Oracle® WebCenter Portal

Installation and Configuration Roadmap

11*g* Release 1 (11.1.1.9.0) for Windows

E22628-05

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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

1 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.

Figure 1 Starting Points for Oracle WebCenter Portal Installation

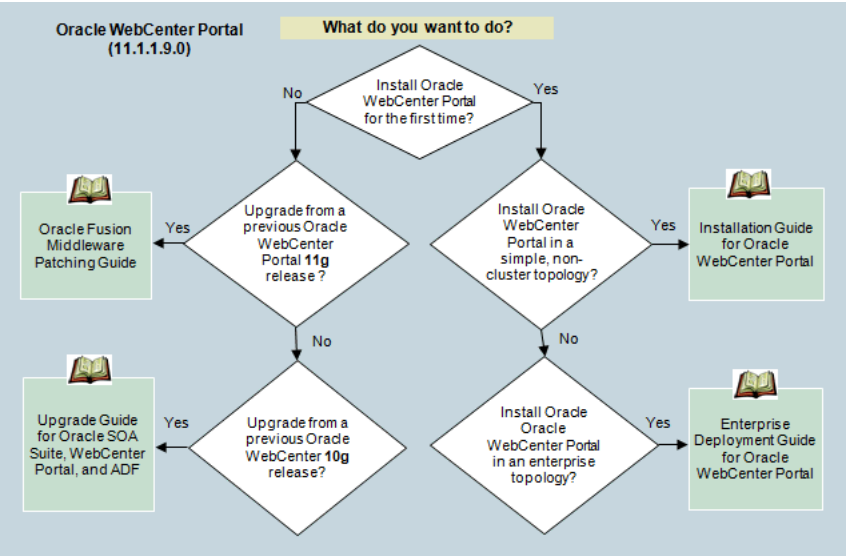


Table 1 Starting Points for Oracle WebCenter Portal Installation

Starting 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 11*g* release to the current version?	Roadmaps	*Patching Guide*
▪ Upgrade from a previous 10*g* 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

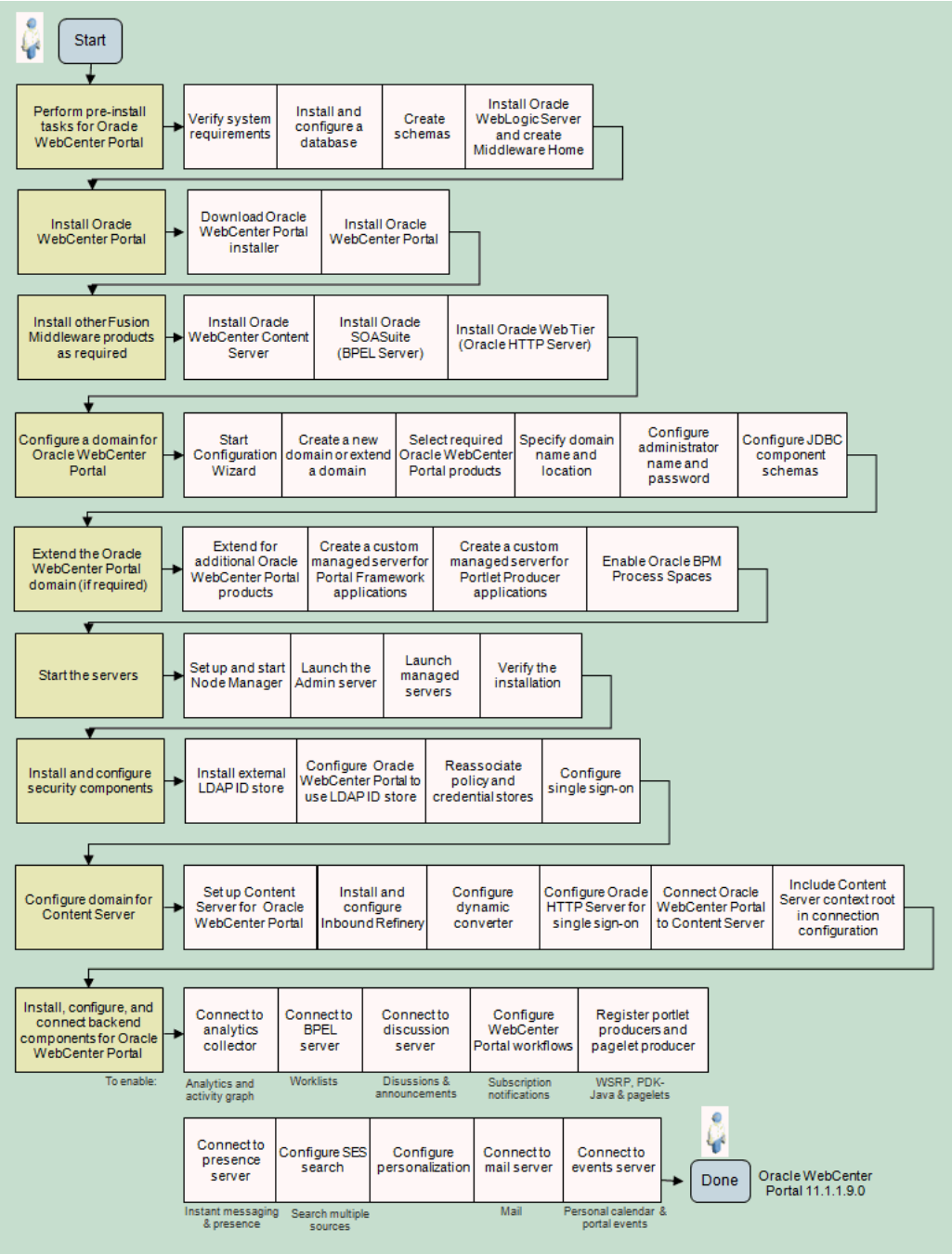
The roadmaps in this section provide an overview of the steps required to install Oracle WebCenter Portal for the first time and guide you to the documentation. Oracle provides documentation for two installation scenarios:

- **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`.

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	
Install Oracle WebCenter Portal: ■ Download Oracle WebCenter Portal software ■ Install Oracle WebCenter Portal	Mandatory	
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

Task and link to more information	Mandatory or Optional?	Notes
Extend the Oracle WebCenter Portal domain to: ■ Install additional Oracle WebCenter Portal products ■ Create a custom managed server for Portal Framework applications ■ Create a custom managed server for Portlet Producer applications ■ Enable Oracle BPM Process Spaces	Optional	Oracle does not recommend deploying Portal Framework applications or Portlet Producer applications to the Administration Server or any of the default managed servers created during Oracle WebCenter Portal installation.
Start the servers: ■ Set up and start the Node Manager ■ Start the Administration Server ■ Start managed servers ■ Verify the installation	Mandatory	
Install and configure external LDAP ID store	Mandatory	Mandatory for Oracle WebCenter Content Server and Discussion server. Oracle strongly recommends to use database to store security policies.
Configure the domain for Oracle WebCenter Content Server	Optional	Mandatory if using Content Presenter, wikis and documents.
Install, configure, and connect back-end components for Oracle WebCenter Portal tools and services: ■ Connect to analytics collector ■ Connect to BPEL server ■ Connect to discussion server ■ 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	Optional	Mandatory for the Oracle WebCenter Portal tools and services you want to use See also, Post-Installation Configuration for Oracle WebCenter Portal Components, Tools, and Services.

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

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

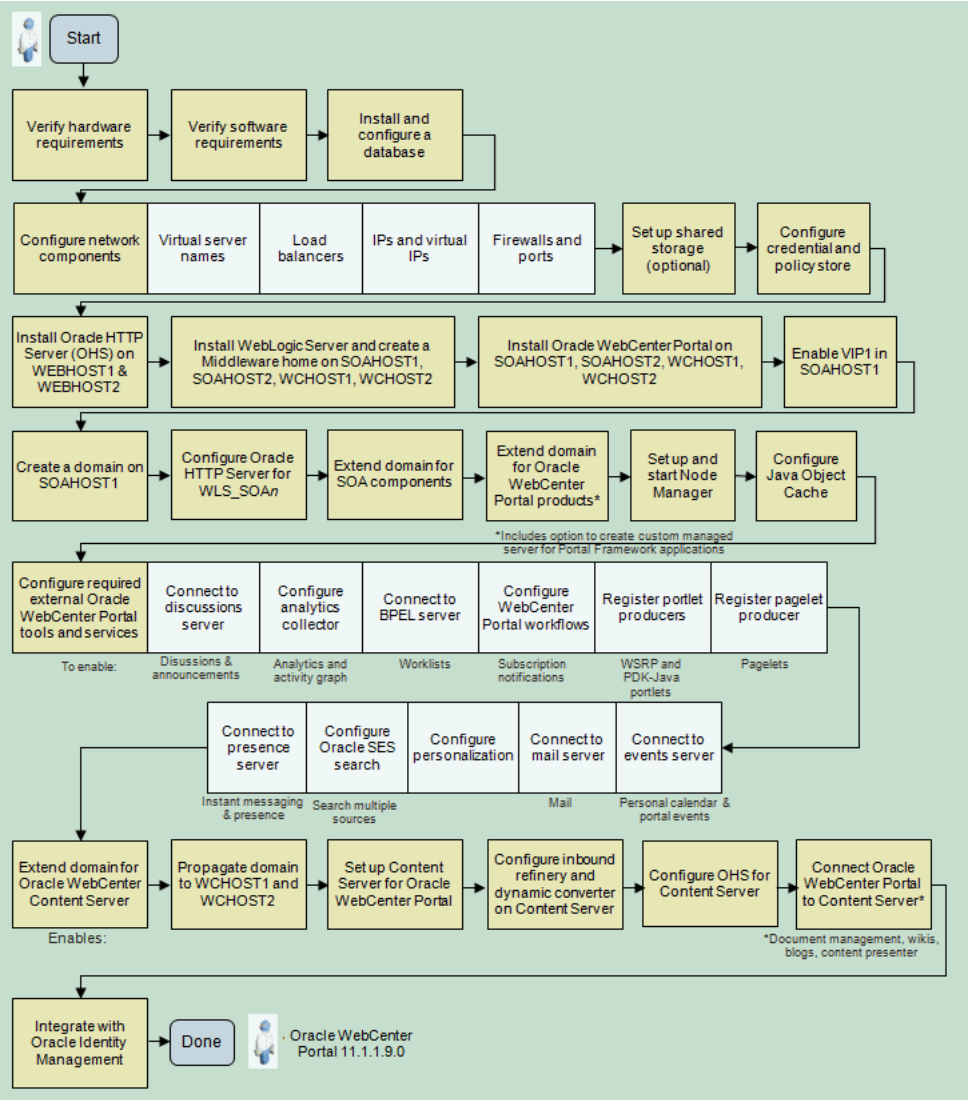


Table 3 Installing Oracle WebCenter Portal for the First Time - Enterprise Topology

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: ■ Connect to discussion server ■ Connect to analytics collector ■ Connect to BPEL server ■ 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	Optional	Mandatory for the Oracle WebCenter Portal tools and services you want to use See also, Post-Installation Configuration for Oracle WebCenter Portal Components, Tools, and Services
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

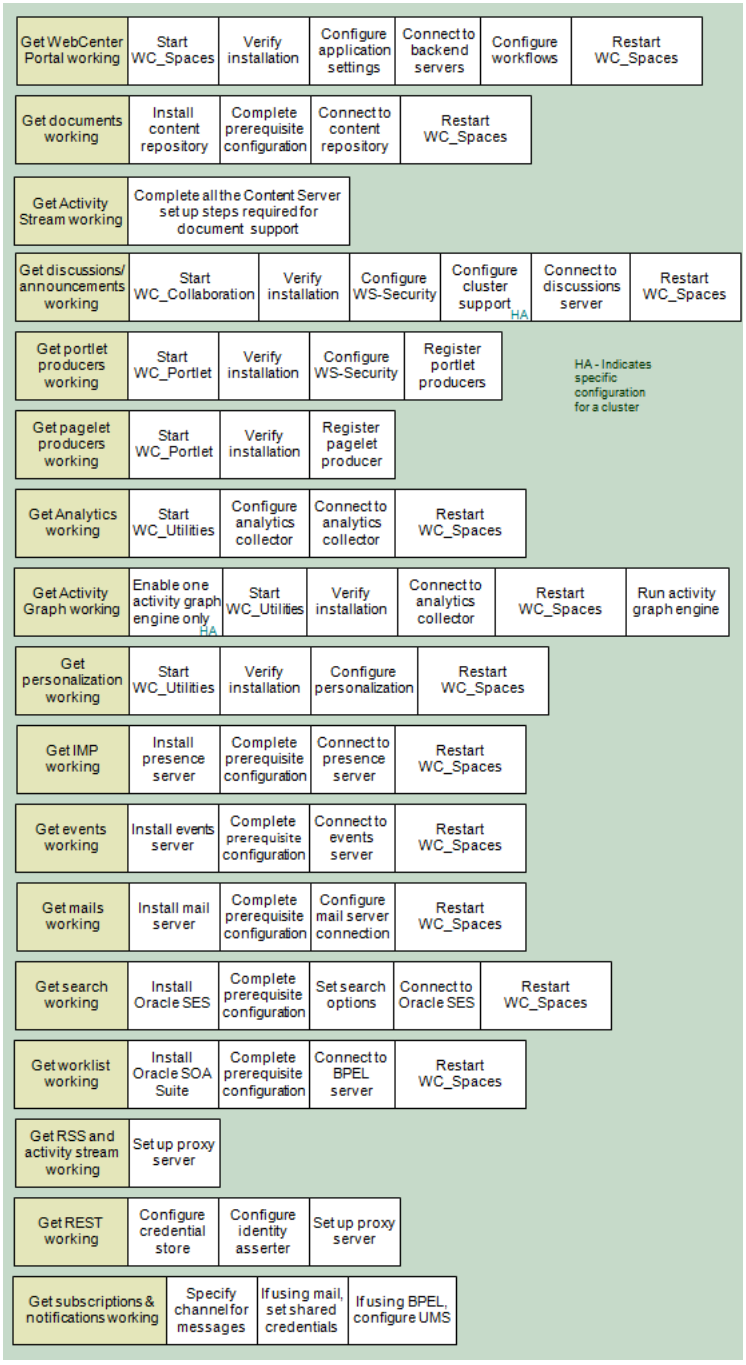


Table 4 Getting Oracle WebCenter Portal Components, Tools, and Services Working

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 announcements	Connect to discussions 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	Analytics reports	Connect to analytics collector
Activity Graph	Recommendation and similar item task flows	Connect to analytics collector 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"

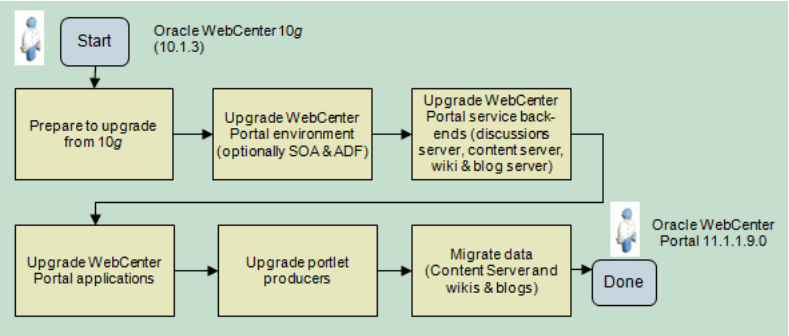
4 Upgrading an Existing Oracle WebCenter 10*g* Installation - Roadmap

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 10*g*	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.

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