Oracle® WebCenter Portal

Installation and Configuration Roadmap

11*g* Release 1 (11.1.1.6.0) for Windows

Welcome to Oracle WebCenter Portal!

Use this documentation roadmap to find instructions on how to install, upgrade, and/or patch Oracle WebCenter Portal, then perform the necessary configurations. In Figure 1, find the starting point that best describes your current environment, then click the graphic or use the links in Table 1 to jump to the Guide that you need.

Figure 1   Starting Points for WebCenter Portal Installation
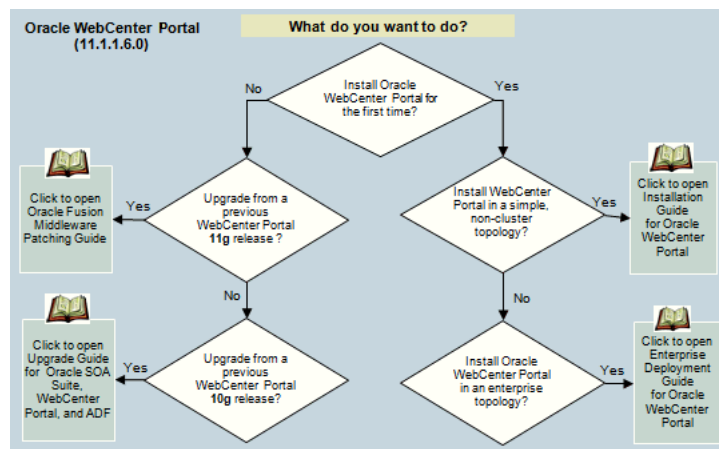
Table 1   Starting Points for WebCenter Portal Installation

Starting Point	Install Summary	Detailed Instructions
New WebCenter Portal Installation		
■ Install WebCenter Portal in a simple, non-clustered topology?	Roadmap	*Oracle Fusion Middleware Installation Guide for Oracle WebCenter Portal*
■ Install WebCenter Portal in an enterprise topology?	Roadmap	*Oracle Fusion Middleware Enterprise Deployment Guide for Oracle WebCenter Portal*
Existing WebCenter Portal Installation		
■ Upgrade from a previous 11g release to the current version?	Roadmaps	*Oracle Fusion Middleware Patching Guide*
■ Upgrade from a previous 10g release to the current version?	Roadmap	*Oracle Fusion Middleware Upgrade Guide for Oracle SOA Suite, WebCenter Portal, and ADF*

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Before you start, review the installation roadmap for your installation:

Installing WebCenter Portal for the First Time

- New Oracle WebCenter Portal Installations - Roadmaps
    - Installing Oracle WebCenter Portal for the First Time - Simple Topology
    - Installing Oracle WebCenter Portal for the First Time - Enterprise Topology
    - Post-install Configuration for WebCenter Portal Components and Services

Upgrading an Existing WebCenter Portal 11g Installation

- Existing Oracle WebCenter Portal 11g Installation - Roadmaps
    - Patching an Oracle WebCenter Portal 11.1.1.4.0 or 11.1.1.5.0 Installation
    - Patching an Oracle WebCenter Portal 11.1.1.2.0 or 11.1.1.3.0 Installation
    - Patching an Oracle WebCenter Portal 11.1.1.1.0 Installation

Upgrading an Existing WebCenter Portal 10g Installation

- Existing Oracle WebCenter Portal 10g Installation - Roadmap
    - Upgrading from Oracle WebCenter 10g 10.1.3

Note: For existing installations, note that upgrades may include new features that will need to be configured as described in the section on New Oracle WebCenter Portal Installations - Roadmaps.

New Oracle WebCenter Portal Installations - Roadmaps

The roadmaps in this section provide an overview of the steps required to install Oracle WebCenter Portal and guides you to the documentation. Oracle provides documentation for two installation scenarios:
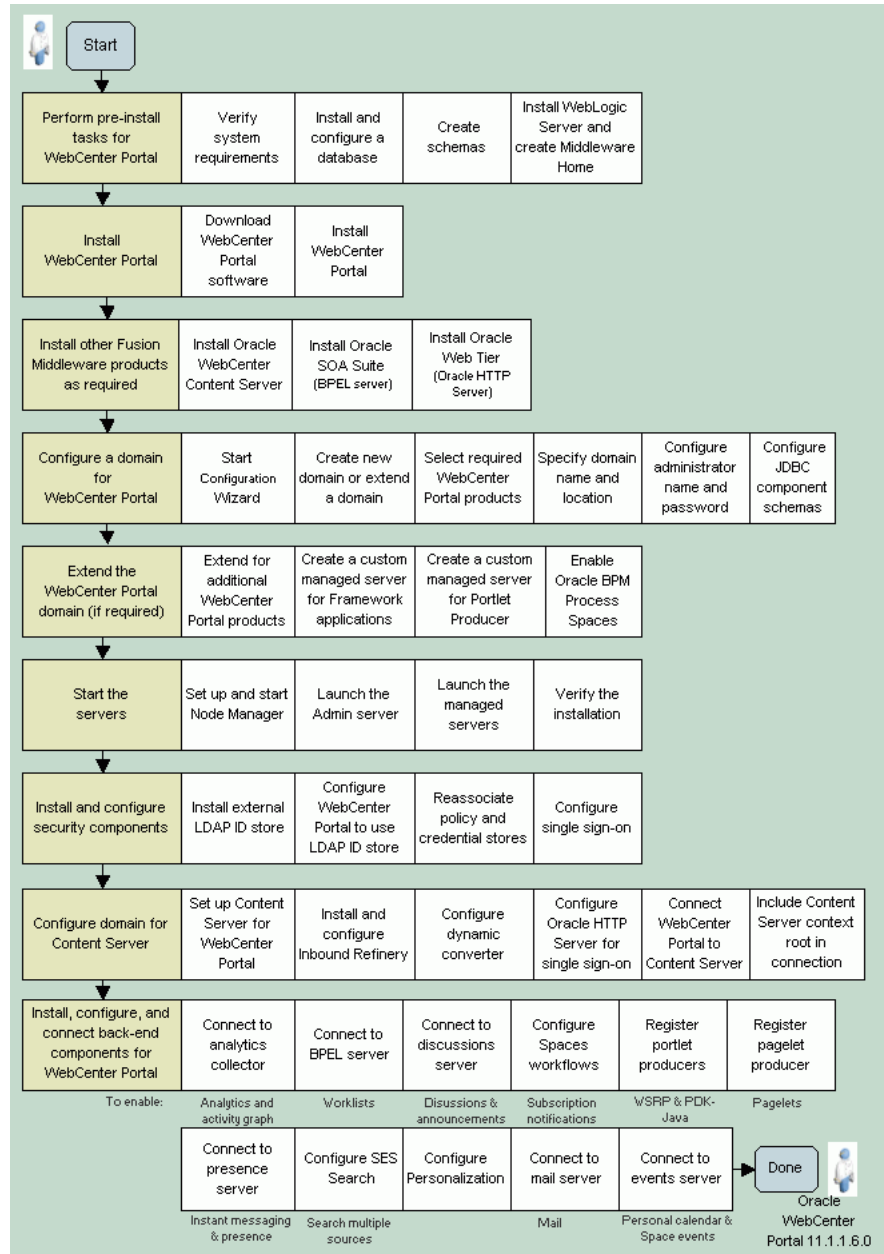
- **Simple topology** - install Oracle WebCenter Portal in a simple, non-clustered environment. Figure 2 illustrates the installation process for a simple topology.

- **Enterprise topology** - install Oracle WebCenter Portal in a distributed environment with built-in security and high availability. Figure 3 illustrates the installation process for an enterprise topology.

Figure 4 shows post-installation steps required to configure WebCenter Portal components and services that are required for both topologies. Click the flow charts for more information on how to complete each step.

Before you start, you might like to read:

- *Oracle Fusion Middleware Installation Planning Guide*

Figure 2   Installing Oracle WebCenter Portal for the First Time - Simple Topology

Start

Perform pre-install tasks for WebCenter Portal	Verify system requirements	Install and configure a database	Create schemas	Install WebLogic Server and create Middleware Home		
Install WebCenter Portal	Download WebCenter Portal software	Install WebCenter Portal				
Install other Fusion Middleware products as required	Install Oracle WebCenter Content Server	Install Oracle SOA Suite (BPEL server)	Install Oracle Web Tier (Oracle HTTP Server)			
Configure a domain for WebCenter Portal	Start Configuration Wizard	Create new domain or extend a domain	Select required WebCenter Portal products	Specify domain name and location	Configure administrator name and password	Configure JDBC component schemas
Extend the WebCenter Portal domain (if required)	Extend for additional WebCenter Portal products	Create a custom managed server for Framework applications	Create a custom managed server for Portlet Producer	Enable Oracle BPM Process Spaces		
Start the servers	Set up and start Node Manager	Launch the Admin server	Launch the managed servers	Verify the installation		
Install and configure security components	Install external LDAP ID store	Configure WebCenter Portal to use LDAP ID store	Reassociate policy and credential stores	Configure single sign-on		
Configure domain for Content Server	Set up Content Server for WebCenter Portal	Install and configure Inbound Refinery	Configure dynamic converter	Configure Oracle HTTP Server for single sign-on	Connect WebCenter Portal to Content Server	Include Content Server context root in connection

Install, configure, and connect back-end components for WebCenter Portal	Connect to analytics collector	Connect to BPEL server	Connect to discussions server	Configure Spaces workflows	Register portlet producers	Register pagelet producer
To enable:	Analytics and activity graph	Worklists	Disussions & announcements	Subscription notifications	WSRP & PDK-Java	Pagelets
	Connect to presence server	Configure SES Search	Configure Personalization	Connect to mail server	Connect to events server	Done
	Instant messaging & presence	Search multiple sources		Mail	Personal calendar & Space events	Oracle WebCenter Portal 11.1.1.6.0

Click the flow chart or use Table 2 to navigate to the appropriate Guide.
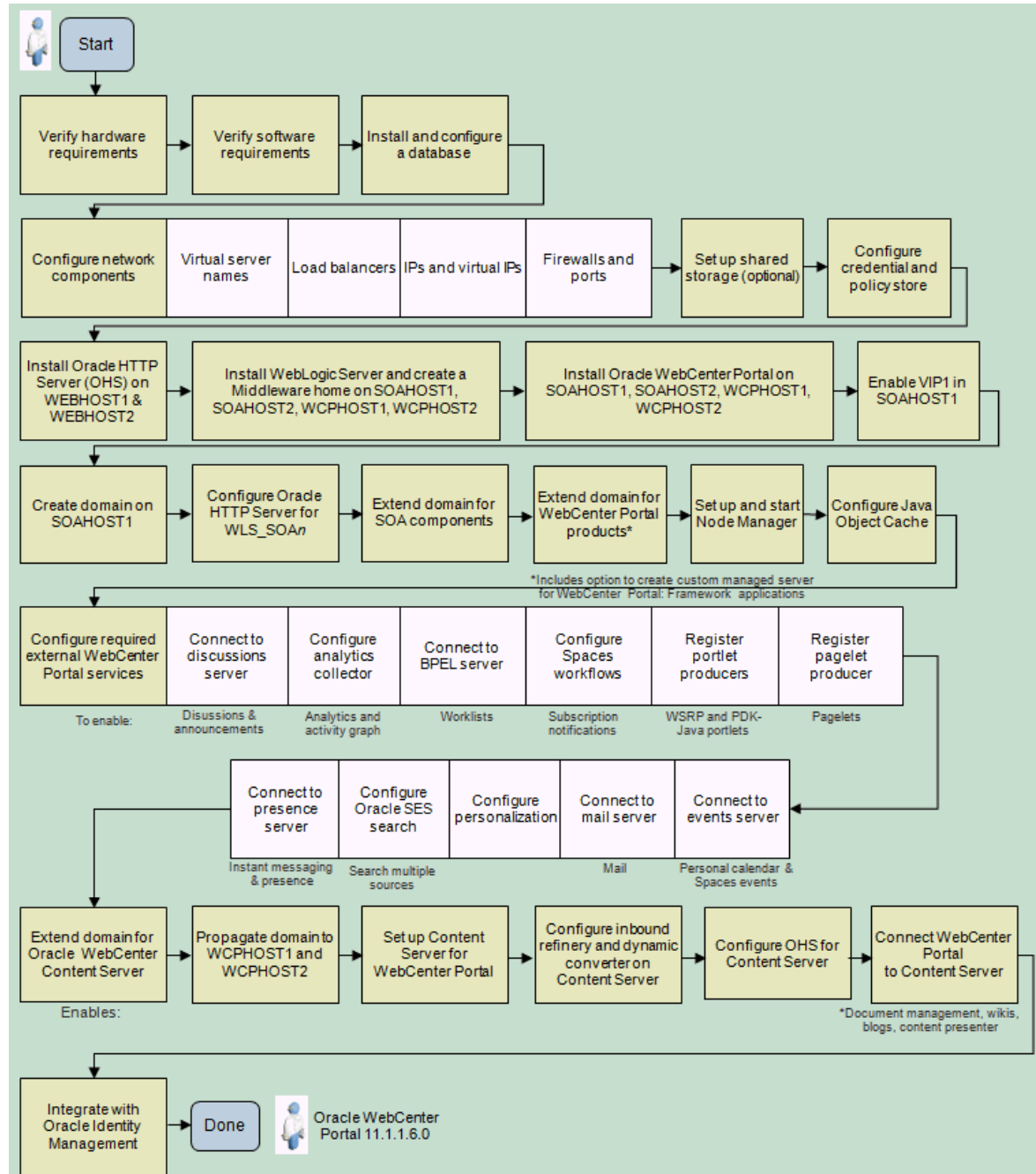
Table 2   Installing Oracle WebCenter Portal for the First Time - Simple Topology

Task and link to more information	Mandatory or Optional?	Notes
Perform pre-install tasks	Mandatory	
Verify system requirements, then install and configure a database	Mandatory	
Create schemas for the Spaces application Create schemas for WebCenter Portal applications	Mandatory	If you want to use Spaces as well as build WebCenter Portal applications you must run the RCU twice as both require their own WEBCENTER schema. Schemas for the Discussions service and portlets are also required if you plan to use those services. If you plan on using the Recommendation service, then the Activity Graph product needs to be installed. Analytics and Activity Graph can be used only by a single application within a domain. If Activity Graph is installed, the `ACTIVITIES` schema cannot be shared.
Install Oracle WebLogic Server	Mandatory	
Install Oracle WebCenter Portal: ■ Download WebCenter Portal software ■ Install WebCenter Portal products	Mandatory	
Install other Fusion Middleware products: ■ Oracle WebCenter Content ■ Oracle SOA Suite ■ Oracle Web Tier (Oracle HTTP Server)	Optional	SOA is mandatory for the Worklist service and Spaces workflows. Oracle WebCenter Content is mandatory for Content Presenter, wiki, and the Documents service. OHS is recommended for Oracle WebCenter Content Server integration and for single sign-on (SSO) since SSO is needed to stop multiple login prompts), and is required for REST and SOA.
Configure a domain for WebCenter Portal	Mandatory	You may choose to create a new domain or extend an existing domain for WebCenter Portal.
Extend the WebCenter Portal domain to: ■ Install additional WebCenter products ■ Create a custom managed server for Framework applications ■ Create a custom managed server for Portlet Producer applications ■ Enable Oracle BPM Process Spaces	Optional	Oracle does not recommend deploying WebCenter Portal applications or WebCenter Portal Producer applications to the Administration Server or any of the default managed servers created during Oracle WebCenter Portal installation.

Table 2   (Cont.) Installing Oracle WebCenter Portal for the First Time - Simple Topology

Task and link to more information	Mandatory or Optional?	Notes
Start the servers: ■ Start the Administration Server ■ Set up and start the Node Manager ■ Start managed servers ■ Verify the installation	Mandatory	
Install and configure external LDAP ID store	Mandatory	Mandatory for Oracle WebCenter Content Server and Discussions
Configure the domain for Oracle WebCenter Content Server	Optional	Mandatory for Content Presenter, wiki and the Documents service.
Install, configure, and connect back-end components for WebCenter Portal services: ■ Connect to analytics collector ■ Connect to BPEL server ■ Connect to discussion server ■ Configure Spaces workflows ■ Register portlet producers ■ Register pagelet producer ■ Connect to presence server ■ Configure SES Search ■ Configure personalization ■ Connect to mail server ■ Connect to events server	Optional	Mandatory for the WebCenter Portal services you want to use See also, Post-install Configuration for WebCenter Portal Components and Services

Figure 3   Installing Oracle WebCenter Portal for the First Time - Enterprise Topology

Click the flow chart or use Table 3 to navigate to the appropriate Guide.

Table 3   Installing Oracle WebCenter Portal for the First Time - Enterprise Topology

Task and link to more information	Mandatory or Optional?	Notes
Verify hardware requirements	Mandatory	
Verify software requirements	Mandatory	
Install and configure a database	Mandatory	

Table 3   (Cont.) Installing Oracle WebCenter Portal for the First Time - Enterprise

Task and link to more information	Mandatory or Optional?	Notes
Configure network components	Mandatory	
Set up shared storage	Optional	
Configure credential and policy store	Mandatory	
Install Oracle HTTP Server (OHS)	Mandatory	
Install WebLogic Server and create a Middleware home	Mandatory	
Install Oracle WebCenter Portal	Mandatory	
Enable VIP1	Mandatory	
Create domain	Mandatory	
Configure Oracle HTTP Server	Mandatory	
Extend domain for SOA components	Optional	
Extend domain for WebCenter Portal components	Mandatory	Option to configure the domain for the Spaces application or create a custom managed server for WebCenter Portal applications
Set up Node Manager	Mandatory	
Configure Java Object Cache	Mandatory	
Install and configure back-end components for required WebCenter Portal services: ■ Connect to analytics collector ■ Connect to BPEL server ■ Connect to discussion server ■ Configure Spaces workflows ■ Register portlet producers ■ Register pagelet producer ■ Connect to presence server ■ Configure SES Search ■ Configure personalization ■ Connect to mail server ■ Connect to events server	Optional	Mandatory for the WebCenter Portal services you want to use See also, Post-install Configuration for WebCenter Portal Components and Services
Extend domain for Oracle WebCenter Content Server	Optional	Mandatory for the Spaces application
Propagate domain to WebCenter Portal host		
Set up Content Server for WebCenter Portal		
Configure OHS for Content Server		
Connect WebCenter Portal to Content Server		
Integrate with Oracle Identity Management	Mandatory	

Figure 4   Post-install Configuration for WebCenter Portal Components and Services

Get the Spaces application working	Start WC_Spaces	Verify installation	Configure application settings	Connect to backend servers	Configure workflows	Restart the Spaces managed server	
Get Documents service working	Install content repository	Complete prerequsiste configuration	Connect to content repository	Restart the Spaces managed server			
Get Activity Stream working	Complete all the Content Server set up steps required by the Document service						
Get Discussion / Announcement service working	Start WC_Collabor ation	Verify installation	Configure WS-Security	Configure cluster support HA	Connect to discussion server	Restart the Spaces managed server	
Get portlet producers working	Start WC_Portlet	Verify installation	Configure WS-Security	Register portlet producers	HA - Indicates specific configuration for a cluster		
Get pagelet producers working	Start WC_Portlet	Verify installation	Register pagelet producer				
Get Analytics service working	Start WC_Utilities	Configure analytics collector	Connect to analytics collector	Restart the Spaces managed server			
Get Activity Graph service working	Enable one activity graph engine only HA	Start WC_Utilities	Verify installation	Connect to analytics collector	Restart the Spaces managed server	Run activity graph engine	
Get Personalizations working	Start WC_Utilities	Verify installation	Configure personalization	Restart the Spaces managed server			
Get IMP service working	Install presence server	Complete prerequsiste configuration	Connect to presence server	Restart the Spaces managed server			
Get Event service working	Install events server	Complete prerequsiste configuration	Connect to events server	Restart the Spaces managed server			
Get Mail service working	Install mail server	Complete prerequsiste configuration	Configure mail server connection	Restart the Spaces managed server			
Get Search service working	Install Oracle SES	Complete prerequsiste configuration	Set search options	Connect to Oracle SES	Restart the Spaces managed server		
Get Worklist service working	Install SOA Suite	Complete prerequsiste configuration	Connect to BPEL server	Restart the Spaces managed server			
Get RSS and Activity Stream working	Set up proxy server						
Get REST working	Configure credential store	Configure identity asserter	Set up proxy server				
Get Subscriptions & Notifications working	Specify channel for messages	If using mail, set shared credentials	If using BPEL, configure UMS				

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Click the flow chart or use Table 4 to navigate to the appropriate Guide.

Table 4   Getting WebCenter Portal Components and Services Working

WebCenter Portal Component/Service	Feature	Documentation
Spaces application		Get Spaces up and running
Documents service	Document management, wikis, blogs, content presenter	Connect to content repository
Activity Stream service	Activity streaming	Requires Oracle WebCenter Content Server to be set up for the Document service
Discussions and Announcement services	Discussion forums and announcements	Connect to discussion server In a clustered environment, additional configuration is required. More
Portlet producers	WSRP, PDK-Java portlets	Register portlet producers
Pagelet producers	Pagelets	Register pagelet producer
Analytics service	Analytics reports	Connect to analytics collector
Activity Graph service	Recommendation and similar item task flows	Connect to analytics collector In a clustered environment, the activity graph engine must be be targeted to a single managed server (not the cluster). More
Personalization service	Personalization scenarios	Configure personalization
Instant Messaging and Presence service	Presence status, other presence options (such as send mail, send instant message, start phone conference)	Connect to presence server
Event service	Personal calendar and Space event management	Connect to events server
Mail service	Mail task flow	Connect to mail server
Search service	Search task flows	Configure SES Search
Worklist service	Worklist task flows	Connect to BPEL server
RSS News Feeds	External RSS news feeds	Configure proxy for RSS
REST services	RESTful interface to WebCenter Portal services	Configure REST
Subscriptions and Notifications	Notifications about subscribed services and objects	Configure notifications

Existing Oracle WebCenter Portal 11g Installation - Roadmaps

The roadmaps in this section provide an overview of the steps required to apply the latest Oracle WebCenter Portal patch (11.1.1.6.0) and guides you to the documentation. Oracle provides documentation for the following installation scenarios:

- Patching an Oracle WebCenter Portal 11.1.1.4.0 or 11.1.1.5.0 Installation
- Patching an Oracle WebCenter Portal 11.1.1.2.0 or 11.1.1.3.0 Installation
- Patching an Oracle WebCenter Portal 11.1.1.1.0 Installation

Before you start, you may also like to read:

- *Oracle Fusion Middleware Installation Planning Guide*

Patching an Oracle WebCenter Portal 11.1.1.4.0 or 11.1.1.5.0 Installation

Figure 5 illustrates the steps required to update an Oracle WebCenter Portal 11g (11.1.1.4.0 or 11.1.1.5.0) installation to 11.1.1.6.0. Click the flow chart or use Table 5 to navigate to information for each step.

Figure 5   Applying the Latest Patch to Oracle WebCenter Portal 11.1.1.4.0 or 11.1.1.5.0
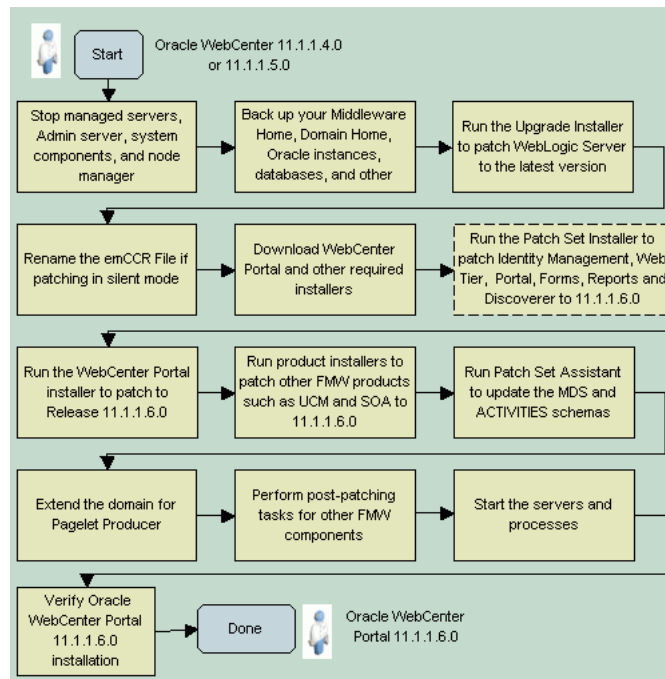
Table 5   Applying the Latest Patch to Oracle WebCenter Portal 11.1.1.4.0 or 11.1.1.5.0

Task and link to more information	Mandatory or Optional?	Notes
Stop managed servers, Admin server, system components, & node manager	Mandatory	
Back up your current WebCenter Portal environment	Mandatory	
Patch WebLogic Server to the latest version	Mandatory	
Rename the emCCR File for Silent Patching	Mandatory	
Download the installer for WebCenter Portal and other required products	Mandatory	

Table 5   (Cont.) Applying the Latest Patch to Oracle WebCenter Portal 11.1.1.4.0 or

Task and link to more information	Mandatory or Optional?	Notes
Run Patch Set Installer to patch the following Fusion Middleware products to 11.1.1.6.0: ■ Oracle Identity Management ■ Oracle Web Tier (Oracle HTTP server) ■ Oracle Portal, Forms, Reports and Discoverer	Optional	Mandatory for the products you have installed Oracle HTTP server is recommended for OCS integration
Run the WebCenter Portal installer to patch Oracle WebCenter Portal to 11.1.1.6.0	Mandatory	
Run product installers to patch other Fusion Middleware products to 11.1.1.6.0, such as: ■ Oracle WebCenter Content (previously Enterprise Content Management ECM) ■ Oracle SOA Suite	Mandatory	SOA is mandatory for the Worklist service and Spaces Workflows. Oracle WebCenter Content is mandatory for Content Presenter, and is recommended for the Documents service. OHS is recommended for Oracle WebCenter Content Server integration and for SSO (since SSO is needed to stop multiple login prompts), and is required for REST and SOA.
Update the MDS and `ACTIVITIES` schemas	Mandatory	
Extend the domain for Pagelet Producer	Optional	
Perform post-patching tasks for other FMW components	Mandatory	
Start the servers and processes	Mandatory	
Verify Oracle WebCenter Portal 11.1.1.6.0	Mandatory	

Patching an Oracle WebCenter Portal 11.1.1.2.0 or 11.1.1.3.0 Installation

Figure 6 illustrates the steps required to update an Oracle WebCenter Portal 11g (11.1.1.2.0 or 11.1.1.3.0) installation to 11.1.1.6.0. Click the flow chart or use Table 6 to navigate to information for each step.

Figure 6   Applying the Latest Patch to Oracle WebCenter Portal 11g (11.1.1.2.0 or 11.1.1.3.0)
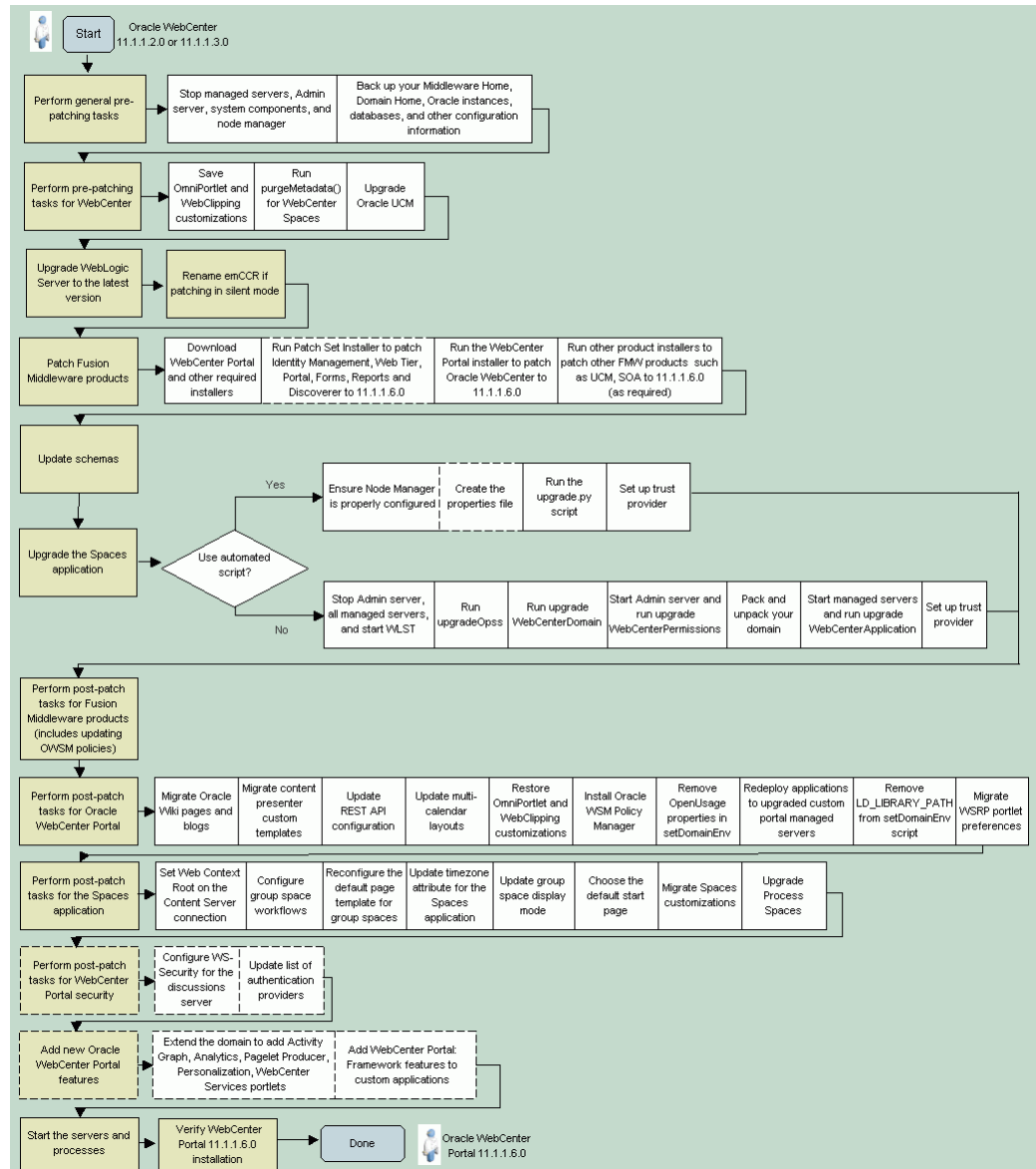
Click the flow chart or use Table 6 to navigate to the appropriate Guide.

Table 6   Applying the Latest Patch to Oracle WebCenter Portal 11g (11.1.1.2.0 or 11.1.1.3.0)

Task and link to more information	Mandatory or Optional?	Notes
Stop managed servers, Admin server, system components, & node manager	Mandatory	
Back up your current WebCenter Portal environment	Mandatory	
Perform pre-patch tasks for WebCenter Portal: ■ Save OmniPortlet and WebClipping customizations ■ Run purgeMetadata() for Spaces ■ Upgrade Oracle UCM10g	Mandatory	
Patch WebLogic Server to the latest version	Mandatory	
Rename the emCCR File if patching in the silent mode	Mandatory	
Download the installer for WebCenter Portal and other required products	Mandatory	
Run Patch Set Installer to patch the following Fusion Middleware products to 11.1.1.6.0: ■ Oracle Identity Management ■ Oracle Web Tier (Oracle HTTP Server) ■ Oracle Portal, Forms, Reports and Discoverer	Optional	Mandatory for the products you have installed Oracle HTTP server is recommended for OCS integration
Run WebCenter Portal installer to patch Oracle WebCenter Portal to 11.1.1.6.0	Mandatory	
Run product installers to patch other Fusion Middleware products to 11.1.1.6.0, including: ■ Oracle WebCenter Content (previously Enterprise Content Management ECM) ■ Oracle SOA Suite	Optional	WebCenter Content and SOA are mandatory for Spaces OHS is recommended for Oracle WebCenter Content Server integration
Update schemas	Mandatory	
Update the Spaces application using one of the following: ■ Node Manager and Automated Script ■ WLST commands	Mandatory	
Perform post-patch tasks for the required Fusion Middleware products. This includes updating the OWSM policies.	Mandatory	
Perform post-patch tasks for Oracle WebCenter Portal	Mandatory	
Perform post-patch tasks for Spaces	Mandatory	Mandatory for Spaces
Perform post-patch tasks for WebCenter Portal security	Optional	

Table 6   (Cont.) Applying the Latest Patch to Oracle WebCenter Portal 11g (11.1.1.2.0 or 11.1.1.3.0)

Task and link to more information	Mandatory or Optional?	Notes
Add new Oracle WebCenter Portal features	Optional	
Start the servers and processes	Mandatory	
Verify Oracle WebCenter Portal 11.1.1.6.0	Mandatory	

Patching an Oracle WebCenter Portal 11.1.1.1.0 Installation

If you are currently running Oracle WebCenter Portal 11g (11.1.1.1.0), you must update your Oracle Fusion Middleware environment to 11g (11.1.1.2.0) before applying the Oracle WebCenter Portal 11g (11.1.1.6.0) patch. Figure 7 illustrates the steps required.

Click the flow chart for more information on how to complete each step.

Figure 7   Applying the Latest Patch to Oracle WebCenter Portal 11.1.1.1.0
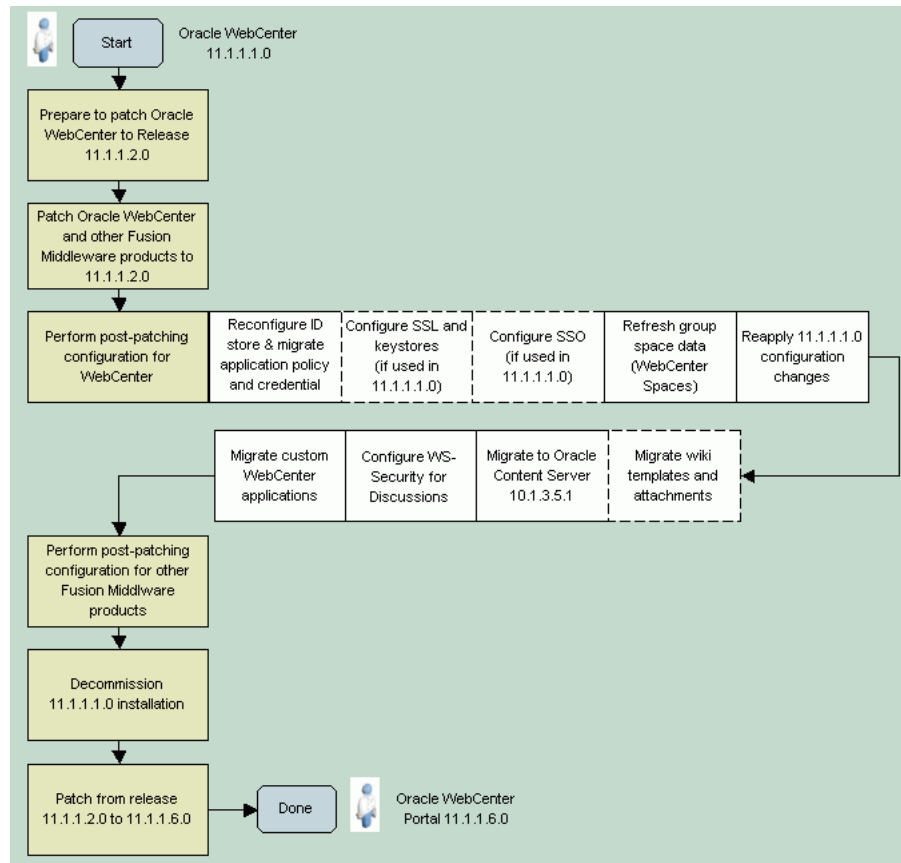
Click the flow chart or use Table 7 to navigate to the appropriate Guide.

Table 7   Applying the Latest Patch to Oracle WebCenter Portal 11.1.1.1.0

Task and link to more information	Mandatory or Optional?	Notes
Prepare to patch Oracle WebCenter Portal to Release 11.1.1.2.0	Mandatory	
Patch Fusion Middleware products and Oracle WebCenter Portal to 11.1.1.2.0	Mandatory	
Perform post-migration configuration for Oracle WebCenter Portal	Mandatory	
Reconfigure ID store & migrate application policy and credential store	Mandatory	
Configure SSL and keystore	Optional	Only if used in 11.1.1.1.0
Configure SSO	Optional	Only if used in 11.1.1.1.0
Refresh group space data	Mandatory	Spaces only
Apply 11.1.1.1.0 configuration changes	Mandatory	
Migrate custom WebCenter Portal applications	Mandatory	
Configure WS-Security for Discussions	Mandatory	Spaces only
Migrate to Oracle Content Server 10.1.3.5.1	Mandatory	
Migrate wiki templates and attachments	Optional	
Perform post-migration configuration for other FMW components	Mandatory	
Decommission 11.1.1.1.0 installation	Mandatory	
Patch 11.1.1.2.0 to 11.1.1.6.0	Mandatory	

Existing Oracle WebCenter Portal 10g Installation - Roadmap

If you are currently running Oracle WebCenter 10g (10.1.3) you must upgrade your Oracle Application Server 10g environment to Oracle Fusion Middleware 11g, and then upgrade your WebCenter Portal applications from 10g (10.1.3) to 11g (11.1.1.6.0). Figure 8 illustrates the steps required.

 Click the flow chart for more information on how to complete each step.

Before you start, you may also like to read:

- *Oracle Fusion Middleware Upgrade Planning Guide*

- *Oracle Fusion Middleware Installation Planning Guide*

- *Oracle Fusion Middleware Repository Creation Utility User's Guide*

- *Oracle Fusion Middleware Concepts*

Figure 8   Upgrading from Oracle WebCenter 10g 10.1.3
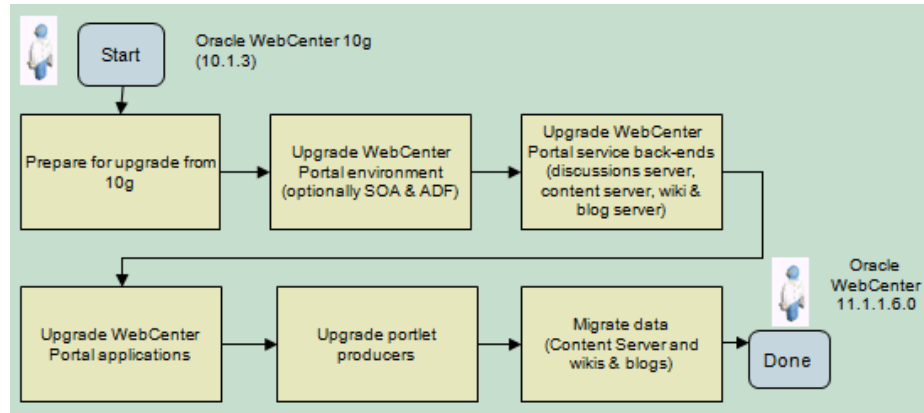
Click the flow chart or use Table 8 to navigate to the appropriate Guide.

Table 8   Upgrading from Oracle WebCenter 10g 10.1.3

Task and link to more information	Mandatory or Optional?	Notes
Prepare for upgrade from 10g	Mandatory	
Upgrade WebCenter Portal environment	Mandatory	Optionally upgrade SOA & ADF
Upgrade WebCenter Portal service back-ends (Discussions, OCS, Wiki & Blog Server)	Mandatory	Only mandatory for services that you use
Upgrade WebCenter Portal applications		
Upgrade portlet producers		
Migrate data on Oracle Content DB and Oracle Wiki and Blog server		

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