Oracle® WebCenter Portal

Installation and Configuration Roadmap 11*g* Release 1 (11.1.1.9.0) for Windows

E22628-05

April 2015

This documentation roadmap provides instructions on how to install, upgrade, and/or patch Oracle WebCenter Portal, then perform the necessary configurations.

It includes the following topics:

- Starting Points for Oracle WebCenter Portal Installation
- Installing Oracle WebCenter Portal Roadmaps
- Patching an Existing Oracle WebCenter Portal 11g Installation Roadmaps
- Upgrading an Existing Oracle WebCenter 10g Installation Roadmap
- **Documentation Accessibility**

Starting Points for Oracle WebCenter Portal Installation

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.

What do you want to do? Oracle WebCenter Portal

Figure 1 Starting Points for Oracle WebCenter Portal Installation

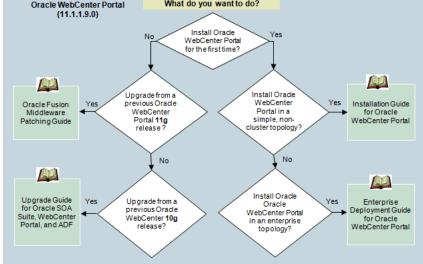




Table 1 Starting Points for Oracle WebCenter Portal Installation

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

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

2 Installing Oracle WebCenter Portal - Roadmaps

The roadmaps in this section provide an overview of the steps required to install Oracle WebCenter Portal for the first time and guide 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 Oracle WebCenter Portal components and tools 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 Installation Planning Guide.

Start Install Oracle Perform pre-install tasks for Oracle Install and Create WebLogicServer configure a requirements schemas and create WebCenter Portal database Middleware Home Download Oracle WebCenter Portal Install Oracle WebCenter Portal Install Oracle WebCenter Portal installer Install Oracle WebCenter Content Install Oracle SOASuite Install other Fusion Middleware products (Oracle HTTP Server) (BPEL Server) as required Server Configure administrator Configure a domain for Oracle WebCenter Select required Oracle WebCenter Start Specify domain Configure JDBC Configuration domain or extend name and component name and Portal Wizard a domain Portal products location schemas password Extend for Create a custom Create a custom Extend the Oracle managed serverfor Portal Framework managed server for Portlet Producer Enable Oracle BPM additional Oracle WebCenter Portal domain (if required) WebCenter Portal Process Spaces products applications applications Launch Set up and start Node Manager Launch the Admin server Verify the installation Start the servers managed servers Configure Oracle WebCenter Portal to Reassociate Install and configure policy and LDAP ID store security components single sign-on use I DAP ID store credential stores Include Content Server context root Set up Content Install and Configure Configure Oracle Connect Oracle Configure domain for Server for Oracle configure dynamic HTTP Server for WebCenter Portal in connection configuration Content Server WebCenter Portal nbound Refine converter single sign-on to Content Server Install, configure, and connect backend Connect to analytics Connect to BPEL Connect to discussion Configure WebCenter Register portlet producers and components for Oracle collector server server ortal workflov pagelet producer WebCenter Portal WSRP, PDK-Java & pagelets Analytics and activity graph Connect to presence Configure SES Configure personalization Connect to mail server events server Oracle WebCenter server Done Instant messaging & presence Mail Search multi

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

Use Table 2 to navigate to the appropriate guide for the installation process for a simple topology.

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		Mandatory	If you want to use WebCenter Portal as well as build Portal Framework applications, you must run the RCU twice as both require their own WEBCENTER schema.
			Schemas for the discussions and portlets are also required if you plan to use them. If you plan on using recommendations, 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	
Insta	ll Oracle WebCenter Portal:	Mandatory	
	Download Oracle WebCenter Portal software		
• I	nstall Oracle WebCenter Portal		
Install other Fusion Middleware products: Oracle WebCenter Content Oracle SOA Suite Oracle Web Tier (Oracle HTTP Server)		Optional	SOA is mandatory for worklists and WebCenter Portal workflows.
			Oracle WebCenter Content is mandatory for using Content Presenter, wiki, and documents.
			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 Oracle SOA.
Configure a domain for Oracle WebCenter Portal		Mandatory	You may choose to create a new domain or extend an existing domain for Oracle WebCenter Portal.

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

Tas	sk and link to more information	Mandatory or Optional?	Notes			
	end the Oracle WebCenter Portal main to:	Optional	Oracle does not recommend deploying Portal Framework			
•	Install additional Oracle WebCenter Portal products		applications or Portlet Producer applications to the Administration Server or any of			
•	Create a custom managed server for Portal Framework applications		the default managed servers created during Oracle WebCenter Portal installation.			
•	Create a custom managed server for Portlet Producer applications		Portai installation.			
•	Enable Oracle BPM Process Spaces					
Sta	rt the servers:	Mandatory				
•	Set up and start the Node Manager					
•	Start the Administration Server					
•	Start managed servers					
•	Verify the installation					
Ins	tall and configure external LDAP ID re	Mandatory	Mandatory for Oracle WebCenter Content Server and Discussion server. Oracle strongly recommends to use database to store security policies.			
	nfigure the domain for Oracle bCenter Content Server	Optional	Mandatory if using Content Presenter, wikis and documents.			
cor	tall, configure, and connect back-end nponents for Oracle WebCenter Portal ls and services:	Optional	Mandatory for the Oracle WebCenter Portal tools and services you want to use			
•	Connect to analytics collector		See also, Post-Installation			
	Connect to BPEL server		Configuration for Oracle WebCenter Portal Components,			
	Connect to discussion server		Tools, and Services.			
•	Configure WebCenter Portal workflows					
	Register portlet producers					
	Register pagelet producer					
	Connect to presence server					
•	Configure SES search					
•	Configure personalization					
•	Connect to mail server					
•	Connect to events server					

Figure 3 illustrates the installation process for an enterprise topology. Use Table 3 to navigate to the appropriate guide.

Start Install and Verify hardware requirements Verify software requirements configure a database Set up shared storage Configure credential and Configure network Virtual server Load IPs and virtual Firewalls and ports components (optional) policy store nstall Oracle HTTP Install WebLogic Server and create a Middleware home on SOAHOST1, Install Oracle WebCenter Portal on SOAHOST1, SOAHOST2, WCHOST1, Server (OHS) on WEBHOST1 & Enable VIP1 in SOAHOST1 SOAHOST2, WCHOST1, WCHOST2 WCHOST2 WEBHOST2 Extend domain for Oracle Configure Oracle HTTP Server for WLS_SOAn Set up and start Node Configure Java Object Create a domain or SOAHOST1 Extend domain for SOA components WebCenter Manager Cache Portal products* Configure required external Oracle WebCenter Portal Configure analytics Configure WebCenter Connect to Connect to BPEL server Register portlet producers egister pagelet producer collector server Portal workflows tools and services To enable Configure Oracle SES Connect to Configure personalization Connect to Connect to mail server events server server search Instant messaging Search multiple & presence sources Mail Configure inbound refinery and Extend domain for Oracle WebCenter Propagate domain to WCHOST1 and Set up Content Server for Oracle Connect Oracle WebCenter Portal Configure OHS for dynamic converter on Content Server Content Server Content Server WCHOST2 WebCenter Portal to Content Server* Enables: Integrate with Oracle WebCenter Portal 11.1.1.9.0 Done Oracle Identity Management

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

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	
Configure network components	Mandatory	
Set up shared storage	Optional	
Configure credential and policy store	Mandatory	Oracle strongly recommends to use database to store security policies
Install Oracle HTTP Server (OHS)	Mandatory	
Install WebLogic Server and create a Middleware home	Mandatory	

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

Task and link to more information	Mandatory or Optional?	Notes			
Install Oracle WebCenter Portal	Mandatory				
Enable VIP1	Mandatory				
Create a domain	Mandatory				
Configure Oracle HTTP Server	Mandatory				
Extend the domain for SOA components	Optional				
Extend domain for Oracle WebCenter Portal components	Mandatory	Option to configure the domain for WebCenter Portal (the out-of-the-box enterprise-ready customizable application) or create a custom managed server for Portal Framework applications and Portlet Producer applications			
Set up and start Node Manager	Mandatory				
Configure Java Object Cache	Mandatory				
Install and configure back-end components for required Oracle WebCenter Portal tools and services:	Optional	Mandatory for the Oracle WebCenter Portal tools and services you want to use			
 Connect to discussion server 		See also, Post-Installation			
 Connect to analytics collector 		Configuration for Oracle WebCenter Portal Components, Tools, and			
 Connect to BPEL server 		Services			
 Configure WebCenter Portal workflows 					
 Register portlet producers 					
 Register pagelet producer 					
 Connect to presence server 					
 Configure Oracle SES search 					
 Configure personalization 					
 Connect to mail server 					
Connect to events server					
Extend domain for Oracle WebCenter Content Server	Optional	Mandatory for WebCenter Portal			
Propagate domain to Oracle WebCenter Portal host	Optional	Mandatory for WebCenter Portal			
Set up Content Server for Oracle WebCenter Portal	Optional	Mandatory for WebCenter Portal			
Configure inbound refinery and dynamic converter on Content Server	Optional	Mandatory for WebCenter Portal			
Configure OHS for Content Server	Optional	Mandatory for WebCenter Portal			
Connect Oracle WebCenter Portal to Content Server	Optional	Mandatory for WebCenter Portal			
Integrate with Oracle Identity Management	Mandatory				

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

Figure 4 Post-Installation Configuration for Oracle WebCenter Portal Components, Tools, and Services

Get WebCenter Portal working	Start WC_Spaces	Verify installation	appli	igure cation ings	Conn back serv	end	Confi	gure lows		estart _Spaces
Get documents working	Install content repository	Complete prerequisite configuration	con	nect to itent sitory		Resta C_Spa				
Get Activity Stream working	set up ste	the Content S eps required for nent support								
Get dis cussions/ announcements working	Start WC_Collabo	Veri ration install		Conf WS-Se		clu	figure ister port HA	disc	nnect to cussions erver	Restart WC_Space
Get portlet producers working	Start WC_Portlet	Verify installation		figure ecurity	Register portlet producers			HA - Indicates specific configuration		
Get pagelet producers working	Start WC_Portlet	Verify installation	Regi pag prod	elet					for a clust	er
Get Analytics working	Start WC_Utilities	Configure analytics collector	Conn anal colle	ytics	WC	Restar _Spa	t ces			
Get Activity Graph working	Enable one activity graph engine only HA	Start WC_Utilities	Ver instal		ana	nect to lytics ector		Resta /C_Sp	art aces	Run activity graph engine
Get personalization working	Start WC_Utilities	Verify installation		nfigure nalizati			start Spaces			
Get IMP working	Install presence server	Complete prerequisite configuration		ect to ence ver		Restar _Spa				
Get events working	Install events server	Complete prerequisite configuration	Conn eve ser	nts		Restar Spa				
Get mails working	Install mail server	Complete prerequisite configuration	Conf mail s conn	erver		Restar _Spa				
Getsearch working	Install Oracle SES	Complete prerequisite configuration	Set se opti		Conne Oracle	ect to SES		Restart _Spac		
Getworklist working	Install Oracle SOA Suite	Complete prerequisite configuration	Conn BP ser	EL		Restar S_Spa				
Get RSS and activity stream working	Set up proxy server									
Get REST working	Configure credential store	Configure identity asserter	Set up ser	proxy ver						
Get subscriptio notifications wo		elfor setsh	ared		g BPEL ure UM					

Table 4 Getting Oracle WebCenter Portal Components, Tools, and Services Working

Oracle WebCenter Portal Component/Tool/Service	Feature	Documentation		
WebCenter Portal	WebCenter Portal, Oracle's out-of-the-box enterprise-ready customizable application, hosted on the WC_Spaces managed server	Get WebCenter Portal up and running		
Documents	Document management, wikis, blogs, Content Presenter	Connect to content repository		
Activity Stream	Activity streaming	Requires Oracle WebCenter Content Server to be set up for documents		
Discussions and announcements	Discussion forums and	Connect to discussions server		
	announcements	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	Analytics reports	Connect to analytics collector		
Activity Graph	Recommendation and	Connect to analytics collector		
	similar item task flows	In a clustered environment, the activity graph engine must be targeted to a single managed server (not the cluster). More		
Personalization	Personalization scenarios	Configure personalization		
Instant Messaging and Presence (IMP)	Presence status, other presence options (such as send mail, send instant message, start phone conference)	Connect to presence server		
Events	Personal calendar and portal event management	Connect to events server		
Mail	Mail task flow	Connect to mail server		
Search	Search task flows	Configure Oracle SES search		
Worklist	Worklist task flows	Connect to BPEL server		
RSS news feeds	External RSS news feeds	Configure proxy for RSS		
REST	RESTful interface to WebCenter Portal tools and services	Configure REST		
Subscriptions and notifications	Notifications about subscribed services and objects	Configure notifications		

3 Patching an Existing Oracle WebCenter Portal 11*g* Installation - Roadmaps

Table 5 lists the Oracle WebCenter Portal installation scenarios that you can patch to the latest release 11.1.1.9.0, and guides you to the documentation in *Patching Guide*.

Before you start, you may also like to read Installation Planning Guide.

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

Starting Point	Documentation Link in Patching Guide		
Oracle WebCenter Portal 11.1.1.8.x Installation	See section "Patching an Oracle WebCenter Portal 11.1.1.8.x Installation"		
Oracle WebCenter Portal 11.1.1.7.0 Installation	See section "Patching an Oracle WebCenter Portal 11.1.1.7.0 Installation"		
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"		

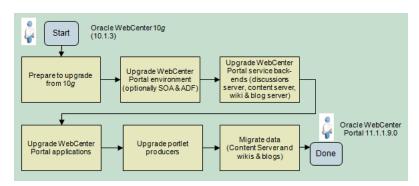
4 Upgrading an Existing Oracle WebCenter 10*g* Installation - Roadmap

If you are currently running Oracle WebCenter 10*g* (10.1.3), you must upgrade your Oracle Application Server 10*g* environment to Oracle Fusion Middleware 11*g*. Figure 5 illustrates the steps required. Use Table 6 to navigate to the appropriate guide.

Before you start, you may also like to read:

- Upgrade Planning Guide
- Installation Planning Guide
- Repository Creation Utility User's Guide
- 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 Oracle WebCenter environment	Mandatory	Upgrade ADF. Also upgrade Oracle SOA Suite if installed
Upgrade Oracle WebCenter tools and services back-ends (Discussions Server, Wiki and Blog Server, Content Server)	Mandatory	Only mandatory for tools and services that you use
Upgrade Oracle WebCenter applications	Mandatory	
Upgrade portlet producers	Mandatory	
Migrate data on Oracle Content DB and Oracle Wiki and Blog server	Mandatory	

5 Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at

http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit

http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Oracle WebCenter Portal Installation and Configuration Roadmap, 11g Release 1 (11.1.1.9.0) for Windows

Copyright © 2009, 2015, Oracle and/or its affiliates. All rights reserved.

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, delivered to U.S. Government end users are "commercial computer software" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, shall be subject to license terms and license restrictions applicable to the programs. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Xeon are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Opteron, the AMD logo, and the AMD Opteron logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

