



Installation Guide

Enterprise Portal – Information Edition

6.1

[Windows 2000]

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Contents

About This Book	v
CHAPTER 1 Overview	1
Product summary	1
CHAPTER 2 Installation Procedures	3
System requirements	3
Enterprise Portal default values	4
Pre-installation tasks	5
Installation tasks	5
Post-installation tasks	7
Verifying the installation	8
Configuring for a proxy server	9
Updating digital certificates	10
Changing the host, domain, and port of the portal	10
Configuring agentbuilder.jsp for Alerts	11
Configuring Tomcat for LDAP	12
Special upgrade instructions	13
Merging changed files	16
Uninstalling EP	18
CHAPTER 3 Getting Started	19
Getting started with Portal Interface	19
Getting started with Web Studio	22
Starting and stopping the system	26
Starting and stopping the database	26
Starting and stopping Tomcat application server	26
APPENDIX A Installing EP in EAServer 5.1	29
Overview	29
Installing EP 6.1 in EAServer	30
Configuring LDAP for EAServer	32

	Uninstalling EP 6.1 from EAServer	32
APPENDIX B	Setting Up Authentication and Authorization	35
	Overview	35
	Configuring the CSI realm	36
	Configure the Tomcat realm	36
	Configure the EAServer realm	37
	Configuring the security provider	38
	Configure the LDAP provider	39
	Restore the PortalDB provider configuration	46
	Index	49

About This Book

Audience

This guide is for Sybase® system administrators and other qualified professionals who are familiar with their system's environment, networks, disk resources, and media devices.

How to use this book

This book contains the following chapters:

- Chapter 1, "Overview," is the overview of the Enterprise Portal – Information Edition installation.
- Chapter 2, "Installation Procedures," describes system requirements, how to install Enterprise Portal – Information Edition on your system, how to perform special installation procedures, how to uninstall Enterprise Portal – Information Edition, and how to upgrade from an earlier version.
- Chapter 3, "Getting Started," describes how to get started using the Portal Interface and the Web Studio.
- Appendix A, "Installing EP in EAServer 5.1" describes how to deploy Enterprise Portal – Information Edition to EAServer.
- Appendix B, "Setting Up Authentication and Authorization" describes how to set up authentication and authorization using either Tomcat or EAServer, and either the portal database or a Lightweight Directory Access Protocol (LDAP) server.

Related documents

Enterprise Portal – Information Edition documentation The following Enterprise Portal documents are available on the Getting Started with Enterprise Portal CD:

- The Enterprise Portal – Information Edition release bulletin for your platform contains last-minute information not documented elsewhere.
- The Enterprise Portal – Information Edition installation guide for your platform contains installation instructions.

Enterprise Portal online documentation The following Enterprise Portal documents are available in PDF and DynaText format on the Enterprise Portal 6.1 Technical Library CD:

-
- The *Enterprise Portal Developer's Guide* includes developer-related topics for Enterprise Portal components, Portal Interface portlets, and Java Template Framework pages.
 - The *Portal Interface User's Guide* describes the Portal Interface user interface and how to use Portal Interface to build and manage your enterprise's portal.
 - The *Enterprise Portal – Information Edition Feature Guide* describes the features available in 6.1.

jConnect™ for JDBC™ documents Enterprise Portal 6.1 includes the jConnect for JDBC driver to allow JDBC access to Sybase database servers and gateways. The *Programmer's Reference jConnect for JDBC* is included on the Enterprise Portal Technical Library CD.

Note See the *Technical Library Installation Guide* in your documentation package for instructions on installing and starting the Technical Library.

Other sources of information

Use the Sybase Getting Started CD, the Sybase Technical Library CD, and the Technical Library Product Manuals Web site to learn more about your product:

- The Getting Started CD contains release bulletins and installation guides in PDF format, and may also contain other documents or updated information not included on the Technical Library CD. It is included with your software. To read or print documents on the Getting Started CD, you need Adobe Acrobat Reader (downloadable at no charge from the Adobe Web site, using a link provided on the CD).
- The Technical Library CD contains product manuals and is included with your software. The DynaText reader (included on the Technical Library CD) allows you to access technical information about your product in an easy-to-use format.

Refer to the *Technical Library Installation Guide* in your documentation package for instructions on installing and starting the Technical Library.

- The Technical Library Product Manuals Web site is an HTML version of the Technical Library CD that you can access using a standard Web browser. In addition to product manuals, you will find links to EBFs/Updates, Technical Documents, Case Management, Solved Cases, newsgroups, and the Sybase Developer Network.

To access the Technical Library Product Manuals Web site, go to Product Manuals at <http://www.sybase.com/support/manuals/>.

Sybase certifications on the Web

Technical documentation at the Sybase Web site is updated frequently.

❖ Finding the latest information on product certifications

- 1 Point your Web browser to Technical Documents at <http://www.sybase.com/support/techdocs/>.
- 2 Select Products from the navigation bar on the left.
- 3 Select a product name from the product list and click Go.
- 4 Select the Certification Report filter, specify a time frame, and click Go.
- 5 Click a Certification Report title to display the report.

❖ Creating a personalized view of the Sybase Web site (including support pages)

Set up a MySybase profile. MySybase is a free service that allows you to create a personalized view of Sybase Web pages.

- 1 Point your Web browser to Technical Documents at <http://www.sybase.com/support/techdocs/>.
- 2 Click MySybase and create a MySybase profile.

Sybase EBFs and software maintenance

❖ Finding the latest information on EBFs and software maintenance

- 1 Point your Web browser to the Sybase Support Page at <http://www.sybase.com/support>.
- 2 Select EBFs/Maintenance. Enter user name and password information, if prompted (for existing Web accounts) or create a new account (a free service).
- 3 Select a product.
- 4 Specify a time frame and click Go.
- 5 Click the Info icon to display the EBF/Maintenance report, or click the product description to download the software.

Conventions

The syntax conventions used in this manual are:

Key	Definition
commands and methods	Command names, command option names, utility names, utility flags, Java methods/classes/packages, and other keywords are in lowercase Arial font.
<i>variable</i>	Italic font indicates: <ul style="list-style-type: none"> • Program variables, such as <i>myServer</i> • Parts of input text that must be substituted, for example: <code>Server.log</code> • File names
<code>%SYBASE%</code>	Variable used to represent the Sybase Enterprise Portal installation directory.
File Save	Menu names and menu items are displayed in plain text. The vertical bar shows you how to navigate menu selections. For example, File Save indicates “select Save from the File menu.”
package 1	Monospace font indicates: <ul style="list-style-type: none"> • Information that you enter in a GUI interface, a command line, or as program text • Sample program fragments • Sample output fragments

Note The installation and post-installation instructions frequently refer to the `%SYBASE%`, `%JAGUAR%`, and `%JAVA_HOME%` variables.

`%SYBASE%` refers to the Enterprise Portal – Information Edition installation directory, for example, `C:\Sybase` or `C:\Sybase\UA_61`.

`%JAGUAR%` refers to the EAServer installation directory (if you are running Enterprise Portal – Information Edition in EAServer 5.1). This document assumes EAServer is installed in the same root directory as Adaptive Server Anywhere and Tomcat, so `%JAGUAR%` is equivalent to `%SYBASE%\EAServer`.

`%JAVA_HOME%` refers to a valid JVM directory.

If you need help

Each Sybase installation that has purchased a support contract has one or more designated people who are authorized to contact Sybase Technical Support. If you cannot resolve a problem using the manuals or online help, please have the designated person contact Sybase Technical Support or the Sybase subsidiary in your area.

This guide explains how to install Enterprise Portal – Information Edition version 6.1.

Topic	Page
Product summary	1

Product summary

This version is for Sybase Enterprise Portal – Information Edition 6.1, which is compatible with the following platform and operating system configurations:

- Microsoft Windows 2000

Sybase Enterprise Portal – Information Edition (EP) 6.1 is a ready-to-deploy solution that easily consolidates Web-accessible information sources and aggregates existing applications into a personalized view. This provides your employees, partners, and customers immediate access to the information and services they need to perform their jobs. EP combines ease-of-use and an intuitive user interface with advanced administration for enterprise application integration. With a completely browser-based management component, the portal translates the simplicity of the end-user experience to the developer and administrator, leading to a reduction in the time and cost of portal projects.

The Information Edition is the entry-level edition of the Sybase Enterprise Portal family and is the perfect solution for small projects and proof-of-concepts. It is designed for rapid deployment of information or content. You can install the product in a few minutes and quickly create portlets from JavaServer Pages (JSP) applications, Web accessible information sources, eXtensible Markup Language (XML) feeds, HyperText Markup Language (HTML) fragments, and databases.

Installation Procedures

This chapter describes how to install Enterprise Portal – Information Edition (EP) on Windows 2000.

The application database is supported on Adaptive Server® Anywhere. A Web browser provides access to Web Studio and Portal Interface.

Topic	Page
System requirements	3
Enterprise Portal default values	4
Pre-installation tasks	5
Installation tasks	5
Post-installation tasks	7
Configuring Tomcat for LDAP	12
Special upgrade instructions	13
Uninstalling EP	18

System requirements

Table 2-1 lists system requirements.

Note Go to the Technical Library Product Manuals Web site at <http://www.sybase.com/support/manuals>, or see the release bulletin for your platform for components that require operating system patches.

Table 2-1: System requirements

Platform and OS	Release level	RAM	Disk space	Network protocol	Web browser
Windows 2000 minimum 750Mhz	Service Pack 2+	512 MB minimum 2.0G recommended	2.0G minimum	TCP, IPX/SPX, and Named Pipes	To access Portal Interface, use Internet Explorer 5.5 + or Netscape Navigator 7.01+. To access Web Studio, use Internet Explorer version 5.5 or 6.0.

Enterprise Portal default values

Table 2-2 lists the default values for the user names, passwords, and port numbers for Enterprise Portal.

Table 2-2: Enterprise Portal default installation values

Component	Default values	Description
<i>Local Host Machine</i>		
Local host machine name		The machine name; for example, "lab2".
Enterprise Portal port	4040	
<i>Adaptive Server Anywhere</i>		
ASA port number	4747	
ASA administrator user name	dba	The user name used to log in to Adaptive Server Anywhere.
ASA administrator password	SQL	The password used to log in to Adaptive Server Anywhere.
<i>Web Studio</i>		
User name	opsuper	The user name used to log in to Web Studio. The account is created automatically during installation.
Password	0psuper (the first character is a zero)	The password used to log in to Web Studio.

Note If you are using Netscape 7.0.x and using HTTPS to protect passwords during login, you must run the EP using ports 80 (HTTP) and 443 (HTTPS).

Pre-installation tasks

Before you install EP, you must:

- Verify that you have 512MB free space in your temporary directory, otherwise the installation fails.
- Verify that you have write permission on the directory where you install the software, and the *x:\tmp\logs* directory (where *x:* is the installation drive). If a *logs* directory does not exist, one is automatically created during installation.
- Know the domain name of the machine where you are installing EP. To find your domain name, contact your system administrator, or at a command prompt, enter:

```
ipconfig /all
```

Your domain displays in the “Connection-specific DNS Suffix” setting.

Note If you do not have a domain, you can only install the demo version of EP.

Installation tasks

Typically, you install EP in a network environment. EP also includes a demo version of the product that you can install on a local machine. The demo version is useful for sales demos, and in environments that do not have a domain name. This section discusses installing EP in a network environment, but also includes special instructions for installing the demo version.

Installation takes five to ten minutes, depending on the speed of your machine.

Note If you are performing an upgrade from version 6.0 to 6.1, see “Special upgrade instructions” on page 13.

❖ **Installing EP**

- 1 Create an installation directory in which to install EP; for example, *C:\Sybase*. This directory is referred to as *%SYBASE%* in this guide.

Note Do not use spaces in the directory name. Due to a problem with Tomcat, when you install into a directory with spaces in the name, Enterprise Portal – Information Edition will not run properly.

- 2 Using a zip utility, extract the *IE610.zip* file from the CD into the installation directory. The command for extracting the file depends on the utility you are using.

Note Make sure the zip utility allows the archive to create new folders in the location where you unzip it.

- 3 Using a text editor, check the *hosts* file, located in *C:\WINNT\system32\drivers\etc\hosts*, and verify you have the following entry:

```
127.0.0.1 localhost
```

For the demo system, enter:

```
127.0.0.1 localhost demo.sybase.com
```

See “Changing the host, domain, and port of the portal” on page 10 for information.

- 4 Save the *hosts* file and exit the text editor.
- 5 If you are installing the demo system, go to step 6.

If you are installing EP on a network, open a Command Prompt window, and navigate to:

```
%SYBASE%\infoedition
```

Enter `config`, or double-click the file in Windows Explorer.

This modifies the host name values in the *global.properties.xml* to the machine's name. The *global.properties.xml* file is located in *%SYBASE%\infoedition\tomcat\webapps\onepage\config* and contains many system settings.

This also modifies the host name and other values in the *portalexplorer.properties* file, which is located in *%SYBASE%\infoedition\tomcat\webapps\portalexplorer\WEB-INF\classes\portalexplorer.properties*.

- 6 By default, the domain name in the *global.properties.xml* file is "sybase.com." To change the domain for your environment, modify *global.properties.xml* to use the domain name of the network on which your machine resides. See "Changing the host, domain, and port of the portal" on page 10.
- 7 From the Command Prompt window, enter `startdb`, or double-click the file in Windows Explorer.

This starts the Adaptive Server Anywhere database. You may see several "Ping server failed – Database server not found" messages. You can disregard these messages.

When the database starts, you see "Ping server successful," and the icon for the Sybase ASA database appears in your taskbar.

- 8 From the Command Prompt window, enter `starttomcat`, or double-click the file in Windows Explorer.

When Tomcat starts, you see:

```
Starting service Tomcat-Standalone
Apache Tomcat/4.1.29
```

Minimize the Tomcat window. Do not close the window.

- 9 The EP installation is complete. See "Verifying the installation" on page 8 to make sure the network installation works correctly.

Post-installation tasks

This section describes post-installation steps.

- Verifying the installation
- Configuring for a proxy server

- Updating digital certificates
- Changing the host, domain, and port of the portal
- Configuring agentbuilder.jsp for Alerts

Verifying the installation

Verify that your EP installation is operating correctly.

❖ Checking the installation

- 1 Verify the Portal Interface installation by opening a browser window and entering:

```
http://HOSTNAME.PORTALDOMAIN:port/onepage/  
index.jsp
```

where:

- *HOSTNAME* – the name of the machine where you installed Enterprise Portal – Information Edition 6.1; for example, “lab2k”.
- *PORTALDOMAIN* – the domain name where the installation is located; for example, “sybase.com”.
- *port* – the port number (the default is 4040).

For example:

```
http://lab2k.sybase.com:4040/onepage/index.jsp
```

Or, if you are using the demo system, enter:

```
http://demo.sybase.com:4040/onepage/index.jsp
```

- 2 Click Join Now to set up a new user profile. See “Getting started with Portal Interface” on page 19 for more information about setting up a user profile and using Portal Interface.
- 3 Verify the Web Studio installation by opening a browser window and navigating to:

```
http://HOSTNAME.PORTALDOMAIN:port/onepage/  
index.html
```

For example, if your machine’s name is “lab2k,” your portal domain is “sybase.com,” and your HTTP port number is “4040,” enter:

```
http://lab2k.sybase.com:4040/onepage/index.html
```

Or, if you are using the demo system, enter:

```
http://demo.sybase.com:4040/onepage/index.html
```

Note Web Studio is accessible only through Microsoft Internet Explorer 5.5 and 6.0.

- 4 Log in using `opsuper` as the user name, and `opsuper` (the first character is a zero) as the password. See “Getting started with Web Studio” on page 22 for more information.

Configuring for a proxy server

If you are using a proxy server, you must configure EP with the appropriate proxy settings.

❖ Using EP behind a proxy server

- 1 Go to `\tomcat\webapps\onepage\config`.
- 2 Using a text editor, open `global.properties.xml` and change the proxy value to “on.” For example:

```
Property name="proxy" value="on"
description="(on/off). on ONLY if a squid type http
proxy is installed/available" menugroup="10"/
```

- 3 Change the `proxy.host` value to the IP address or host name of the proxy server. For example, if your proxy server host name is “`proxy.hostname.com`,” the line looks like this:

```
Property name="proxy.host"
value="proxy.hostname.com"
description="(127.0.0.1). configure only if
proxy=on. IP of the squid server" menugroup="100"/
```

- 4 Change the `proxy.port` value to the port number on which the proxy server is running. For example, if the port is 1234, the line looks like this:

```
Property name="proxy.port" value="1234"
description="(3128). configure only if proxy=on.
port where squid cache is running" menugroup="100"/
```

- 5 To the `proxy.bypass_list` value, add the IP addresses or host names that should bypass the proxy server. You must keep the loopback address and local host in the bypass list. For example, if you want requests for URLs that end with “sybase.com” or start with “syberspace” to bypass the proxy server, enter:

```
Property name="proxy.bypass_list" value
="127.0.0.1|localhost|sybase.com|syberspace"
description="(host1|host2). please read
HTTPConnection javadocs for info on dontProxyFor()
method for more info" menugroup="100"/
```

Updating digital certificates

User authentication for the portal uses HTTPS, which uses Secure Sockets Layer (SSL) for posting the user names and passwords that users enter in an encrypted form over a secure channel. SSL and HTTPS rely on the usage of digital certificates, which are typically verified and signed by third-party trust authorities.

EP uses a certificate that is created using the `keytool` utility that ships with Java Development Kit (JDK) 1.3. This certificate is not signed by any trusted authority; therefore, you see the Security Alert pop-up when you sign in with your user name and password. Replace the `.keystore` file in the product folder with your certificate file of the same name.

Changing the host, domain, and port of the portal

By default, EP uses `demo.sybase.com:4040` for the host, domain, and port.

To run the demo system on local host, make the following entry in the `hosts` file:

```
127.0.0.1 localhost demo.sybase.com
```

To run EP in your network environment, change the host name and domain name for your environment; you may want to change the port if the port number is already used in your system.

For example, for EP to use `epdemo.example.com:5050` (“epdemo” is the host, “example.com” is the domain, and 5050 is the port), follow these steps:

- 1 Using a text editor, edit the *hosts* file located in *C:\WINNT\system32\drivers\etc\hosts* by inserting the following entry on the last line:

```
127.0.0.1 localhost epdemo.example.com
```

- 2 Save the *hosts* file and close it.

Note You may want to change other ports, such as the redirect port. If so, make corresponding changes to the *global.properties.xml* and *server.xml* files.

❖ Accessing EP from your network

When you run *config*, the default host name “demo” is automatically changed to the machine name on which you installed Enterprise Portal 6.1. To complete the configuration process:

- 1 Using a text editor, open the *global.properties.xml* file, located in *\tomcat\webapps\onepage\config*, and:
 - a Search for all instances of *host_name*, where *host_name* is the name of the machine where you installed EP, and replace each instance with the new host name.
 - b Search for all instances of *sybase.com*, and replace each instance with your domain name.
 - c Search for all instances of *4040*, and replace each instance with the new port number.
 - d Save *global.properties.xml* and close it.
- 2 Using a text editor, open the *server.xml* file, located in *\tomcat\conf*, and:
 - a Search for all instances of *4040*, and replace each instance with the new port number.
 - b Save *server.xml* and close it.
- 3 Stop and restart the Tomcat application server as described in “Starting and stopping Tomcat application server” on page 26.

Configuring *agentbuilder.jsp* for Alerts

Modify the *agentbuilder.jsp* file to enable the Alert feature to work on resource identifiers (rid) other than 1.

❖ **Modifying *agentbuilder.jsp***

- 1 In Windows Explorer, navigate to
%SYBASE%\infoedition\tomcat\webapps\onepage\home\docapps\agentbuilder.
- 2 Copy *agentbuilder.jsp* to *agentbuilder.jsp-orig* as a backup.
- 3 With a text editor, open *agentbuilder.jsp*.
- 4 In *agentbuilder.jsp*, search for the following:

```
<%if ( _apps.equals("pi") && _pi_cmd.equals  
("addSchedule") ) { %>  
  
var IDsNode1 = requestDoc.selectSingleNode  
("//RequestDef/RequestType/IDs");
```
- 5 Remove "`&& _pi_cmd.equals("addSchedule")`" from the line as follows:

Original:

```
<%if ( _apps.equals("pi") && _pi_cmd.equals  
("addSchedule") ) { %>
```

After modified:

```
<%if ( _apps.equals("pi")) { %>
```
- 6 Save the file and close it.

Configuring Tomcat for LDAP

Tomcat comes preconfigured with Common Security Infrastructure (CSI) and PortalDB provider. To configure Tomcat to use Lightweight Directory Access Protocol (LDAP), see Appendix B, “Setting Up Authentication and Authorization.” The instructions are the same as EAServer instructions used to configure the CSI files to use LDAP. Check the Release Bulletin for additional information needed to run Web Studio successfully (CR #359766).

Special upgrade instructions

You can run the EP 6.1 upgrade script to save certain files in the current installation and unpack the latest *infoedition.zip* file on top of the 6.0 installation. Everything is replaced, including ASA, Tomcat and JRE.

Before performing the upgrade:

- Create a system backup of the machines on which EP 6.0 is installed.
- Verify that ASA and Tomcat are running.
- Verify that a temporary directory exists on the machine where you are performing the upgrade. If one does not exist, create it; for example, *C:\tmp* or *D:\tmp*.
- Verify that the *%SYBASE%* environment variable is set to the Sybase installation directory where ASA and Tomcat are installed.

To verify this variable, open a DOS command window, and enter:

```
echo %variable%
```

where *%variable%* is the name of the variable you want to verify.

- Verify that the *%TEMP%* and *%TMP%* environment variables are set correctly; for example:

```
echo %TEMP%
D:\temp
echo %TMP%
D:\temp
```

❖ Upgrading EP 6.0 to 6.1

The script for performing the upgrade is located in the *IE610-UPDT-win.zip* file in the root directory of the EP 6.1 CD. Using a zip utility, expand the file to a temporary directory.

- 1 Change to the *update* directory, and open a Command prompt window. Enter:

```
update-ie6_1
```

You see “Welcome to the Enterprise Portal Info Edition 6.1 upgrade” and an overview of the upgrade procedure.

- 2 Respond to the prompts that display. Each prompt appears on a command line followed by a value in square brackets []. The value in brackets is the default, based on the values set for *%SYBASE%*.

Press Enter to accept the default value, or enter a new value and press Enter.

Upgrade script prompt	Default entry or example
Tomcat host name	The name of the machine where Tomcat is installed; for example: lab2k Warning! Do not enter “localhost.” You must enter or accept the machine name.
Tomcat port number	The port number used to connect to Tomcat. 4040
ASA host name	The name of the machine where Adaptive Server Anywhere is installed. The script displays the machine name you entered for the Tomcat host name as the default; for example: lab2k
ASA port number	The port number used to connect to Adaptive Server Anywhere. 4747
ASA admin user name	The administrator user name used to log in to Adaptive Server Anywhere. dba
ASA admin password	The password the administrator uses to log in to Adaptive Server Anywhere. SQL

The input parameters are validated. You see:

```
Validating host mysysname:4747....
```

```
Validating database server mysysname:4747  
dba/SQL....
```

```
Validating host mysysname:4040....
```

- 3 Any errors resulting from the validation display, as well as a summary of your input. You are then given a final opportunity to accept the input and proceed with the update.

```
Current environment is:
```

```
APASSWORD = SQL
```

```
APOINT = 4747
```

```
AUSER = dba
```

```
TPOINT = 4040
```

```
AHOST = mysysname
```

```
THOST = mysysname
```


Use this (yes|no) [yes]:

Press Enter if the entries are correct and you want to proceed.

If any of the entries are incorrect, enter no and press Enter. The script prompts you again for the upgrade information. You can correct any of the entries you made.

When you answer yes to the final prompt, the upgrade proceeds. When the upgrade process starts the new Tomcat server, a new Command Prompt window is created.

4 You see the following output:

```
....Verify that database is running
....Check current version
....Stopping servers
....Wait for Tomcat to stop
....Wait some more
.....
....Check disk space
....Back up the current installation
....Checksum the current installation
....Removing old tomcat and jdk
....Deploy update
....Determine changes
....Determine user only changes
....Update global.properties.xml
....Restore some things
....Update oem.xml
....Restore user apps
....Starting ASA
Adaptive Server Anywhere Server Ping Utility Version
8.0.0.2065
Ping server failed -- Database server not found.
Adaptive Server Anywhere Server Ping Utility Version
8.0.0.2065
Ping server failed -- Database server not found.
Adaptive Server Anywhere Server Ping Utility Version
8.0.0.2065
Ping server failed -- Database server not found.
Adaptive Server Anywhere Server Ping Utility Version
8.0.0.2065
Ping server failed -- Database server not found.
Adaptive Server Anywhere Server Ping Utility Version
8.0.0.2065
Ping server failed -- Database server not found.
Adaptive Server Anywhere Server Ping Utility Version
```

```
8.0.0.2065
Ping server failed -- Database server not found.
Adaptive Server Anywhere Server Ping Utility Version
8.0.0.2065
Ping server failed -- Database server not found.
Adaptive Server Anywhere Server Ping Utility Version
8.0.0.2065
Ping server failed -- Database server not found
Failed to start Portal Database
....Give ASA time to start
.....
....Update database data
....Update database stored procs
....Restore user added files
....Execute unjar script
....Starting Tomcat
....Give it time to get going
.....
....Verify that Tomcat is running
Upgrade complete
```

- 5 When the process finishes, you may see a message listing files that were modified by both you and Sybase. If you see the message, you must manually merge these files to update your installation, as described in “Merging changed files” on page 16.
- 6 If you encounter problems during the upgrade process, check the *update-ie6_1.log* in the %SYBASE% directory.
- 7 Close the Command Prompt window that was used to start Tomcat during the upgrade process (not the Command Prompt window in which Tomcat is running).

Merging changed files

You must perform this procedure only to preserve settings or customizations from an earlier EP installation. After the upgrade completes successfully, you may see a list of files that you must merge manually.

The files that need to be manually merged are located in
`%SYBASE%\backup\onepage-both-chgs_XX.lst`.

Note The generated files have a timestamp in their names for tracking purposes (indicated above by *XX*, where *XX* is a date/timestamp in the format “YYYYMMDDhhmm”).

Also, note that “PROGRA~1” is specified, rather than “Program Files.” The start-up script for Tomcat cannot handle path names with spaces. You must either perform the installation in *C:\Sybase*, or use the eight-character version of the name.

❖ **Merging changed files**

- 1 Expand the backed up WAR file into a temporary directory.
 - a Open the Windows Explorer.
 - b Select an existing temporary folder—for example, *C:\WINNT\temp*—or create a new temporary folder.
 - c Ensure the path is set properly to the *jdk.14\bin* folder where *jar.exe* is located.

Because *jar.exe* expands the file to the directory in which you are located, change to the temporary directory and expand the WAR file. In a Command prompt window, enter:

```
cd C:\WINNT\temp\  
jar -xvf %SYBASE%\backup\onepage.war_XX
```

XX is a date/timestamp in the format “YYYYMMDDhhmm” that indicates when you can the upgrade or when the file was generated. If you run the upgrade more than once, there are multiple copies of these files—use the earliest version for your changes.

- 2 For each file in the *onepage-both-chgs_XX.lst* file, use a file merge utility to reintegrate your 6.0 portal changes into your new 6.1 portal.

Note If you do not own a file merge utility, perform an Internet search for “file merge utility”. The search results let you access dozens of file merge utilities, many of which are shareware.

Uninstalling EP

If necessary, you can easily uninstall EP.

❖ Removing EP

- 1 Shut down the Sybase ASA database and Tomcat server.

To shut down Tomcat, enter:

```
stoptomcat
```

To shut down ASA, in a command window, enter:

```
stopdatabase
```

- 2 Delete the *%SYBASE%\infoedition* directory.
- 3 Delete the *x:\tmp* directory used for log files.

This chapter describes how to start using the Portal Interface and Web Studio.

Topic	Page
Getting started with Portal Interface	19
Getting started with Web Studio	22
Starting and stopping the system	26

Getting started with Portal Interface

This section provides a quick tutorial for using the Portal Interface. In this tutorial, create a basic portlet using an existing Web portlet. For detailed information, see the *Portal Interface User's Guide*.

❖ Logging in to Portal Interface

- 1 Open a browser window, and enter:

```
http://HOSTNAME.PORTALDOMAIN:port/onepage/
index.jsp
```

where:

- *HOSTNAME* – name of the machine where you installed Enterprise Portal – Information Edition (EP) 6.1.
- *PORTALDOMAIN* – domain name where the installation is located.
- *port* – port number (the default is 4040).

For example, enter:

```
http://lab2k.sybase.com:4040/onepage/index.jsp
```

For the demo system, enter:

```
http://demo.sybase.com:4040/onepage/index.jsp
```

- 2 Click Join Now.

❖ **Entering your profile information**

- 1 Enter your first name.
- 2 Enter your last name.
- 3 Enter your e-mail address.
- 4 Enter your telephone number.
- 5 Choose a member name.
- 6 Choose a password.
- 7 Confirm your password.
- 8 Select the PortalUser role.
- 9 Read the terms and conditions. If you agree, select the “I agree to the terms and conditions” box and click Done.

You see the Portal Interface default page group. To add pages and portlets, you must first add a new page group.

❖ **Creating new page groups**

- 1 Click Manage Pages.
- 2 In the Manage Pages window, click Add Page Group.
- 3 In the Add Page Group window, enter `myTest` as the name for the page group.
- 4 Optionally, you can select additional devices from available navigation styles. The navigation style allows you to specify how you navigate pages based on your operating system and browser.

When you create a page group, select the navigation style from the Available list, then click the right arrow to move it to the Assigned list.

Note To remove a navigation style from the Assigned list, select the style and click the left arrow to move it back to the Available list.

- 5 Click Done.

You see the first page of the page group you just created. The first page of the new group is automatically assigned the same name as the page group.

The new page group now appears in the page group as a tab and as a selection in the toolbar drop-down list.

❖ **Creating new pages**

- 1 Select the page group where you want your page to appear. Click Add Page at the top of the window.
- 2 Select “Add new page,” and enter a name for your new page. Choose a unique name for your new page; if the page name already exists within that page group, you cannot create the new page. For example, type your name.
- 3 Select the Page Layout 30/70, and click Done.

Your new page name appears in the page tabs, at the far right. You can change the order of the page tabs using the Manage Pages option at the top of the window and editing the page group.

❖ **Adding a portlet**

- 1 Click Add Portlet.
- 2 In the Add Portlet window, click the Search branch. A list of existing portlets displays.
- 3 Click the Google Search portlet.
- 4 Click Done to close the Add Portlet pop-up. The Google search portlet appears on the page. You can use the portlet to perform a Web search.

❖ **Creating a portlet**

- 1 Click Create Portlet.
- 2 In the Create Portlet wizard URL field, enter:
`www.sybase.com`
- 3 Click Go.
- 4 In the right pane, click Press (use the vertical scroll bar to scroll up and down if necessary to locate Press).
- 5 Click Next in the upper-right corner.
- 6 After the preview refreshes, click the first press release (the first bulleted link) under Press in the middle pane. The cursor flag gives instructions.
- 7 After the preview refreshes, click the second Add button (the next bulleted link). The Sybase press release list is added to your page. Click a link to access the press release.

- 8 Either log out, or minimize the window. If the browser session expires, you must log in again when prompted.

Getting started with Web Studio

This section provides a quick tutorial for using the Web Studio. In this tutorial, create an interactive portlet using an existing Web portlet. For detailed information, see the *Enterprise Portal – Information Edition Feature Guide* and the *Enterprise Portal Development Guide*.

Note You must use Internet Explorer 5.5 or 6.0 to access Web Studio.

❖ Logging in to Web Studio

- 1 Open a new browser window, and enter:

```
http://HOSTNAME.PORTALDOMAIN:port/onepage/  
index.html
```

where:

- *HOSTNAME* – the name of the machine where you installed EP 6.1.
- *PORTALDOMAIN* – the domain name where the installation is located.
- *port* – the port number (the default is 4040).

For example, enter:

```
http://lab2k.sybase.com:4040/onepage/index.html
```

For the demo system, enter:

```
http://demo.sybase.com:4040/onepage/index.html
```

- 2 In the User Name field, enter:

```
opsuper
```

- 3 In the Password field, enter:

```
0psuper
```

The first character is zero. The Web Studio window displays.

❖ Creating an interactive Web element (stock quote)

- 1 Select Portlets in the left pane.
- 2 Select New from the Portlet Manager toolbar, and click the New button to open Portlet Builder.
- 3 Click the down arrow next to Add, and select Web Element from the drop-down list, or click Add, which opens the Web Element wizard.
- 4 In the Location field, enter `cbs.marketwatch.com`, and click Find.
- 5 If prompted, click the “Direct to cbs.marketwatch.com” link.
- 6 In the Enter Symbols field in the left pane, enter `SY`, and click the Quote/News arrow.
Click Next in the upper-right corner.
- 7 After the preview refreshes, click the word “Last” in the quote table. The cursor flag provides instructions.
- 8 After the preview refreshes, click Select next to the option that displays the entire quote table. You can scroll up and down to view other formats.
Click Next in the upper-right corner.
- 9 After the preview refreshes, click the Variable box, which is next to the “symb” parameter.
- 10 In the Display Name field, enter `Symbol`, and in the Default Value field, enter `SY`.
Click Next in the upper-right corner.
- 11 After the preview refreshes, enter `Quote` in the Element Name field.
Click Next.
- 12 In the Continuous Capture window, click Finish to close the Portlet Builder wizard.
- 13 Test the portlet by entering `IBM` in the Symbol field, and clicking Update.

❖ Saving the portlet

- 1 Click Save in the upper-left corner.
- 2 In the Finish window:
Content tab Enter `Stock Quote` in the Name field, and click In Context.
Roles tab Click Add All to select all roles.

Administration tab From the Category and Subcategory drop-down lists, select Business and Investing.

- 3 Click Finish in the upper-right corner.
- 4 In the confirmation pop-up, click OK.
- 5 Click Close in the upper-right corner to close the Portlet Builder.

❖ **Approving the portlet**

- 1 Click Portlet in the left pane, and click New in Portlet Manager Status menu. The new portlet loads in the detail pane.
- 2 Right-click the Stock Quote portlet in the detail pane, and select Approval Status | Approved.
- 3 From the Approval Status submenu, and select Approved.
- 4 In the confirmation pop-up, click OK. The portlet is now listed under the Approved Status menu.

❖ **Updating the portlet catalog**

- 1 In the left pane, click Catalogs.
- 2 From the Catalog Manager menu, click the Approved branch in the Status tree.
- 3 Double-click the Default Catalog with version 1.0.
- 4 In the Catalog Builder window, select the Search branch.
Click Add in the Catalog Builder toolbar.
- 5 From the Find Portlet pop-up, click Search.
- 6 From the Find Portlet result list, select the Stock Quote portlet, and click Add. The Find Portlet window closes.
- 7 In the Catalog Builder toolbar, click Save.
- 8 In the confirmation pop-up window, click OK.
- 9 Click Close in the upper-right corner. The Catalog Builder closes.

❖ **Approving the updated portlet catalog**

- 1 From the Catalog Manager, under the Status tree, click the New branch.
- 2 In the Catalog Manager detail view, right-click Default Catalog version 1.1.

- 3 Scroll down to the Approval Status selection. From the Approval Status submenu, select Approved.
- 4 In the confirmation pop-up, click OK.

❖ **Making the updated portlet catalog active**

- 1 From the Catalog Manager menu, under the Status tree, click the Approved branch.
- 2 In the Catalog Manager detail view, right-click the Default Catalog version 2.0.
- 3 Scroll down to the Active selection, and from the Active submenu, select Yes.
- 4 In the warning pop-up window, click OK.
- 5 In the confirmation pop-up window, click OK.

❖ **Updating the Portal Interface**

- 1 Select Update from the Catalog Manager toolbar.
- 2 Click OK in the confirmation pop-up.

❖ **Adding the stock quote portlet to the demo page**

- 1 Log in to the Portal Interface using the same account you used in “Getting started with Portal Interface” on page 19.
- 2 Select the `myTest` page.
- 3 Click Add Portlet.
- 4 Click the Search branch.
- 5 Click the Stock Quote portlet.
- 6 Click Done to close the Add Portlet pop-up.
- 7 Use the vertical scroll bar to scroll down to view the Stock Quote portlet.
- 8 In the Stock Quote portlet, enter `IBM` in the Symbol input field.
- 9 Click OK to display IBM quote information.

For information about creating advanced interactive portlets from Web, XML, database, and JSP sources, see Chapter 2 of the *Enterprise Portal Developer's Guide*.

Starting and stopping the system

This section describes how to start and stop the Adaptive Server Anywhere database and the Tomcat application server.

Starting and stopping the database

This section describes how to start and stop the Adaptive Server Anywhere database.

From a Command Prompt window, navigate to the `%SYBASE%\infoedition` directory, and enter `startdb`, or double-click the file name in Windows Explorer.

This starts the Adaptive Server Anywhere database. You may see several “Ping server failed – Database server not found” messages. You can disregard these messages.

When the database starts, you see “Ping server successful,” and the icon for the Sybase ASA database appears in your taskbar.

❖ Shutting down the ASA database

- 1 Make sure Tomcat has been stopped.
- 2 Double-click the Adaptive Server Anywhere icon in the taskbar, then select Shutdown.
- 3 Close any open browser windows.

Alternatively, from a Command Prompt window, navigate to the `%SYBASE%\infoedition` installation directory and enter `stopdatabase`, or double-click the file name in Windows Explorer.

Starting and stopping Tomcat application server

This section describes how to start and stop the Tomcat application server. If you are running EP in EAServer, see the EAServer documentation for procedures to start and stop the application.

❖ Starting the Tomcat application server

- From a Command Prompt window, navigate to `%SYBASE%\infoedition`, and enter `starttomcat`, or double-click the file name in Windows Explorer.

When Tomcat starts, you see:

```
Starting service Tomcat-Standalone  
Apache Tomcat/4.1.29
```

Minimize the Tomcat window. Do not close the window.

❖ **Shutting down the Tomcat application server**

- From a command window, navigate to the `%SYBASE%\infoedition` installation directory, and enter `stoptomcat`, or double-click the file name in Windows Explorer.

Installing EP in EAServer 5.1

This appendix provides information for installing and configuring Enterprise Portal – Information Edition (EP) in an EAServer 5.1 environment.

Topic	Page
Overview	29
Installing EP 6.1 in EAServer	30
Configuring LDAP for EAServer	32
Uninstalling EP 6.1 from EAServer	32

Overview

This appendix describes how to install EP 6.1 in an EAServer environment instead of a Tomcat environment, and how to uninstall EP 6.1 from EAServer if necessary.

In this section, `%JAGUAR%` is defined as `%SYBASE%\EAServer`, and `%JAVA_HOME%` points to a valid JVM directory.

Installing EP 6.1 in EAServer

Install EAServer using the automated Install Shield package, and following the EAServer installation documentation. You can also install EAServer 5.0 first, and then update to EAServer 5.1. If you have problems or questions, see the EAServer installation documentation.

Note EP requires JDK 1.4.

Note See the *Enterprise Portal – Information Edition Release Bulletin* for information about EAServer patches or EBFs that must be installed.

❖ Installing EP in EAServer

- 1 Make sure EAServer is up and running before you proceed. Note the following assumptions

- Server name – must be “Jaguar”
- Default HTTP port – 8080
- Default HTTPS port – 8081

Note Currently, these port numbers are required.

- 2 Make sure that EAServer has been started with the correct JDK version (`%JAGUAR%\bin\serverstart -jdk14`), by checking the *Jaguar.log* for the following:

```
Jul 20 13:27:58 2004: 180389-Java virtual machine
initialized: javaversion 1.4.
2_03
```

```
Jul 20 13:27:58 2004: 180389-Java virtual machine
initialized: Java HotSpot(TM)
Client VM (version 1.4.2_03-b02, mixed mode)
```

- 3 Make sure no other Adaptive Server Anywhere instance is using port 4747.
- 4 From a Command Prompt window, make sure the `%JAGUAR%` and `%SYBASE%` environment variables are set. If not, set them; for example:

```
set JAGUAR=c:\Sybase\EAServer
```



```
set SYBASE=c:\Sybase
```

Note The `%SYBASE%` environment variable is set to the parent directory of `%JAGUAR%` if `%SYBASE%` is not set. You can also set `JAVA_HOME` to a JDK 1.4 installation, otherwise it will be set to the JDK 1.4 version that is used by EAServer.

- 5 Using a zip utility, locate *ep61EAS.zip* on the installation CD, and unzip its contents to `%SYBASE%`.
- 6 Optionally, you can set the `%JAGTOOLARGS%` environment variable, which is supported by the *setup.bat* file. For example, if you are using a non-default IIOP port in EAServer, you can set the environment to:

```
set JAGTOOLARGS=-n 9100
```

- 7 Go to `%SYBASE%\EP\scripts` and execute the following:

```
setup.bat sybase.com csi
```

Note The `csi` argument is required.

This installs and configures EP, including:

- Web components:
 - Onepage
 - DiscussionForum
 - InstantMessaging
 - PortalExplorer
 - CustView
- EAServer package:
 - csi-easerver

When the installation is complete, EAServer restarts, and Sybase ASA starts on port 4747.

- 8 Verify that EAserver re-started with the correct JDK version, by checking the *Jaguar.log* for the following:

```
Jul 20 13:27:58 2004: 180389-Java virtual machine  
initialized: javaversion 1.4.  
2_03
```

```
Jul 20 13:27:58 2004: 180389-Java virtual machine
initialized: Java HotSpot(TM)
Client VM (version 1.4.2_03-b02, mixed mode)
```

If not, then stop EAServer using standard procedures, and restart it using `%JAGUAR%\bin\serverstart -jdk14`.

- 9 Verify that Adaptive Server Anywhere started correctly.

Note Start and stop scripts for Sybase ASA are provided in the `%SYBASE%\EP` directory:

`startdb.bat` – starts the ASA portaldatabase on port 4747

`stopdatabase` – stops the ASA portaldatabase

- 10 Verify the EP installation by accessing Web Studio from a browser window and entering:

`http://HOSTNAME.PORTALDOMAIN:port/onepage/index.html`

For example:

`http://lab2k.syabse.com:8080/onepage/index.html`

See “Getting started with Portal Interface” on page 19 and “Getting started with Web Studio” on page 22 for information. Be sure to use port 8080 when running Enterprise Portal – Information Edition from EAServer.

Configuring LDAP for EAServer

Tomcat comes preconfigured with CSI and PortalDB provider. If you want to configure LDAP for EAServer, see Appendix B, “Setting Up Authentication and Authorization.” The instructions are the same as EAServer instructions used to configure the CSI files to use LDAP.

Uninstalling EP 6.1 from EAServer

If necessary, you can easily uninstall EP from EAServer.

❖ Removing EP from EAServer

- 1 Shut down the Sybase ASA database. In a Command Prompt window, enter:

```
stopdatabase
```

- 2 Optionally, set the `%JAGTOOLARGS%` environment variable, which is supported by the `uninstall.bat` file. For example, if you are using a non-default IIOP port in EAServer, you can set the environment to:

```
set JAGTOOLARGS=-n 9100
```

Then, update the related command in the `uninstall.bat` file:

- a Search for the line:

```
call "%JAGUAR%\bin\jagtool" delete
WebApplications:onepage
```

- b Change the line to:

```
call "%JAGUAR%\bin\jagtool" %JAGTOOLARGS%
delete WebApplications:onepage
```

- 3 Execute the `uninstall.bat` file, located in `%SYBASE%\EP\scripts`.

```
uninstall.bat
```

This removes the Web applications and EAServer package.

- 4 Manually delete the `%SYBASE%\EP` installation directory.
- 5 Delete the `x:\tmp` directory used for log files.
- 6 Manually remove the Web Studio roles that were created by `setup.bat`. Use EAServer Manager to remove the following roles:
 - PortalUser
 - PortalAdmin
 - PortalGuest
 - StudioAdmin
 - superuser
 - manager
- 7 Manually remove these files from `%JAGUAR%\EAServer\java\classes`:
 - `csi-core.jar`
 - `csi-ldap.jar`

- *csi-portaldb.jar*

Setting Up Authentication and Authorization

This chapter describes how to set up authentication and authorization for Enterprise Portal – Information Edition (EP) 6.1, using either Tomcat or EAServer, and either the portal database or a Lightweight Directory Access Protocol (LDAP) server.

Preconfigured for PortalDB This version of EP is preconfigured to support authentication and authorization using the PortalDB security provider. If you plan to use Tomcat and PortalDB, you need not perform any of the configuration steps described in this chapter.

Topic	Page
Overview	35
Configuring the CSI realm	36
Configuring the security provider	38

Overview

In this version of EP, a Common Security Infrastructure (CSI) realm works together with a security provider, either PortalDB or LDAP, to support authentication and authorization. The CSI realm is a component that plugs in to either a Tomcat 4.1 Web application container or an EAServer 5.1 application server. To support authentication and authorization, the PortalDB provider uses the Enterprise Portal database portaldatabase; the LDAP provider uses an LDAP server.

A CSI realm is an abstract interface to security information such as user names, passwords, and role membership. When a user logs in to Enterprise Portal, the user's name and password are verified against the data server, and if valid, role information is retrieved to provide Tomcat or EAServer with a list of the user's roles.

To use a combination of components other than Tomcat and the PortalDB security provider:

If your system components are	Perform these steps
Tomcat and the LDAP provider	<ul style="list-style-type: none">• Configure the LDAP provider
EAServer and the PortalDB provider	<ul style="list-style-type: none">• Configure the EAServer realm
EAServer and the LDAP provider	<ol style="list-style-type: none">1 Configure the EAServer realm2 Configure the LDAP provider

You can also use both security providers at the same time. If your system is configured to use both the LDAP provider and the PortalDB provider, a user's name and password are first passed to the LDAP provider for authentication, then they are passed to the PortalDB provider. If authentication succeeds with either provider, the user is authenticated. If the user cannot be authenticated with either the LDAP or PortalDB provider, the user is not authenticated. Similarly, when performing authorization role checks, both providers are queried to see whether either of them grants the specified role to the user.

Note For development, you may want to use the preconfigured PortalDB provider, as it can simplify debugging.

Configuring the CSI realm

Enterprise Portal supports authentication and authorization for both the Tomcat Web application container and the EAServer application server. This version of Enterprise Portal is preconfigured to use Tomcat. To use EAServer, see “Configure the EAServer realm” on page 37.

Configure the Tomcat realm

The Tomcat CSI realm plugs in to a Tomcat 4.1 Web application container. Its purpose is to delegate authentication and authorization checks to the security provider.

To enable debugging in the Tomcat CSI realm, create a file called *log4j.properties* in *%CATALINA_HOME%\server\classes*, where *CATALINA_HOME* represents the Tomcat root installation directory, and insert the following text:

```
# sample log4j.properties
# SecurityAppender for security packages only
log4j.appender.SecurityAppender=org.apache.log4j.DailyRollingFileAppender
log4j.appender.SecurityAppender.DatePattern='.'yyyy-MM-dd
log4j.appender.SecurityAppender.File=D:/ep61unwire/infoedition/tomcat/logs/
    security_debug.log
log4j.appender.SecurityAppender.layout=org.apache.log4j.PatternLayout
log4j.appender.SecurityAppender.layout.ConversionPattern=%d{ISO8601}
    %-5p %-25c{1} %x - %m%n
log4j.category.com.sybase.security=DEBUG, SecurityAppender

# make sure security messages stay in the security log
log4j.additivity.com.sybase.security=false

# other packages go to the root appender
log4j.appender.RootAppender=org.apache.log4j.ConsoleAppender
log4j.appender.RootAppender.layout=org.apache.log4j.PatternLayout
log4j.appender.RootAppender.layout.ConversionPattern=%d{ISO8601}
    %-5p %-25c{1} %x - %m%n
log4j.rootCategory=INFO, RootAppender
```

The debugging output is written to the file whose name and location are specified by the *log4j.appender.SecurityAppender.File* property; in the example above, *D:\ep61unwire\infoedition\tomcat\logs\security_debug.log*.

Initially, the Tomcat CSI realm is configured to use the PortalDB provider. To use the LDAP provider, see “Configure the LDAP provider” on page 39.

Configure the EAServer realm

The EAServer CSI realm plugs in to an EAServer application server. Its purpose is to delegate authentication and authorization checks to the security provider.

❖ Setting up the EAServer realm

- 1 To debug the CSI realm, create a file called *log4j.properties* in *%JAGUAR%\java\classes*, where *JAGUAR* is the EAServer installation directory, and insert the following text, which causes debug and log messages to be written to *%JAGUAR%\bin\Jaguar.log*:

```
log4j.appender.RootAppender=org.apache.log4j.ConsoleAppender
log4j.appender.RootAppender.layout=org.apache.log4j.PatternLayout
log4j.appender.RootAppender.layout.ConversionPattern=%d{ISO8601}
    %-5p %-25c{1} %x - %m%n
log4j.rootCategory=WARN, RootAppender
log4j.category.com.sybase.security=DEBUG
```

- 2 To use the PortalDB security provider only, skip to step 4.

If you are using the LDAP security provider, the EAServer CSI realm does not validate the LDAP provider's XML configuration file against the schema. To validate the XML configuration file:

- a Verify that the JVM supports Java API for XML Processing (JAXP) 1.2 or higher.
- b Configure the XML validation property:
 - 1 In EAServer Manager, expand the Servers folder, highlight Jaguar, and select File | Properties. The Server Properties dialog box displays.
 - 2 On the Advanced tab, click Add, then enter `com.sybase.security.core.XmlConfiguration.XmlValidation` as the property name and "true" as the property value.
Click OK.
- 3 Configure the security provider—see "Configuring the security provider" on page 38.
- 4 Restart EAServer. In EAServer Manager, highlight Jaguar, and select File | Shutdown and Start.

Configuring the security provider

Enterprise Portal includes two security providers, the PortalDB provider and the LDAP provider. Initially, Enterprise Portal is configured to use the PortalDB provider. You can use the LDAP provider instead of the PortalDB provider, or you can use both providers concurrently. To configure a security provider, see:

- "Configure the LDAP provider" below, or
- "Restore the PortalDB provider configuration" on page 46

Configure the LDAP provider

Enterprise Portal LDAP support includes authentication, attribution, and authorization services. The LDAP provider authenticates users when they log in using credentials that can be validated on the LDAP server.

- 1 To use both the LDAP provider and the PortalDB provider, go to step 2.

To use only the LDAP provider:

- a Change to the location of the *global.properties.xml* file, either:
 - Tomcat –
%SYBASE%\infoedition\tomcat\webapps\onepage\config, where SYBASE is the installation directory of your Sybase software, or
 - EAServer –
%JAGUAR%\Repository\WebApplication\onepage\config, where JAGUAR is the EAServer installation directory.
 - b Using a text editor, open *global.properties.xml*, and change the value of the AuthenticationUsing property to “CSI”.
- 2 Change to the location of the *csi.xml* file, either:
 - Tomcat – *%CATALINA_HOME%\conf*, where CATALINA_HOME represents the Tomcat root installation directory, or
 - EAServer – *%JAGUAR%\Repository\Component\csi-easerver*
 - 3 Using a text editor, open *csi.xml*, and edit the values appropriate for your system.

The sample *csi.xml* file that is installed with Enterprise Portal contains the following LDAP provider definitions, which are commented out. Remove the comment delimiters:

```
<!--
```

```
<config:authenticationProvider
  name="com.sybase.security.ldap.LDAPLoginModule"
  controlFlag="optional">

  <config:options name="ServerType" value="sunone5" />
  <config:options name="ProviderURL" value="ldap://localhost:389" />
  <config:options name="DefaultSearchBase" value="dc=sybase,dc=com" />
```

```
</config:authenticationProvider>
```

```
-->
```

```
<!-- LDAP attributer - commented out
```

```
  <config:provider name="com.sybase.security.ldap.LDAPAttributer"
    type="attributer" />
```

```
-->
```

- 4 Comment out the following PortalDBAttributer definition. To comment out the definition, insert “<!--” at the beginning of the definition, and “-->” at the end of the definition.

```
<config:provider name="com.sybase.security.portaldb.PortalDBAttributer"
  type="attributer" />
```

Table B-1 on page 40 defines the complete list of options that you can use to configure the authentication provider. You can enable any of the options by adding the option name and value to *csi.xml*, using the same syntax as illustrated in step 3. You must add new option definitions within the authenticationProvider definition; that is, between the following two lines:

```
<config:authenticationProvider
  name="com.sybase.security.ldap.LDAPLoginModule">
  ...
</config:authenticationProvider>
```

Table B-1: LDAP configuration options

Configuration option	Default value	Definition
AuthenticationFilter	Most LDAP servers: (&(uid={uid})) (objectclass=personal) Microsoft ActiveDirectory: (&(userPrincipalName={uid})) (objectclass=user))	The filter to use when authenticating users. When performing a user name/password-based authentication, this filter is used to determine the LDAP entry that matches the supplied user name. The string “{uid}” in the filter is replaced with the user name.
AuthenticationMethod	simple	The authentication method to use for all LDAP authentication requests. The supported methods are: <ul style="list-style-type: none"> • “simple” – clear text authentication. • “DIGEST-MD5” – more secure, hashed password authentication. Passwords must be stored in plain text on your LDAP server, and you must use JRE 1.4 or higher.

Configuration option	Default value	Definition
AuthenticationScope	onelevel	Can be set to either “onelevel” or “subtree.” If set to “onelevel,” only the AuthenticationSearchBase is searched used to search for user records; if set to “subtree,” the AuthenticationSearchBase and its subtree are searched.
AuthenticationSearchBase		The location of user records. If not specified, the DefaultSearchBase is used.
BindDN		The DN to bind to when creating the initial LDAP connection. This DN must identify a user who has read capability on all records that are accessed when users authenticate using the login module. This property also defines the credentials that are used to perform anonymous attribution operations when LDAP authentication has not occurred. If this property is not specified, anonymous binding is used, which works on most servers.
BindPassword		The password to bind to when creating the initial LDAP connection. You must specify this only when the BindDN property is specified.
DefaultSearchBase		The search base that is used if no other LDAP search base is specified for authentication, roles, or attribution. Use either of the following two syntax options, and verify that the syntax you choose matches what is configured on the LDAP server: <code>dc=<domain_name>,dc=<top_level_domain> o=<company_name>,c=<country_code></code> For a machine in the Sybase organization, the previous two syntax options map to: <code>dc=sybase,dc=com o=Sybase,c=us</code>
InitialContextFactory	com.sun.jndi.ldap.LdapCtxFactory	Specifies the JNDI provider to use. If you are using a Sun Java VM version 1.3 or higher, the default value should work. If you are using an IBM or other third-party VM, adjust this value accordingly.
ProviderURL	ldap://localhost:389	The URL to connect to the LDAP server. The default value should work if the LDAP server is located on the same machine as the portal and listens on port 389.

Configuration option	Default value	Definition
RoleFilter	<p>SunONE: (&(objectclass=ldapsubentry) (objectclass=nsroledefinition))</p> <p>Netscape Directory Server: ((objectclass=groupofnames) (objectclass=groupofuniquenames))</p> <p>Microsoft ActiveDirectory: ((objectclass=groupofnames) (objectclass=group))</p>	<p>The role filter, which when used with the RoleSearchBase and RoleScope, returns the complete list of roles from the LDAP server.</p>
RoleMemberAttributes	Netscape Directory Server: member,uniquemember	<p>A comma-delimited list of one or more role attributes that define the DN's for users who have the role. The DN's are used to determine which roles the user has. This property may be helpful if you use LDAP groups as placeholders for roles.</p> <p>Note The default value applies only to Netscape Directory Server; no default exists for other servers.</p>
RoleNameAttribute	cn	The attribute that identifies the common names of roles. If a role name value is "dn," the role name is assumed to be the full DN of the role.
RoleScope	onelevel	Can be set to either "onelevel" or "subtree." If set to "onelevel," only the RoleSearchBase is used to search for roles; if set to "subtree," the RoleSearchBase and its subtree are searched.
RoleSearchBase		The search base used to retrieve a list of roles. If not specified, the DefaultSearchBase is used.

Configuration option	Default value	Definition
ServerType		<p>The type of LDAP server you are connecting to; supported server types are:</p> <ul style="list-style-type: none"> • “msad2k” – Microsoft ActiveDirectory Windows 2000—see “Caveats when using Microsoft ActiveDirectory LDAP servers” on page 45. • “nsds4” – Netscape Directory Server 4. • “sunone5” – SunONE Directory Server 5. <p>This value is not required, but if provided, establishes default values for the following configuration properties:</p> <ul style="list-style-type: none"> • AuthenticationFilter • RoleFilter • RoleMembershipAttributes • UserRoleMembershipAttributes
UserFreeformRole MembershipAttributes		<p>The “free-form” role membership attribute list. Users who have attributes in this comma-delimited list are automatically granted access to roles whose names match the attribute value. For example, if the value of this property is “department” and the user’s LDAP record has the values “sales” and “consulting” for the department attribute, then the user will be granted roles whose names are “sales” and “consulting.”</p> <p>If you are using a SunONE Directory Server 5:</p> <ol style="list-style-type: none"> 1 From the LDAP Administration console’s Generic Editor, add a multivalue attribute called “department” for the user. 2 Highlight “department,” click Add Value, and enter “sales.” 3 Click Add Value again, and enter “consulting.”
UserRoleMembership Attributes	<p>SunONE: nsRoleDN</p> <p>Microsoft ActiveDirectory: memberOf</p>	<p>Defines a user attribute to store the list of role DN’s for all the roles a user has been granted. These role DN’s are cross-referenced against the roles retrieved using the RoleSearchBase and RoleFilter to get a complete list of a user’s roles.</p> <p>Note For servers other than SunONE and Microsoft ActiveDirectory, there is no default value.</p>

Role computation

Role computation techniques are used to list roles for both authenticated and unauthenticated users. The LDAP provider performs access control using roles, and supports three types of role constructs; each may be used independently, or all three may be used at the same time:

- User-level role attributes – this is the most efficient role definition format, and is supported by SunONE and ActiveDirectory. Using this technique, a user's roles are enumerated by a read-only attribute in the user's LDAP record, which is managed by a directory server. The advantages of this technique are the efficiency with which role memberships can be queried, and the ease with which they can be managed using the native LDAP server's management tools. To use this option, configure the following LDAP properties, which are described in Table B-1 on page 40:
 - RoleFilter
 - RoleNameAttribute
 - RoleSearchBase
 - RoleScope
 - UserRoleMembershipAttributes
- LDAP group role definitions – supported by almost all LDAP servers and a common construct in older LDAP servers. This technique may be useful if you want to use the same LDAP schema across multiple LDAP server types. Unlike the user-level role attributes, LDAP group memberships are stored and checked on a group-by-group basis. Each defined group has an attribute that lists all the members in the group. Groups are typically in one of two object classes, either groupofnames or groupofuniquenames.

To use this option, configure the following properties in the *csi.xml* file:

- RoleFilter
- RoleMemberAttributes
- RoleNameAttribute
- RoleScope
- RoleSearchBase

See Table B-1 on page 40 for more information. The value of `RoleMemberAttributes` is a comma-delimited list of attributes, each of which defines members of the group. An example value for this property is “`uniquemember,member,`” which represents the membership attributes in the `groupofnames` and `groupofuniquenames` object classes.

- Free-form role definitions – unique in that the role itself does not have an entry in the LDAP data store. To create a free-form role definition, begin by defining one or more user-level attributes. When roles are calculated for a user, the collective values of the attributes—which can have multiple values—are added as roles of which the user is a member. This technique requires less administrative overhead than either of the two previously described techniques.

As an example, assign a free-form role definition that is equivalent to the department number of a user. A role check performed on a specific department number is satisfied only by users who have the appropriate department number attribute value. To use free-form role definitions, configure the `UserFreeformRoleMembershipAttributes` property—see Table B-1 on page 40.

Caveats when using Microsoft ActiveDirectory LDAP servers

If you are using the Microsoft ActiveDirectory Windows 2000 server, the following restrictions apply:

- The DIGEST-MD5 authentication mode is not supported.
- The value of `DefaultSearchBase` must match exactly the value set for the directory server, including case.
- If you set the value of `DefaultSearchBase` to “`DC=epstg,DC=com,`” you must set the values of both `AuthenticationSearchBase` and `RoleSearchBase` to “`CN=Users,DC=epstg,DC=com.`”
- Anonymous binding is not permitted. You must specify a `BindDN/BindPassword` that identifies a user who can view all other users and groups; for example, specify “`mtester@epstg.com`” as the `BindDN` and “`secure123`” as the `BindPassword`.
- From the ActiveDirectory Users and Computers console, you must create users and groups, then add users to the groups so they are authorized to perform tasks in Enterprise Portal. Create the following groups, then add users to these groups:
 - everybody

- PortalAdmin
- PortalGuest
- PortalUser
- StudioAdmin
- superuser

Restore the PortalDB provider configuration

Initially, Enterprise Portal is configured to use the PortalDB security provider. If your system was changed to use the LDAP security provider, you can restore the PortalDB configuration using the following procedure.

- 1 Change to the location of the *global.properties.xml* file, either:
 - Tomcat – *%SYBASE%\infoedition\tomcat\webapps\onepage\config*, where SYBASE is the root installation directory of your Sybase software, or
 - EAServer – *%JAGUAR%\Repository\WebApplication\onepage\config*, where JAGUAR is the EAServer root installation directory.
- 2 Using a text editor, open *global.properties.xml*, and set the value of the AuthenticationUsing property to “Database”.
- 3 Change to the location of the *csi.xml* file, either:
 - Tomcat – *%CATALINA_HOME%\conf*, where CATALINA_HOME represents the Tomcat root installation directory, or
 - EAServer – *%JAGUAR%\Repository\Component\csi-easerver*
- 4 Open *csi.xml*, and verify that the PortalDB provider definitions are not commented out. The sample *csi.xml* file that is installed with Enterprise Portal contains the following PortalDB provider definitions:

```
<config:authenticationProvider
  name="com.sybase.security.portaldb.PortalDBLoginModule"
  controlFlag="optional">

  <config:options name="DatasourceName"
    value="java:comp/env/jdbc/portaldb" />

</config:authenticationProvider>
```



```
<config:provider name="com.sybase.security.portaldb.PortaldBAttributer"
  type="attributer" />
```

The value of `DatasourceName` defines the name that is passed to the `javax.naming.InitialContext().lookup(datasourceName)` method to retrieve a connection to the portal database. The default value is `"java:comp/env/jdbc/portaldb,"` and Enterprise Portal creates this JNDI name automatically during deployment. If the `DatasourceName` configuration option is missing, the default value is used.

- 5 To use the PortalDB provider only, comment out the LDAP provider definition in *csi.xml*. To comment out the definition, insert `<!--` at the beginning of the definition, and `-->` at the end of the definition. In the following example, the LDAP provider definition is commented out:

```
<!--
<authenticationProvider
name="com.sybase.security.ldap.LDAPLoginModule">
  <options name="ServerType" value="sunone5"/>
  <options name="DefaultSearchBase" value=""/>
  <options name="ProviderURL" value="ldap://localhost:389"/>
  <options name="AuthenticationMethod" value="simple"/>
  <options name="AuthenticationScope" value="subtree"/>
  <options name="AuthenticationSearchBase" value=""/>
  <options name="RoleScope" value="subtree"/>
  <options name="RoleSearchBase" value=""/>
</authenticationProvider>
-->
```

To use both the PortalDB provider and the LDAP provider, verify that neither of the provider definitions is commented out.

Index

Symbols

- #, beginning comment lines in properties file 37
- & (ampersand), boolean operator 40, 42
- < and > (angle brackets)
 - <!-- ... -->, XML comment delimiters 47
 - <? ... ?>, in XML processing instructions 47
- around XML tags 39
- | (vertical bar)
 - boolean operator 42

A

- ASA
 - admin user name (upgrade script prompt) 14
 - host name (upgrade script prompt) 14
 - port number (upgrade script prompt) 14
 - starting the database 26
 - stopping the database 26
- authentication and authorization, setting up 35
- authentication providers
 - LDAP 39
 - PortalDB 46
- AuthenticationFilter, LDAP configuration option 40
- AuthenticationMethod, LDAP configuration option 40
- AuthenticationScope, LDAP configuration option 41
- AuthenticationSearchBase, LDAP configuration option 41

B

- BindDN, LDAP configuration option 41
- BindPassword, LDAP configuration option 41

C

- CATALINA_HOME environment variable 37
- changed files, merging 16
- component
 - default values 4
- configuring
 - EAServer CSI realm 37
 - EP for your network environment
 - (*global.properties.xml*) 7, 11
 - EP for your network environment (*server.xml*) 11
 - LDAP security provider 39
 - PortalDB security provider 46
 - proxy server (*global.properties.xml*) 9
 - Tomcat CSI realm 36
- CSI realm
 - configuring 36
 - defined 35
- csi.xml*, security provider configuration file
 - LDAP provider definition 39
 - PortalDB provider definition 46
- csi-easerver, installation 31
- CustView, installation 31

D

- default values
 - all components 4
 - EAServer ports 30
- DefaultSearchBase, LDAP configuration option 41
- DiscussionForum, installation 31
- disk space requirements 4
- documentation
 - Enterprise Portal v
 - jConnect for JDBC vi

E

- EAServer
 - default ports 30
 - installing EP 6.0 in EAServer 29
 - uninstalling EP 6.1 from EAServer 32
- EAServer CSI realm
 - configuring 37
 - debugging 37
- Enterprise Portal
 - installing EP 6.1 5
 - installing EP 6.1 in EAServer 29
 - network protocol for 4
 - uninstalling EP 18
 - uninstalling EP 6.1 from EAServer 32
 - upgrading from EP 6.0 to 6.1 13
- environment variables
 - CATALINA_HOME 37
 - JAGUAR viii, 29, 37, 39
 - JAVA_HOME viii, 29
 - SYBASE viii, 39
 - TEMP 13
 - TMP 13

G

- global.properties.xml*
 - configuring a proxy server 9
 - configuring for the LDAP provider 39
 - configuring for the PortalDB provider 46
 - configuring for your network environment 7, 11

I

- InitialContextFactory, LDAP configuration option 41
- installation
 - administrator privileges, required 5
 - installing Enterprise Portal 5
- InstantMessaging, installation 31

J

- JAGUAR environment variable viii, 29, 37, 39
- JAVA_HOME environment variable viii, 29

L

- LDAP 35
- LDAP security provider
 - configuration options 40
 - csi.xml* configuration file 39
 - global.properties.xml* 39
 - role computation 44
 - setting up 39
 - XML configuration file, validating 38
- LDAP support, configuring 39
- Lightweight Directory Access Protocol. *See* LDAP

M

- member name 20
- merging changed files 16, 17
- Microsoft ActiveDirectory server, restrictions 45

O

- onepage
 - accessing Portal Interface 19
 - installation 31
 - verifying installation in EAServer 32
 - verifying installation in Tomcat 8
- operating system, requirements 4
- overview
 - authentication and authorization 35

P

- passwords
 - choosing 20
 - default values 4
- Portal Interface
 - getting started 19
 - logging in 19
- PortalDB security provider
 - configuring 46
 - defined 35
 - global.properties.xml* file 46
- PortalExplorer, installation 31
- pre-installation tasks 5

- pre-upgrade tasks
 - performing system backup 13
 - verifying a temporary directory exists 13
 - verifying ASA and Tomcat are running 13
 - verifying the SYBASE environment variable is set 13
 - verifying the TEMP environment variable is set 13
 - verifying the TMP environment variable is set 13
- ProviderURL, LDAP configuration option 41

R

- requirements
 - operating system 4
- role computation for LDAP 44
- RoleFilter, LDAP configuration option 42
- RoleMemberAttributes, LDAP configuration option 42
- RoleNameAttribute, LDAP configuration option 42
- RoleScope, LDAP configuration option 42
- RoleSearchBase, LDAP configuration option 42

S

- server.xml*
 - configuring for your network environment 11
- ServerType, LDAP configuration option 43
- setting up authentication and authorization 35
- starting
 - ASA database 26
 - Tomcat application server 26
- stopping
 - ASA database 26
 - Tomcat application server 27
- SYBASE environment variable viii, 39
- system backup, creating (pre-upgrade task) 13
- system requirements 3
 - disk space 3
 - network protocols 3
 - system release level 3

T

- TEMP environment variable 13
- TMP environment variable 13
- Tomcat
 - configured with CSI and PortalDB provider 12, 32
 - configuring LDAP 12, 32
 - host name (upgrade script prompt) 14
 - installation directory 37
 - port number (upgrade script prompt) 14
 - starting the application server 26
 - stopping the application server 27
- Tomcat CSI realm
 - configuring 36
 - debugging 37

U

- uninstalling
 - Enterprise Portal 18
 - EP from EAServer 32
- upgrade script
 - prompts 14
- upgrading EP 6.0 to 6.1 13
- user name
 - default values 4
- UserFreeformRoleMembershipAttributes, LDAP
 - configuration option 43
- UserRoleMembershipAttributes, LDAP configuration
 - option 43

W

- Web Studio
 - getting started 22
 - logging in 22

