	<p>Enter the location of JDK version 6 you will use with Agile CNM. The installation fails if an incompatible version of JDK is entered.</p> <p>Select the <i>Check if JDK is 64-bit</i> option to increase the Java heap size range from 1536 MB to 3072 MB.</p> <p>Note Download 64 bit JDK as this is not bundled with the Agile CNM 1.2 media pack.</p> <p>Click Next to continue.</p>
9	Java Heap Configuration	<p>Enter a value for the Java heap size. The Java heap size allocates an amount of memory to a Java application. The recommended range for Agile CNM is between 640 MB and 1536 MB on Windows, and 640 MB and 2048 MB on UNIX.</p> <p>Note The maximum heap size for 64bit JDK is 3072 MB.</p> <p>Click Next to continue.</p>
10	Windows Service (Windows only)	<p>Choose if you would like to run Agile CNM as a Windows service.</p> <p>Click Next to continue.</p>

Step #	Screen Name	Related Tasks
11	Agile CNM Application Server Information	<p>Enter the fully qualified hostname or alias and listen port of the machine where Agile CNM is to be installed.</p> <p>Click Next to continue.</p> <p>Note If you are using a proxy/load balancer, the listen port for the CNM Application Server is not the same as the listen port used to configure WebLogic Server.</p>
12	Agile CNM Database Details	<p>Enter the hostname, listen port, service/SID, user, and password needed to connect to the Agile CNM database.</p> <p>Click Next to continue.</p>
13	SMTP Server Information	<p>Enter the SMTP server hostname, and listen port that Agile CNM will use to send attachments.</p> <p>Click Next to continue.</p>
14	File Manager Type	<p>Choose whether you want to manage files through the Agile PLM File Manager or Universal Content Management (UCM).</p> <p>Note File Manager Type cannot be changed after installation. If the file manager type is changed, all attachments from the first file manager server are lost.</p> <p>Click Next to continue.</p>
	If you chose Agile PLM File Manager:	
	Oracle Agile PLM Application URL	<p>Enter the URL of the Agile PLM application where you want to authenticate Agile CNM users in the following format:</p> <p>http://PLM_proxy_server/virtual_path</p> <p>If your Agile PLM server authenticates using Windows credentials, then use the application server and port number instead of the proxy in the URL:</p> <p>http://PLM_server:port/virtual_path</p> <p>Click Next to continue.</p> <p>Go to Step 15.</p>
	If you chose UCM:	
	Universal Content Management (UCM) Information	<p>Enter the fully qualified hostname, listen port, and virtual path of the UCM server.</p> <p>Click Next to continue.</p>
	UCM Web Server Information	<p>Enter the fully qualified hostname, listen port, and virtual path of the UCM web server. If you are accessing UCM through a load balancer, enter the load balancer information instead of</p>

Step #	Screen Name	Related Tasks
		the UCM web server details. Click Next to continue.
	UCM Login Information	Enter the UCM Administrator username and password. Click Next to continue.
	Directory Server	Choose either the Sun Java System Directory Server, Microsoft Active Directory Server or Oracle Internet Directory Server. Click Next to continue.
	Directory Server Details	Enter the fully qualified hostname and listen port of the directory server. Click Next to continue.
	Distinguished Name (DN) Information	Enter the User Base and Group Base distinguished name for your directory server. The Distinguished Name is the directory entry that represents the first entry in a directory tree. Click Next to continue.
	Directory Server Information	Enter the Directory Server user ID and password. Click Next to continue.
	Oracle AutoVue Server Information	Check the Configure AutoVue option if you want the Viewer to view the attachments. Enter the fully qualified hostname and listen port of the Oracle AutoVue Server. Note Make sure the UCM AutoVue and CNM servers' hostnames are configured in a shared common network domain, for example, autovue.oracle.com and cnmsvr.oracle.com Click Next to continue. <i>Go to Step 15.</i>
15	Choose Shortcut Folder (Windows only)	Choose where you would like to create links or product icons for Agile CNM. Click Next to continue.
16	Pre-Installation Summary	Review the installation information. If changes are needed, click Previous to return to the installer screens. Click Install to install Agile CNM. After installation, click Done to restart the computer.

Cluster Installation

Install the Agile Application Server on each server by starting the Agile CNM installer. The directory structure should be the same on all the servers in the cluster. For more information on starting the Agile CNM Installer, see [Starting the Agile CNM Installer](#) on page 8.

Perform the following steps to install the application in a cluster environment:

Step #	Screen name	Related Tasks
1	Welcome to Agile CNM Installation	Click Next to begin the installation process.
2	Customer Information	Enter a user name and the name of your company. Click Next to continue.
3	Installation Location	Enter the directory where you want Agile CNM to be installed. This location will be known as the AGILECNM_HOME throughout this document. Click Next to continue.
4	Oracle Middleware Home Directory	Enter the directory where Oracle WebLogic Server is currently installed. This location is known as the Oracle Middleware Home Directory. Click Next to continue.
5	Oracle WebLogic Server Product Directory	Enter the directory where the Oracle WebLogic Server product files are currently installed. This location is known as the Oracle WebLogic Server Product Directory. Click Next to continue.
6	Installation Type	Choose cluster installation. Click Next to continue.
7	Server Type	Choose the type of server to be either Administration server or managed server. Choose the number of Managed servers. The maximum number of managed servers you can configure is 2. Based on the type of server you choose, the installer displays additional screens to capture relevant data. If you chose <i>Administration server</i> , follow the steps listed under Admin Server Installation. If you chose <i>Managed server</i> , follow the steps listed under Managed Server Installation Click Next to continue.

Installing Administration Server

To install an Admin Server, complete *steps 1 through 7* under Cluster Installation, and then perform the following steps:

Step #	Screen name	Related Tasks
8	Oracle Weblogic Server Ports - Admin Server	<p>Enter the numbers for the Oracle WebLogic Server Listen port, SSL Listen port, and JMX Listen port. The default numbers are 9001, 9002, and 9899 respectively.</p> <p>Note For improved security, you should deploy Oracle WebLogic Server on SSL ports.</p> <p>Click Next to continue.</p>
9	Java Home	<p>Enter the location of JDK version 6 you will use with Agile CNM. The installation fails if an incompatible version of JDK is entered.</p> <p>Select the <i>Check if JDK is 64-bit</i> option to increase the the Java heap size range from 1536 MB to 3072 MB.</p> <p>Note Download 64 bit JDK as this is not bundled with the Agile CNM 1.2 media pack.</p> <p>Click Next to continue.</p>
10	Java Heap Configuration	<p>Enter a value for the Java heap size. The Java heap size allocates an amount of memory to a Java application. The recommended range is between 1536 MB and 2048 MB on Windows.</p> <p>Click Next to continue.</p>
11	Windows Service (Windows only)	<p>Choose if you would like to run Agile CNM as a Windows service.</p> <p>Click Next to continue.</p>
12	Agile CNM Application Server Information	<p>Enter the fully qualified hostname or alias and listen port of the machine where Agile CNM is to be installed.</p> <p>Click Next to continue.</p> <p>Note If you are using a proxy/load balancer, the listen port for the CNM Application Server is not the same as the listen port used to configure WebLogic Server.</p>
13	Agile CNM Database Details	<p>Enter the hostname, listen port, service/SID, user, and password needed to connect to the Agile CNM database.</p> <p>Click Next to continue.</p>
14	SMTP Server Information	<p>Enter the SMTP server hostname, and listen port that Agile CNM will use to send attachments.</p> <p>Click Next to continue.</p>

Step #	Screen name	Related Tasks
15	File Manager Type	Choose whether you want to manage files through the Agile PLM File Manager or Universal Content Management (UCM). Note File Manager Type cannot be changed after installation. If the file manager type is changed, all attachments from the first file manager server are lost.
	If you chose Agile PLM File Manager:	
	Oracle Agile PLM Application URL	Enter the URL of the Agile PLM application where you want to authenticate Agile CNM users in the following format: http://PLM_proxy_server/virtual_path If your Agile PLM server authenticates using Windows credentials, then use the application server and port number instead of the proxy in the URL: http://PLM_server:port/virtual_path Click Next to continue. Go to Step 16.
	If you chose UCM:	
	Universal Content Management (UCM) Information	Enter the fully qualified hostname, listen port, and virtual path of the UCM server. Click Next to continue.
	UCM Web Server Information	Enter the fully qualified hostname, listen port, and virtual path of the UCM web server. If you are accessing UCM through a load balancer, enter the load balancer information instead of the UCM web server details. Click Next to continue.
	UCM Login Information	Enter the UCM Administrator username and password. Click Next to continue.
	Directory Server	Choose either the Sun Java System Directory, Microsoft Active Directory Server or Oracle Internet Directory Server. Click Next to continue.
	Directory Server Details	Enter the fully qualified hostname and listen port of the directory server. Click Next to continue.
	Distinguished Name (DN) Information	Enter the User Base and Group Base distinguished name for your directory server. The Distinguished Name is the directory entry that represents the first entry in a directory tree. Click Next to continue.

Step #	Screen name	Related Tasks
	Directory Server Information	Enter the Directory Server user ID and password. Click Next to continue.
	Oracle AutoVue Server Information	Check the Configure AutoVue option if you want the Viewer to view the attachments. Enter the fully qualified hostname and listen port of the Oracle AutoVue Server. Note Make sure the UCM AutoVue and CNM servers' hostnames are configured in a shared common network domain, for example, autovue.oracle.com and cnmsvr.oracle.com Click Next to continue. <i>Go to Step 16.</i>
16	Choose Shortcut Folder (Windows only)	Choose where you would like to create links or product icons for Agile CNM. Click Next to continue.
17	Pre-Installation Summary	Review the installation information. If changes are needed, click Previous to return to the installer screens. Click Install to install Agile CNM. After installation, click Done to restart the computer.

Installing Managed Server

To install a Managed Server, complete *steps 1 through 7* under Cluster Installation, and then perform the following steps:

Step #	Screen name	Related Tasks
8	If you chose the number of Managed Servers to be 1:	
	Oracle Weblogic Server Ports - Managed Server1	Enter the numbers for the Oracle WebLogic Server Listen port, SSL Listen port, JMX Listen port, and Managed server name. The default numbers are 7001, 7002, and 9896 respectively. Click Next to continue.
	If you chose the number of Managed Servers to be 2:	
	Oracle Weblogic Server Ports - Managed Server2	Enter the numbers for the Oracle WebLogic Server Listen port, SSL Listen port, JMX Listen port, and Managed server name. The default numbers are 8001, 8002, and 9897 respectively. Click Next to continue.

Step #	Screen name	Related Tasks
	<p>If you chose to install both Admin and Managed Servers, the following screens are displayed:</p> <ul style="list-style-type: none"> Oracle Weblogic Server Ports - Admin Server Oracle Weblogic Server Ports - Managed Server1 Oracle Weblogic Server Ports - Managed Server2 <p>Enter the details as described above.</p>	
9	Administration Server Details	<p>Enter the Administration server host name, and Listen port. The default number for the Listen port is 9001.</p> <p>Click Next to continue.</p>
10	Java Home	<p>Enter the location of JDK version 6 you will use with Agile CNM. The installation fails if an incompatible version of JDK is entered.</p> <p>Select the <i>Check if JDK is 64-bit</i> option to increase the Java heap size range from 1536 MB to 3072 MB.</p> <p>Note Download 64 bit JDK as this is not bundled with the Agile CNM 1.2 media pack.</p> <p>Click Next to continue.</p>
11	Java Heap Configuration	<p>Enter a value for the Java heap size. The Java heap size allocates an amount of memory to a Java application. The recommended range is between 1536 MB and 2048 MB on Windows.</p>
12	Windows Service (Windows only)	<p>Choose if you would like to run Agile CNM as a Windows service.</p> <p>Click Next to continue.</p>
13	Choose Shortcut Folder (Windows only)	<p>Choose where you would like to create links or product icons for Agile CNM.</p> <p>Click Next to continue.</p>
14	Pre-Installation Summary	<p>Review the installation information. If changes are needed, click Previous to return to the installer screens.</p> <p>Click Install to install Agile CNM.</p> <p>After installation, click Done to restart the computer.</p>

Starting the Administration Server

To start the Administration Server, go to <AGILECNM_HOME>/cnmdomain folder on the machine where the Administration Server is installed and run the **startWeblogic.cmd** for Windows or **startWeblogic.sh** for Solaris/Linux.

Adding Managed Servers to the Cluster

To add managed servers to the cluster:

1. Open the Administration console with the following URL in your web browser:
http://<AdminServerName>:<WLS_port_number>/console
The default user login is **weblogic**, and the password is **weblogic1**.
2. Click the **Lock and Edit** button.
3. Go to **Domain Configurations > Environment > Servers**.
4. On the Summary of Servers page, click **New** to add a managed server.
5. Enter the name, listen address, and server listen port of the managed server in the appropriate box.

Note A fully qualified domain name should be given to the managed server and the port number should be the same as specified during installation.

6. Select **CNMCluster** and then select **Yes, create a cluster for this server**.
7. Click **Finish**.
8. Repeat the above steps to add all managed servers to the cluster.

Starting the Managed Servers

To start the Managed Server:

1. Go to `<AGILECNM_HOME>/cnmdomain` on each machine where a managed server is installed and run the **startManagedServer(n)** script. Here *n* can be 1 or 2.

Note If you have installed multiple managed servers on one machine, the file names of the managed server scripts will be in the format **startServerManaged(n).sh** for Solaris and **startManagedServer(n).cmd** for Windows.

2. Copy the logging.xml file from
`<AGILECNM_HOME>\cnmdomain\config\fmwconfig\servers\AdminServer` to
`<AGILECNM_HOME>\cnmdomain\config\fmwconfig\servers\<Name Configured for Managed server>`.
3. Repeat *Step 2* for all Managed servers.

Creating a JMS Server

To create a JMS server:

1. Open the Administration console with the following URL in your web browser:
http://<AdminServerName>:<WLS_port_number>/console
The default user login is **weblogic**, and the password is **weblogic1**.
2. Click the **Lock and Edit** button.
3. Go to **Domain Configurations > Services > Messaging > JMS Servers** and click **New**.

4. On the **Summary of JMS Servers** page, click **New** create a JMS server.
5. Enter a name different from the name given to the managed server and click **Next**.
6. Select the target managed server on which you would like to deploy the JMS server and click **Finish**.

Note You need to create as many JMS servers as managed servers. Each managed server must have a separate JMS server and the name of the JMS server cannot be the same as the name provided for the managed server.

7. Click the **Activate Changes** button.

Setting up SSL in WebLogic Server

To activate SSL:

1. Open the Administration console with the following URL in your web browser:
http://<AdminServerName>:<WLS_port_number>/console
The default user login is **weblogic**, and the password is **weblogic1**.
2. Click the **Lock and Edit** button.
3. Go to **Domain Configurations > Environment > Servers** and click on the name of the server for which you want to activate SSL Port.
4. Click on the **General** tab and select **SSL Listen Port Enabled**.
5. Click **Advanced > OK** and select **WebLogic Plug-In Enabled**.
6. Click **Save** to save all changes.
7. Click the **Activate Changes** button to enable the settings.
8. Restart both Application server and Web server

Note The steps provided above use digital certificates, private keys, and the trusted CA certification for demonstration only. For production environment, refer WebLogic documentation.

Configuring the User Productivity Kit

If you purchased the Agile CNM User Productivity Kit (UPK), the online help system for Agile CNM, follow the instructions in the UPK documentation for configuration after Agile CNM is installed.

Post-Install Tasks

This chapter includes the following:

- Verifying Agile CNM Installation Directory Structure 21
- Verifying CNM and AutoVue Configuration using AutoVue VueLink 22

This section describes the post-installation tasks and recommendations.

After you install the Agile CNM application, you are required to do the following:

1. Copy the file **logging.xml** from
`<AGILECNM_HOME>\cnmdomain\config\fmwconfig\servers\adminserver` and
 replace the existing **logging.xml** file in the location
`<AGILECNM_HOME>\cnmdomain\config\fmwconfig\servers\managedserver`.
2. Restart the managed servers.
3. Repeat *step 1* for all the managed servers.

Note You must stop the WebLogic managed server before stopping the administration server. Make sure you stop and restart the managed server before and after copying **logging.xml** from the administration server folder to managed server folder. It is highly recommended that you run the script **stopWeblogic.cmd** for Windows and **stop Weblogic.sh** for Solaris to stop the servers.

Verifying Agile CNM Installation Directory Structure

After you install Agile CNM, the following subdirectories appear in the AGILECNM_HOME directory:

Subdirectory	Description
application	OracleCNM .ear file
cnmdomain	Server startup and stop scripts
config	Configuration scripts
fusionlib	Oracle .jar files
install	Installation scripts
lib	Location of files to integrate to 9.3.x and 9.2.2.x
tools	Location of change-wls-admin script
Uninstaller	Agile CNM Uninstaller

Verifying CNM and AutoVue Configuration using AutoVue VueLink

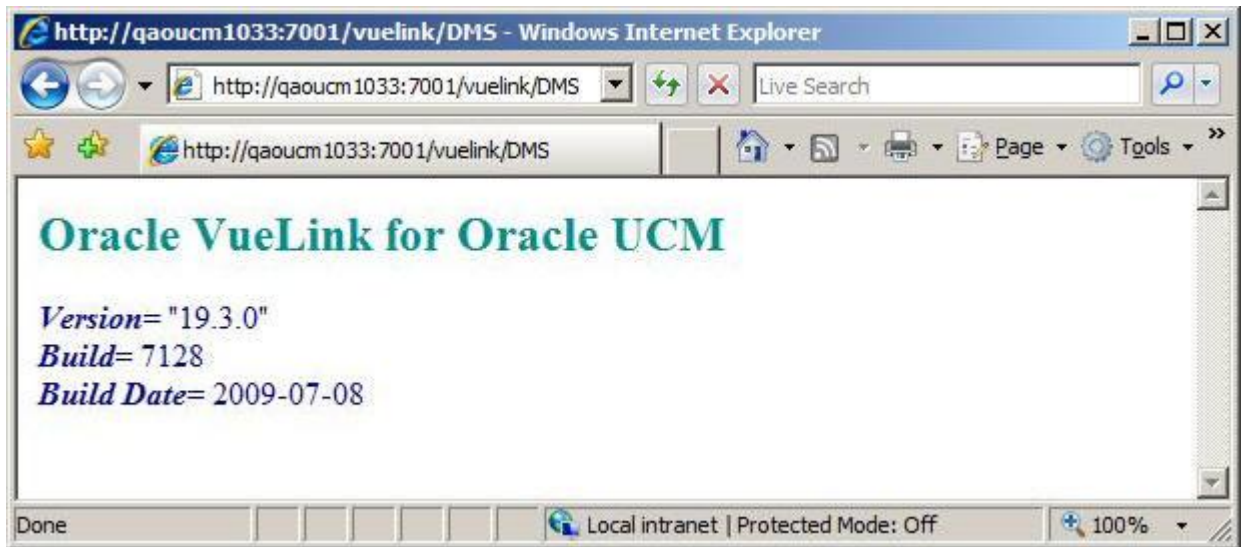
If you have installed UCM and Oracle AutoVue, then after you have installed Agile CNM, you must verify the configuration with AutoVue VueLink.

Note If AutoVue VueLink is already deployed on a server, you do not need to deploy it on the Agile CNM WebLogic server.

To verify the configuration:

1. Run the **startWebLogic** script located in the `AGILECNM_HOME\cnmdomain` directory to start the application server.
A command window appears. This window must remain open, but can be minimized.
2. Open your browser and use the following URL to open the Administration Console:
http://application_server_hostname:7001/console
A login window appears.
3. Type your WebLogic admin username and password.
The Administration Console displays.
4. On the left pane, click **Deployments**.
The deployed components are listed in a table.
5. Click **Install**, and then browse to the `<VueLinkHomeDirectory>\Vuelink_war\Vuelink` directory.
6. Click **Install**. Make sure the deployment success message appears after installation.
7. On the browser, enter the following URL:
http://application_server_hostname:7001/vuelink/DMS

A page similar to the following should appear if the system and application are deployed and configured properly:



Before Logging into the Application

This chapter includes the following:

- Migrating Users from Agile PLM or LDAP 25
- Starting Agile CNM 27
- Changing the WebLogic Admin Username and Password 27

After installing Agile CNM and before starting the application, you must perform the following tasks:

- Run the SQL script, which allows you to migrate users from Agile PLM or LDAP system to Agile CNM. For more details refer [Migrating Users from Agile PLM or LDAP](#) on page 25.
- Change and encrypt the default WebLogic admin username and password. The default admin username and password are weblogic and weblogic1 respectively. For more details refer [Changing the WebLogic Admin Username and Password](#) on page 27.

Note The server in standalone instance or the Admin server in cluster instance should be running to change the username and password.

Migrating Users from Agile PLM or LDAP

A SQL script is available after installation that allows you to migrate users from your Agile PLM or LDAP system to Agile CNM. The **generate_user_inserts** file is located in the \templates directory where you unzipped the database installation files.

Before running the script, a CSV-formatted text file named **infile.txt** must be created. The infile.txt file contains the user data needed to migrate to Agile CNM. The format of the file is as follows:

```
USERNAME, FIRST_NAME, LAST_NAME, EMAIL, ROLE_ID
where Role ID 1=Viewer, 2=Participant, and 3=Administrator
```

For example,

```
USERNAME, FIRST_NAME, LAST_NAME, EMAIL, ROLE_ID
viewer, Viewer, User, user01@agile.com, 1
participant, Participant, User, participant.user@cnm.oracle.com, 2
jsmith, John, Smith, jsmith@agile.com, 3
```

The header row must be the first line of the file. All fields are mandatory and cannot be left blank.

Migrating Users on Windows

To migrate users from Agile PLM or LDAP to Agile CNM on Windows:

1. Create a directory named cnmworkload on the machine where the Agile CNM database is installed.

2. Copy the generate_user_inserts.sql file from the \templates directory where you unzipped the database installation files to the cnmwkload directory.
3. Copy the infile.txt file to the cnmwkload directory.
4. Open a Command Prompt window.
5. Start SQL*Plus and login to the database as the system user.
6. Create an Oracle directory using the following example:

```
SQL> create or replace directory CNMWK_DIR as 'C:\cnmwkload';
```
7. Grant rights to the Oracle directory:

```
SQL> GRANT READ, WRITE ON DIRECTORY CNMWK_DIR TO PUBLIC;
```
8. Run the generate_user_inserts script:

```
SQL> @generate_user_inserts.sql
```
9. Verify that the outfile.sql file is created.
10. Run the following commands to revoke read and write access and drop the Oracle directory:

```
SQL> REVOKE WRITE ON DIRECTORY CNMWK_DIR FROM PUBLIC;  
SQL> REVOKE READ ON DIRECTORY CNMWK_DIR FROM PUBLIC;  
SQL> DROP directory CNMWK_DIR;
```
11. Log in to the Agile CNM database as the CNM user using SQL*Plus.
12. Run the outfile.sql script to insert the users into the Agile CNM database:

```
SQL> @outfile.sql
```

Migrating Users on UNIX

To migrate users from Agile PLM or LDAP to Agile CNM on UNIX:

1. Create the /tmp/cnmwkload directory on the machine where the Agile CNM database is installed.
2. Give the dba group write privileges:

```
tmp> chmod g+w cnmwkload
```
3. Copy the generate_user_inserts.sql file from the /templates directory where you unpacked the database installation files to the cnmwkload directory.
4. Copy the infile.txt file to the cnmwkload directory.
5. Convert both files to the UNIX format using the dos2unix command:

```
/tmp/cnmwkload> dos2unix infile.txt infile.txt  
/tmp/cnmwkload> dos2unix generate_user_inserts.sql  
generate_user_inserts.sql
```
6. Start SQL*Plus from a terminal window and login to the database as the system user.
If you log in as a different user, such as scott, you must run the following command for that user:

```
SQL> GRANT EXECUTE ON UTL_FILE TO scott;
```
7. Create an Oracle directory using the following example:

```
SQL> CREATE DIRECTORY CNMWK_DIR AS 'tmp/cnmwkload';
```


8. Grant rights to the Oracle directory:

```
SQL> GRANT READ ON DIRECTORY CNMWK_DIR TO PUBLIC;  
SQL> GRANT WRITE ON DIRECTORY CNMWK_DIR TO PUBLIC;
```

9. Run the generate_user_inserts script:

```
SQL> @generate_user_inserts.sql
```

10. Verify that the outfile.sql file is created.

11. Run the following commands to revoke read and write access and drop the Oracle directory:

```
SQL> REVOKE WRITE ON DIRECTORY CNMWK_DIR FROM PUBLIC;  
SQL> REVOKE READ ON DIRECTORY CNMWK_DIR FROM PUBLIC;  
SQL> DROP directory CNMWK_DIR;
```

12. Log in to the Agile CNM database as the CNM user using SQL*Plus.

13. Run the outfile.sql script to insert the users into the Agile CNM database:

```
SQL> @outfile.sql
```

Starting Agile CNM

To start Agile CNM:

1. Run the **startWebLogic** script located in the `AGILECNM_HOME\cnmdomain` directory to start the application server.

A command window appears. This window must remain open, but can be minimized.

2. Open your browser and use the following URL to test the connection:

http://application_server_hostname:7001/acnm

A login window appears.

Note Pop-up blockers should be enabled in your browser for the CNM URL.

3. Enter a login username and password.

If you have not migrated users from LDAP or Agile PLM, go to Migrating Users from Agile PLM or LDAP.

Changing the WebLogic Admin Username and Password

To change the default WebLogic admin username and password:

1. Go to the `<AGILECNM_HOME>\tools\change-wls-admin` directory.
2. Run the **change-wls-admin** script to change and encrypt the WebLogic username and password.
3. Enter old and new login credentials to change the wls admin password.

Note Make sure the new password you enter is at least 8 characters long.

Integrating Agile CNM and Agile PLM

This chapter includes the following:

- Configuring Agile PLM and Agile CNM 29
- Using Agile PLM 29

Configuring Agile PLM and Agile CNM

In order to eliminate the need to provide user credentials on view file and access reference links, you must perform the following steps to make changes to the `config.xml` file:

1. Provide fully qualified server names for Agile PLM and Agile CNM during installation.
2. Open the `config.xml` file, located in the `AGILECNM_HOME\cnmdomain\config` directory.
3. Set the value of the XML node `<ext:agile-url>` to the parent domain that covers the Agile PLM and Agile CNM servers. For example, ".mycompany.com" covers `cnm.mycompany.com` and `plm.mycompany.com`. Do not use top-level domain names, such as `.com`.

Note Be sure to add an extra dot before the parent domain name.

4. Save and close the file.
5. Restart the Agile CNM server.
6. Always log in to CNM with the fully qualified server name, for example, <http://mycnm.us.oracle.com/acnm>.

Using Agile PLM

If you are searching for references from Agile PLM or adding file attachments to Agile PLM File Manager, you must copy the following files from the `AGILECNM_HOME\lib` directory on Agile CNM application server to `AGILE_HOME\integration\sdk\extensions` directory on the Agile PLM application server:

- `agile-cnm-plugin.jar` and `gson-1.6.jar` for Agile PLM 9.3.x
- `agile-cnm-plugin-9.2.x.jar`, `backport-util-concurrent-3.1`, `gson-1.6-9.2.x.jar`, and `retrotranslator-runtime-1.2.9.jar` for Agile PLM 9.2.2.x

Important Make sure you restart the Agile PLM application server after deploying the files for Agile PLM 9.2.2.x.

Uninstalling Agile CNM

This chapter includes the following:

- Uninstalling on Windows..... 31
- Uninstalling on UNIX..... 31

This section provides steps to be followed to uninstall Agile CNM on Windows and UNIX.

Uninstalling on Windows

To uninstall Agile CNM on Windows:

1. Stop the Agile CNM service, if installed as a service. If Agile CNM is not installed as a service, choose **Start > All Programs > AgileCNM > Stop Agile CNM Server**.
2. Choose **Start > All Programs > AgileCNM > Uninstall Agile CNM**.
3. Click **Uninstall** on the Uninstall Agile CNM window.
4. Click **Done** when finished.

Uninstalling on UNIX

On UNIX, you can uninstall Agile CNM by deleting the entire Agile CNM directory or by using the Uninstaller.

To uninstall Agile CNM on UNIX by removing the directory:

1. Open a terminal window and change to the AGILECNM_HOME/cnmdomain directory.
2. Run **stopWebLogic.sh** to stop the Agile CNM server.
3. In the terminal window, change to the parent directory of <AGILECNM_HOME>.
4. Delete the AGILECNM_HOME folder:

UNIX: `rm -r <AGILECNM_HOME>`

Linux: `rm-rf <AGILECNM_HOME>`

To uninstall Agile CNM on UNIX using the Uninstaller:

1. Open a terminal window and change to the AGILECNM_HOME/cnmdomain directory.
2. Run **stopWebLogic.sh** to stop the Agile CNM server.
3. In the terminal window, change to the AGILECNM_HOME/Uninstaller directory.
4. Run **UninstallAgile_CNM** to start the uninstaller.
5. Click **Uninstall** on the Uninstall Agile CNM window and click **Done** when finished.

