# Oracle® WebCenter Portal

Installation and Configuration Roadmap

11*g* Release 1 (11.1.1.7.0)  for Windows

**E22628-03**

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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 use the links in Table 1 to jump to the Guide that you need.

*Figure 1   Starting Points for WebCenter Portal Installation*
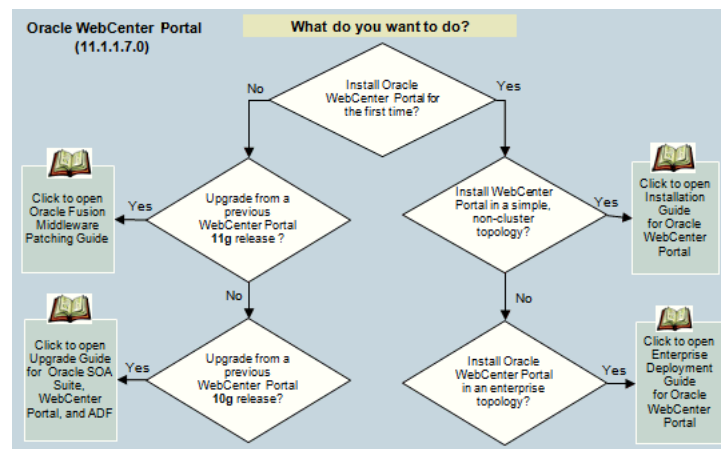


*Table 1   Starting Points for WebCenter Portal Installation*

| 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

**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:
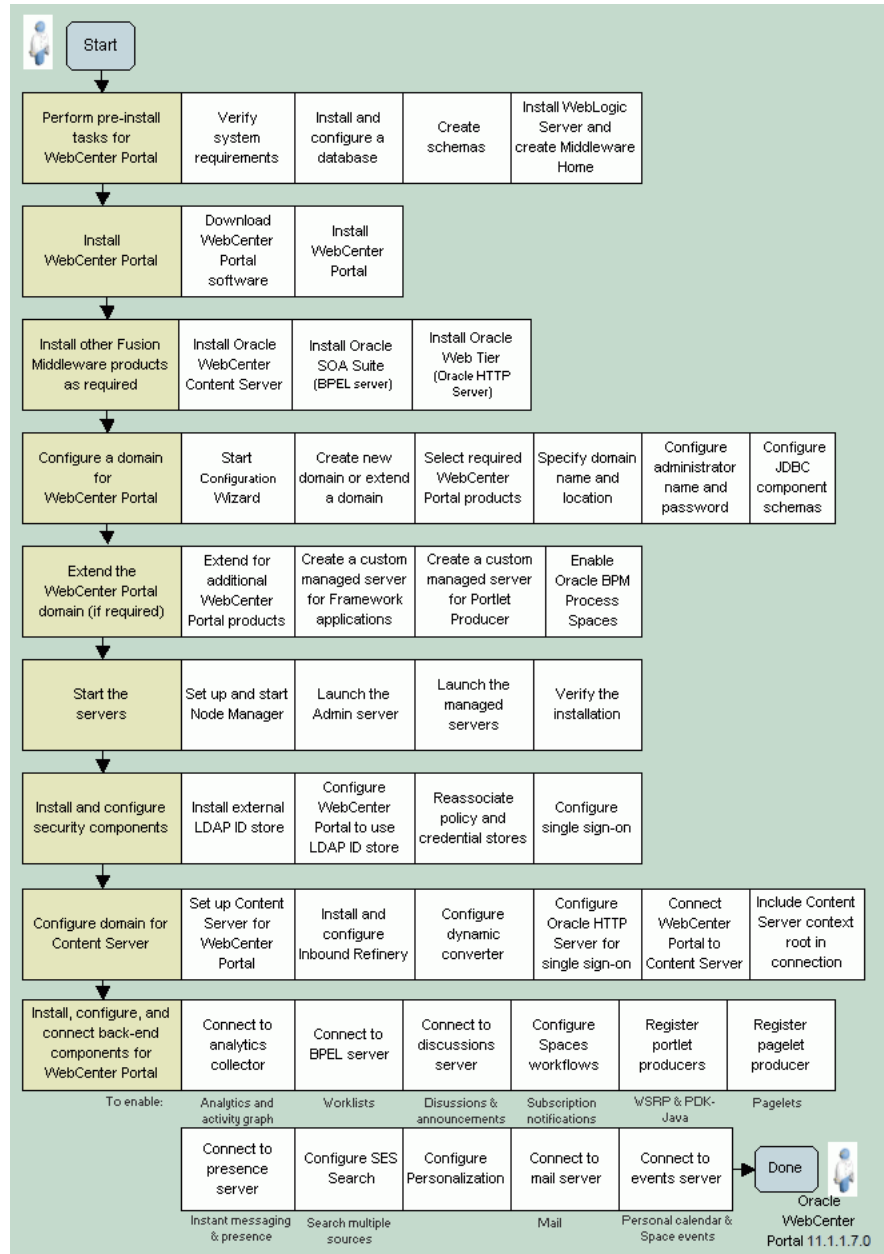
- **Simple topology** - install Oracle WebCenter Portal in a simple, non-clustered environment. Figure 2 illustrates the installation process for a simple topology. Use Table 2 to navigate to the appropriate Guide.

- **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. Use Table 3 to navigate to the appropriate Guide.

Figure 4 shows post-installation steps required to configure WebCenter Portal components and services that are required for both topologies. Use Table 4 to navigate to the appropriate Guide.

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**
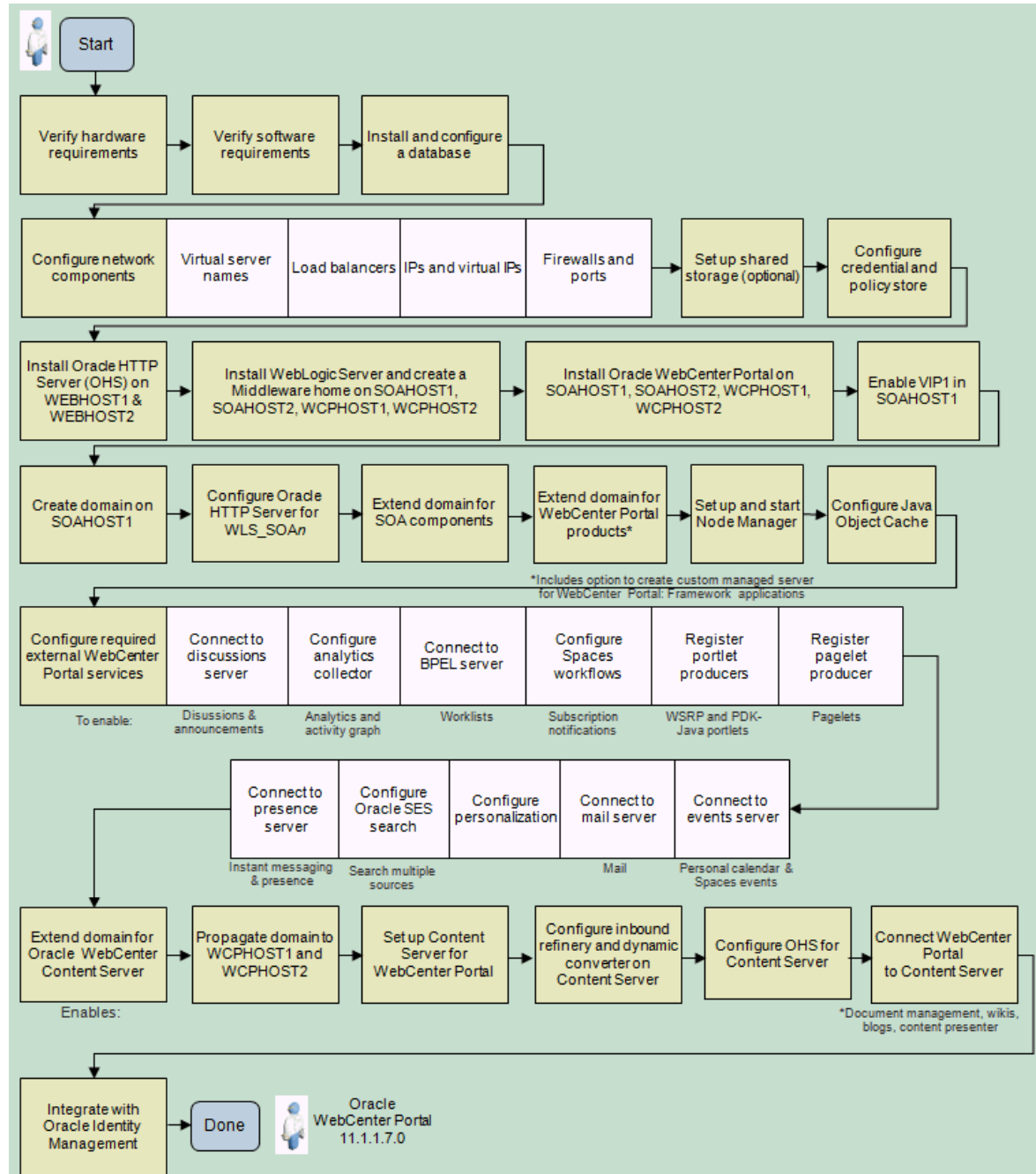


Use Table 2 to navigate to the appropriate Guide.

*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<br><br>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.<br><br>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:<br>■    Download WebCenter Portal software<br>■    Install WebCenter Portal products | Mandatory | |
| Install other Fusion Middleware products:<br>■    Oracle WebCenter Content<br>■    Oracle SOA Suite<br>■    Oracle Web Tier (Oracle HTTP Server) | Optional | SOA is mandatory for the Worklist service and Spaces workflows.<br><br>Oracle WebCenter Content is mandatory for Content Presenter, wiki, and the Documents service.<br><br>Oracle HTTP Server (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:<br>■    Install additional WebCenter products<br>■    Create a custom managed server for Framework applications<br>■    Create a custom managed server for Portlet Producer applications<br>■    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:<br><br>■  Start the Administration Server<br><br>■  Set up and start the Node Manager<br><br>■  Start managed servers<br><br>■  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:<br><br>■  Connect to analytics collector<br><br>■  Connect to BPEL server<br><br>■  Connect to discussion server<br><br>■  Configure Spaces workflows<br><br>■  Register portlet producers<br><br>■  Register pagelet producer<br><br>■  Connect to presence server<br><br>■  Configure SES Search<br><br>■  Configure personalization<br><br>■  Connect to mail server<br><br>■  Connect to events server | Optional | Mandatory for the WebCenter Portal services you want to use<br><br>See also, Post-install Configuration for WebCenter Portal Components and Services |

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



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:<br><br>■　Connect to analytics collector<br>■　Connect to BPEL server<br>■　Connect to discussion server<br>■　Configure Spaces workflows<br>■　Register portlet producers<br>■　Register pagelet producer<br>■　Connect to presence server<br>■　Configure SES Search<br>■　Configure personalization<br>■　Connect to mail server<br>■　Connect to events server | Optional | Mandatory for the WebCenter Portal services you want to use<br><br>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 | Optional | Mandatory for the Spaces application |
| Set up Content Server for WebCenter Portal | Optional | Mandatory for the Spaces application |

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

| Task and link to more information | Mandatory or Optional? | Notes |
| --- | --- | --- |
| Configure OHS for Content Server | Optional | Mandatory for the Spaces application |
| Connect WebCenter Portal to Content Server | Optional | Mandatory for the Spaces application |
| 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 prerequisiste 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_Collaboration | 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 | | | |
| 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 prerequisiste configuration | Connect to presence server | Restart the Spaces managed server | | | |
| Get Event service working | Install events server | Complete prerequisiste configuration | Connect to events server | Restart the Spaces managed server | | | |
| Get Mail service working | Install mail server | Complete prerequisiste configuration | Configure mail server connection | Restart the Spaces managed server | | | |
| Get Search service working | Install Oracle SES | Complete prerequisiste configuration | Set search options | Connect to Oracle SES | Restart the Spaces managed server | | |
| Get Worklist service working | Install SOA Suite | Complete prerequisiste 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 | | | | |

HA - Indicates specific configuration for a cluster

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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 <br><br>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 <br><br>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

Table 5 lists the Oracle WebCenter Portal installation scenarios that you can patch to the latest release 11.1.1.7.0, and guides you to the documentation in *Oracle Fusion Middleware Patching Guide*.

**Table 5    Applying the Latest Patch to Oracle WebCenter Portal 11g Installations**

| Starting Point | Documentation Link in Oracle Fusion Middleware Patching Guide |
| --- | --- |
| Oracle WebCenter Portal 11.1.1.6.0 Installation | See section "Patching an Oracle WebCenter Portal 11.1.1.6.0 Installation" |
| Oracle WebCenter Portal 11.1.1.4.0 or 11.1.1.5.0 Installation | See section "Patching an Oracle WebCenter 11.1.1.4.0 or 11.1.1.5.0 Installation" |
| Oracle WebCenter Portal 11.1.1.2.0 or 11.1.1.3.0 Installation | See section "Patching an Oracle WebCenter 11.1.1.2.0 or 11.1.1.3.0 Installation" |
| Oracle WebCenter Portal 11.1.1.1.0 Installation | See section "Patching an Oracle WebCenter 11.1.1.1.0 Installation" |

Before you start, you may also like to read *Oracle Fusion Middleware Installation Planning Guide*.

## 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 (11.1.1.7.0). Figure 5 illustrates the steps required. Use Table 6 to navigate to the appropriate Guide.

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 5    Upgrading from Oracle WebCenter 10g 10.1.3**
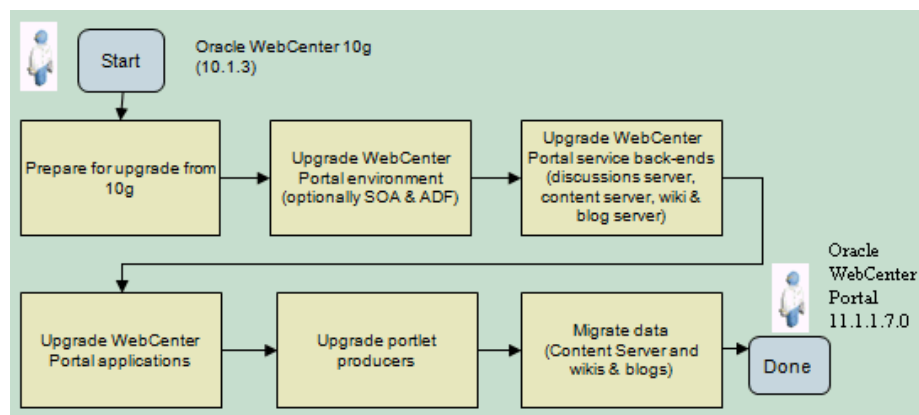


Use Table 6 to navigate to the appropriate Guide.

***Table 6    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 | Upgrade ADF. Also upgrade SOA if installed |
| Upgrade WebCenter Portal service back-ends (Discussions, Wiki & Blog Server, Oracle WebCenter Content Server) | Mandatory | Only mandatory for services that you use |
| Upgrade WebCenter Portal applications | Mandatory | |
| Upgrade portlet producers | Mandatory | |
| Migrate data on Oracle Content DB and Oracle Wiki and Blog server | Mandatory | |

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