RWD uPerform®

User Manual

# RWD uPerform® Administration

Version 3.0

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# Chapter 1: **Introduction**

RWD uPerform® provides authors and administrators with a robust content development and management environment. From recording and editing functionality through secure check in, check out, workflow, and website deployment, RWD uPerform expedites your development and delivery of training materials.

## What is RWD uPerform?

The RWD uPerform® application is a content development and delivery tool designed to enable authors and administrators to create, manage, and distribute documents, simulations, and eLearning courses. Specifically, RWD uPerform allows authors and content administrators to:

- ❒ Create, edit, and manage content
- ❒ Collaborate within the authoring team to review content and share information
- ❒ Incorporate content in an electronic performance support system (EPSS) website and online help
- ❒ Solicit and receive feedback from users
- ❒ Deliver content personalization features such as subscriptions and favorites to authors and users

The RWD uPerform recording functionality allows authors to capture screens, buttons, fields, and other data as the author completes a task. Via one automated recording session, RWD uPerform creates a dual-function, single-source document that is both a step-by-step procedural document and an interactive simulation.

Authors can produce a variety of document output types and simulation playback modes. Published content can support classroom training, performance support websites, and online help. HTML output is particularly well-suited to provide context-sensitive help, and simulations of the target application and actual scenarios are a useful component of realistic training programs.

Authors can also rapidly produce eLearning courses. Courses can be published to the performance support website or to a Learning Management System (LMS). The LMS delivery method is well-suited for standardizing and delivering training courses for business-specific processes.

To manage content, authors and administrators can leverage check in/checkout, versioning, workflow, and collaboration functionality. Users can access content via a standard web browser provide feedback to authors, and collaborate with other users to share knowledge.

There are two parts to the RWD uPerform application:

- ❒ Editor: used to record, create, and edit content.
- ❒ Server: used to configure and manage the document library, website, glossary, and workflow functionality.

# About This Manual

This manual provides details regarding the system administration of uPerform, including server installation and configuration. Information related to using uPerform to create and manage content is provided in the companion manuals *Creating Content with RWD uPerform* and *Managing Content with RWD uPerform*.

## Who Should Read This Manual

This manual includes overview information and step-by-step procedures for system administrators. For purposes of this manual, a system administrator has the following characteristics:

- ❒ Reviews and applies the uPerform hardware and software specifications
- ❒ Installs and configures the uPerform server
- ❒ Manages installations of the uPerform client
- ❒ Performs regular maintenance of the uPerform servers

This manual also references content authors and administrators who develop and maintain content, and end users who access content, share content links with other users, and provide feedback to authors.

## Organization Of This Manual

Chapter 2 and Chapter 3 of this manual provide server overview and installation information. Chapter 4 provides server configuration information. Chapter 5 provides server upgrade information. Chapter 6 provides an overview of the uPerform client installation. Chapter 7 details uninstall procedures for the server. Chapter 8 through Chapter 10 provides information on customization options, managing daily server operations, and troubleshooting information.

## Conventions Used In This Manual

The following conventions are used in this manual:

| Style | Description |
|---|---|
| **Bold** | Indicates a field name, button name, or an option.<br>Example:<br>Click **General** on the left pane. |
| *Italic* | Indicates a screen or window title.<br>Example:<br>The *Step Properties* window is displayed. |
| **SMALL CAPS AND GREATER THAN SYMBOL (>)** | Indicates a menu path.<br>Example:<br>Select **START > PROGRAMS > RWD UPERFORM**. |
| | Indicates an important concept or a caution. |
| | Indicates a helpful hint or amplifying information. |

## Available Technical Support

In addition to the online help delivered with uPerform, RWD offers several additional support mechanisms:

- ❒ The RWD uPerform knowledgebase is available at http://www.products.rwd.com. The knowledgebase is accessible by RWD-licensed users and by SAP North America-licensed users.
- ❒ For customers who license RWD uPerform through the RWD-SAP global reseller agreement, the SAP-hosted knowledgebase is available at http://service.sap.com.
- ❒ The *Creating Content with RWD uPerform*, *Managing Content with RWD uPerform*, and *RWD uPerform Administration* user manuals.
- ❒ Optional instructor-led training. For additional information about our training services, contact your sales representative.

# Chapter 2: Server Landscape and Installation Overview

RWD uPerform® is comprised of two major components: the editor (the client application) and the server. The server is used to store and manage the content created with the editor and with other third-party applications. The server environment is comprised of a database, search engine, indexer, an existing mail server, and the application server.

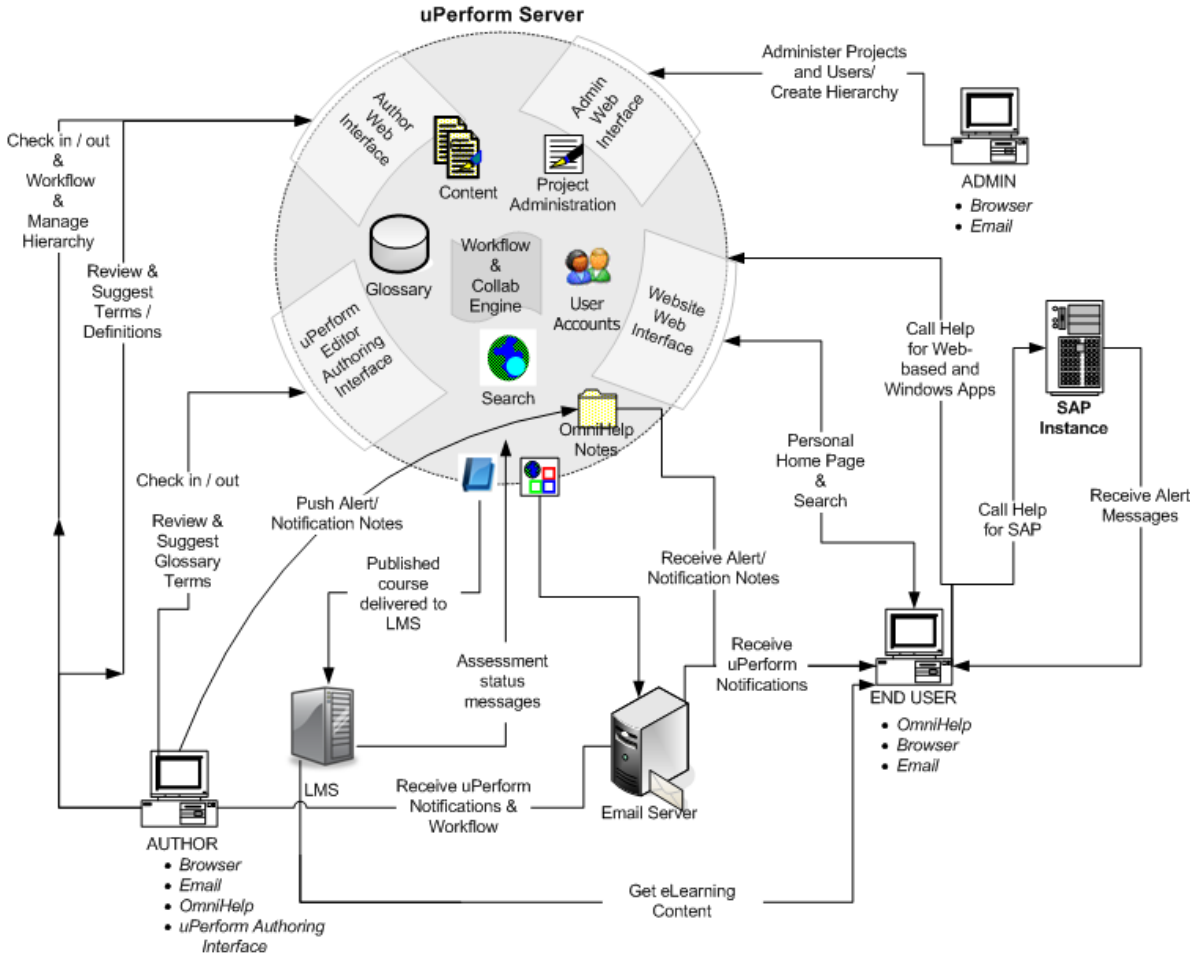
# Introduction to Server Landscape and Installation Overview

This chapter provides a detailed overview of the uPerform server landscape. A pre-installation checklist is included to help you prepare for the installation process.

The procedures in this manual assume you are working in a three-server environment and are using either Microsoft Server 2003 or Oracle 10g in conjunction with Internet Explorer version 6 or 7.

If you are upgrading to version 3.0, you can do so from versions 2.0 and higher. It is recommended that you back up any version 2.X customizations, the Autonomy IDOL Server, and Vignette. For more information on upgrading, refer to "Upgrading an Existing uPerform Server" on page 155.

The following diagram provides an overview of the various interfaces within the uPerform environment.


uPerform Server
Author Web Interface
Admin Web Interface
Content
Project Administration
Glossary
Workflow & Collab Engine
User Accounts
Website Web Interface
uPerform Editor Authoring Interface
Search
OmniHelp Notes
Administer Projects and Users/ Create Hierarchy
ADMIN
• Browser
• Email
Check in / out & Workflow & Manage Hierarchy
Review & Suggest Terms / Definitions
Call Help for Web-based and Windows Apps
SAP Instance
Personal Home Page & Search
Call Help for SAP
Receive Alert Messages
Check in / out
Review & Suggest Glossary Terms
Push Alert/ Notification Notes
Published course delivered to LMS
Receive Alert/ Notification Notes
Assessment status messages
Receive uPerform Notifications
LMS
Email Server
END USER
• OmniHelp
• Browser
• Email
AUTHOR
• Browser
• Email
• OmniHelp
• uPerform Authoring Interface
Receive uPerform Notifications & Workflow
Get eLearning Content

## Understanding the uPerform Server Landscape

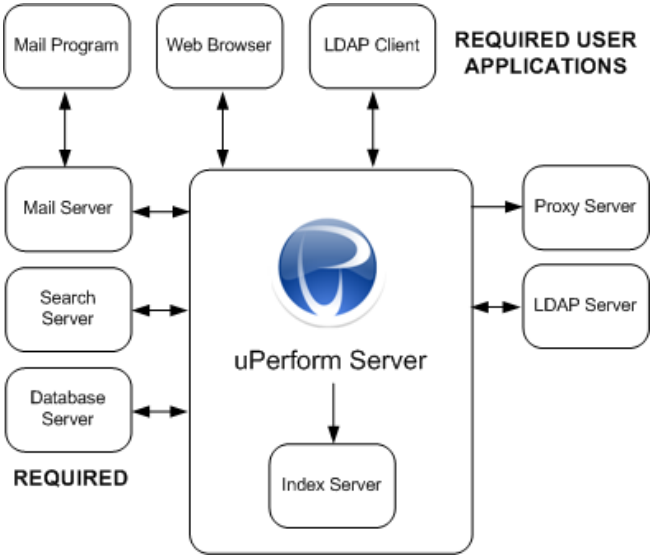
The RWD uPerform server environment incorporates the following major components:

- A web server: delivered with uPerform; supports communication between uPerform and user web browsers and also includes the index server
- A search engine: delivered with uPerform; creates and maintains a search database of content within uPerform
- A Microsoft SQL Server or Oracle 10g database: stores all content objects and indexed metadata
- SMTP services: provides email message delivery to support uPerform notifications

Content developed with the uPerform editor can be checked into and managed with the uPerform server. In addition, most standard file formats including Microsoft Office word processing, spreadsheet, and presentation formats; and Adobe Acrobat .pdf files can be checked into uPerform and indexed. These third-party file formats are referred to as "managed documents" in the uPerform environment.

uPerform allows authors and content administrators to independently create and manage collaboration and personalization features such as discussions, subscriptions, and notifications. The ability to add content folders, participate in discussions, and subscribe to objects is built into the uPerform workspace to enable easy access by content providers.

The following diagram provides an overview of the user and server applications.



## Three-Server Environment vs. Two-Server Environment

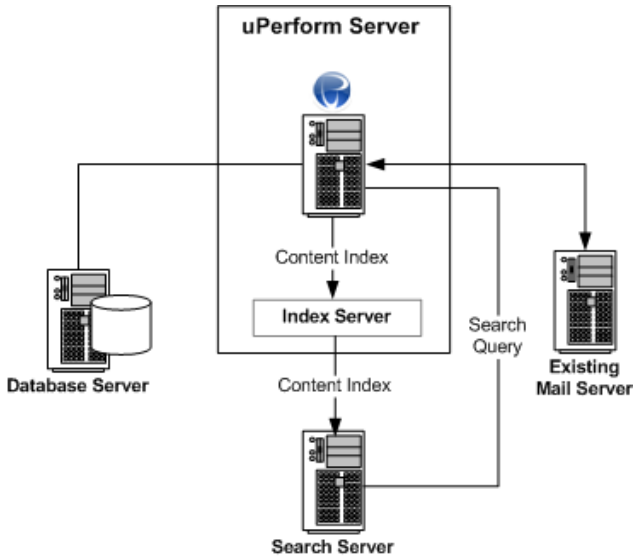
The three-server environment is the recommended environment to robustly support all uPerform operations and ensure flexibility for future expansion. However, in certain scenarios, a two-server implementation may be viable. The decision to implement a two-server environment vs. a three-server environment is based on the total possible concurrency level of end users. You should plan on supporting at least 10% of your total end users concurrently. Based on this calculation, the following guidance is provided:

- ❒ If you must support 500 or more concurrent users, the three-server environment is recommended for optimal performance.
- ❒ If you must support 1-499 concurrent users, the two-server environment can be configured.

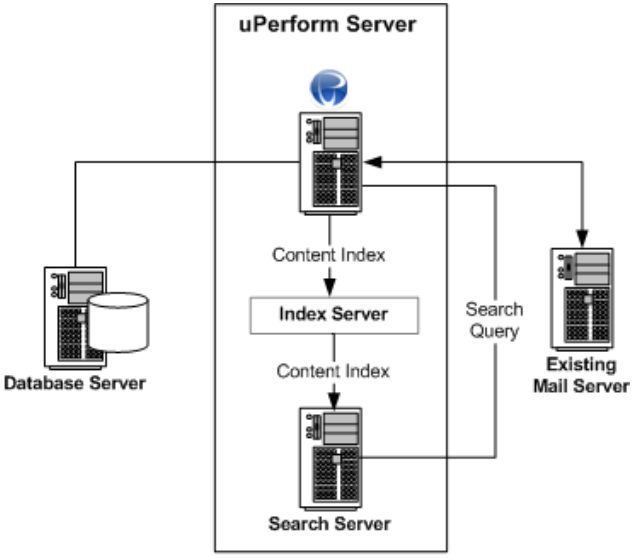
In addition to the number of concurrent users, there are a number of technical variables to consider when evaluating your server landscape. These include, but are not limited to:

- ❒ Geographic distribution of your end users
- ❒ Network connection types (e.g., T1, T2, T3 WAN, or High-Speed LAN) between end users and the uPerform application, search, and database servers
- ❒ Network connection types (e.g., T1, T2, T3 WAN, or High-Speed LAN) between the authors and the uPerform database server
- ❒ Technical capability of the uPerform servers (e.g., number and types of CPUs, amount of RAM, etc.)
- ❒ Total estimated concurrency loading of the uPerform application, search, and database servers
- ❒ Total number of documents, simulations, courses, and managed documents to be stored

Recommended and supported server configurations are depicted in the diagrams on the following page.




**Recommended Three-Server Configuration: uPerform, Search, Database**




**Two-Server Configuration: uPerform, Database**

## Confirming the Required Server Hardware and Software

Recommendations around server disk space are intended as guidelines. Your requirements may increase or decrease based on the size of your content library.

Any non-uPerform applications you install on the uPerform application server will be overwritten during an upgrade of the uPerform server. RWD does not provide support for issues that arise from installation of non-uPerform applications on the uPerform application server.

RWD recommends that Microsoft SQL Server or Oracle 10g be installed on a dedicated server.

A complete set of hardware and software requirements for the server is included in the *Technical Specifications* document delivered with the uPerform software. The current version of the *Technical Specifications* document is available on the RWD uPerform and SAP knowledgebase websites.

# Preparing to Install the Server

There are four major steps to the uPerform server installation:

- ❒ Install and configure the Microsoft SQL Server or Oracle 10g database on a dedicated server
- ❒ Install the Autonomy search server
- ❒ Install the Vignette software on the application server
- ❒ Install the uPerform software on the application server

For information on upgrading an existing uPerform server, refer to "Upgrading an Existing uPerform Server" on page 155.

RWD recommends you install any system updates prior to installing the server software.

## Indexing Overview

When uPerform is installed, an instance of the index server is also installed. The index server uses technology developed by Autonomy (http://www.autonomy.com).

Autonomy creates and maintains indexes of the information stored in uPerform. The following is a partial list of the file formats indexed by Autonomy:

- ❒ Microsoft Office formats
- ❒ Adobe Acrobat .pdf format
- ❒ HTML formats, including .htm and .html
- ❒ XML formats, including .xml, .xsd, and .xsl
- ❒ ASCII .txt format

## Installation Planning Checklist

Prior to beginning the installation, use the following checklist to note required information. Entering this information now will assist you in verifying and confirming information during the installation process.

| General Installation Information | |
|---|---|
| Database Server DNS Name: | |
| Application Server DNS Name: | |
| uPerform DVD or Install Path: | |
| Is Proxy Required? | Yes/No |
| Proxy Authentication Required?<br>If proxy authentication is required, users must enter the user ID and password in the uPerform client. | Yes/No |
| Proxy Server: | |
| Proxy Port: | |
| Proxy Type: | ___HTTP, ___Socks, _____Other |
| Search Server Installation Information | |
| Search Server Name: | |
| Mail Server Address (static IP address or DNS name): | |
| Mail Server Port (default is 25): | |
| Application Server Install Information | |
| Collaboration Server DNS Name: | |
| Collaboration Server HTTP Port: | |
| STMP Server (Mail Server) Name: | |
| Database Administrator User Name (database administrator login): | |
| Database Administrator Password: | |
| Collaboration Database Name (static IP address or DNS name): | |
| Collaboration Database Port: | |
| Collaboration Server HTTP Port: | |
| Collaboration Database Name (newly-assigned): | |
| Collaboration Database User Password (newly-assigned): | |
| Glossary Database Name: | |
| Database User Name (newly-assigned): | |

| uPerform Server Installation Information | |
|---|---|
| SQL Server or Oracle Name: | |
| SQL or Oracle User Name (database administrator ID): | |
| SQL or Oracle Password (database administrator password): | |
| Application Server DNS Name: | |
| SMTP Server (Mail Server) Name: | |
| IIS Port Used by the uPerform Website: | |
| Single Sign On Website: | |
| Port (if necessary): | |

# Chapter 3: Installing the Server

The RWD uPerform® server installation process is comprised of four components: the database server, the uPerform search server, the Vignette software, and the uPerform application server.

# Introduction to Installing the Server

The subsections and procedures in this chapter provide step-by-step instructions for installing the uPerform server. To ensure a proper installation, perform each installation step sequentially as instructed in this chapter. The server components should be installed in the following order:

- ❒ Install and configure a dedicated database server
- ❒ Install the Autonomy search server
- ❒ Install the Vignette software on the application server
- ❒ Install the uPerform software on the application server

## Installation Checklist

The following checklist can be used to track your progress through the installation.

| Completed? | Task | Reference |
|---|---|---|
| | Plan the server deployment | page 10 |
| | Complete the installation planning checklist | page 16 |
| | Install the Database Server | page 22 |
| | Install the Search Server | page 58 |
| | Install the Application Server | page 76 |
| | Test the Vignette Installation | page 95 |
| | Configure the search functionality | page 99 |
| | Test the search configuration | page 101 |
| | Install the RWD uPerform software | page 104 |
| | Configure the RWD uPerform software | page 117 |
| | Configure properties from the server workspace | page 122 |
| | Import users via LDAP | page 143 |
| | Schedule automated glossary, publishing, and synchronizing tasks | page 146 |

# Installing the Database Server

To ensure proper installation, perform the procedures in this section in the order specified. Prior to installing, refer to the *Technical Specifications* and the *Release Notes*. The *Technical Specifications* and *Release Notes* can be found on the RWD uPerform and SAP knowledgebase websites.

## Executing the Database Server Installation

RWD uPerform supports the Microsoft SQL Server and the Oracle Enterprise server. Refer to the following subsections for more information.

The procedures in the following subsections contain default settings for installing Microsoft SQL and Oracle. Please contact your database administrator for information on any custom settings to be used in your uPerform environment.

## Installing Microsoft SQL Server

RWD uPerform supports the use of Microsoft SQL Server 2000 or SQL Server 2005.

If you will be installing Microsoft SQL Server and will be using double-byte languages in your uPerform implementation, you must install SQL Server 2005.

The documentation provided with the SQL Server products provides complete instructions on installing SQL Server. Refer to the following for detailed installation instructions:

- Installing SQL Server 2005: http://msdn2.microsoft.com/en-us/library/ms143516.aspx
- Installing SQL Server 2000: http://msdn2.microsoft.com/en-us/library/aa176559(SQL.80).aspx

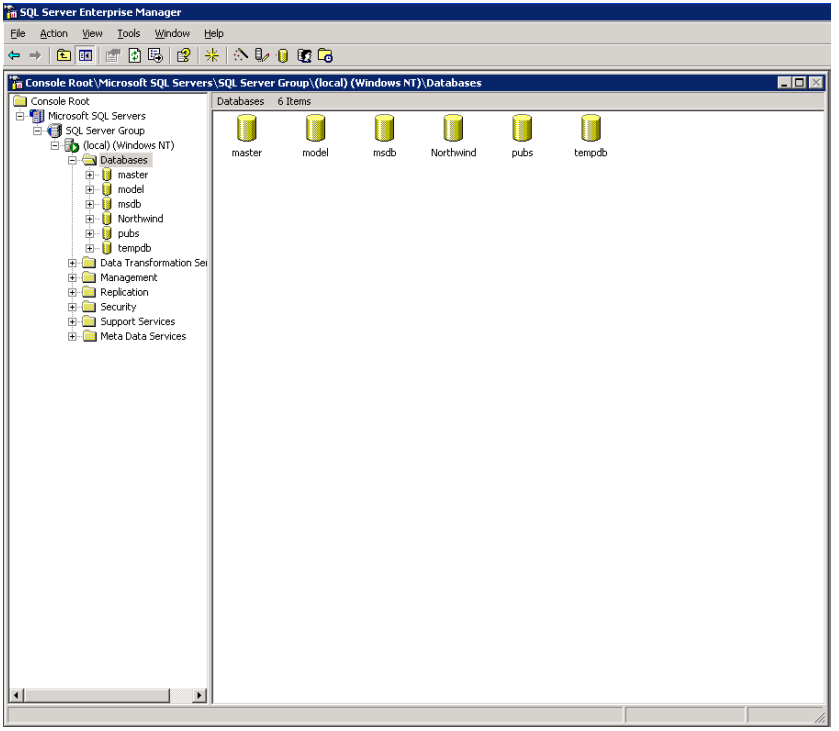
Additional reference resources for SQL Server can be found at the following locations:

- Microsoft SQL Server TechCenter: http://www.microsoft.com/technet/prodtechnol/sql/default.mspx
- MSDN SQL Server: http://msdn2.microsoft.com/en-us/library/ms950403.aspx

## *Creating a Blank Database for Microsoft SQL Server*

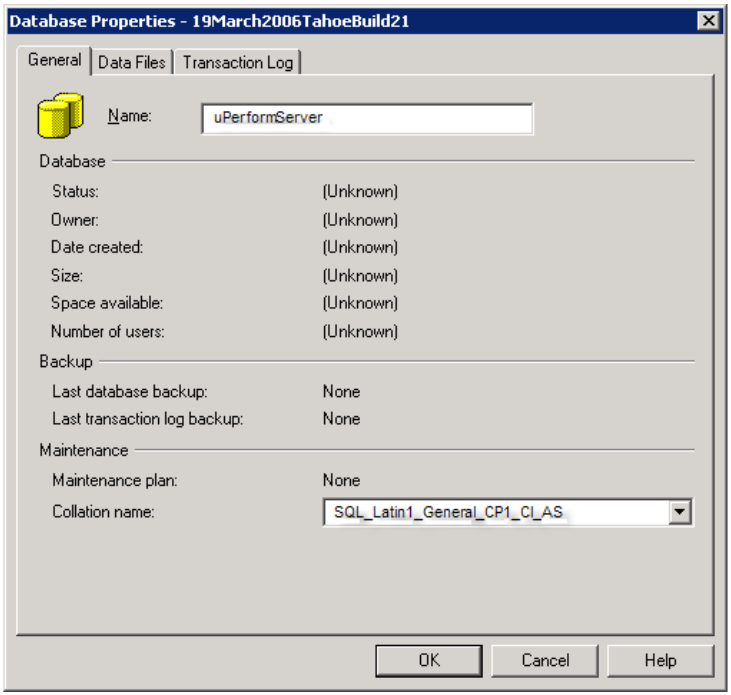
1. Select **START > ALL PROGRAMS > MICROSOFT SQL SERVER > ENTERPRISE MANAGER**.

2. Navigate to **CONSOLE ROOT > MICROSOFT SQL SERVERS > SQL SERVER GROUP > (LOCAL) (WINDOWS NT) > DATABASES**.




3. Right-click on **Databases**.

4. Select **New Database...** .




5. Enter a name for the database.

6. In the maintenance section, ensure the collation name is set to: **SQL_Latin1_General_CP1_CI_AS**.

7. Click **OK**.

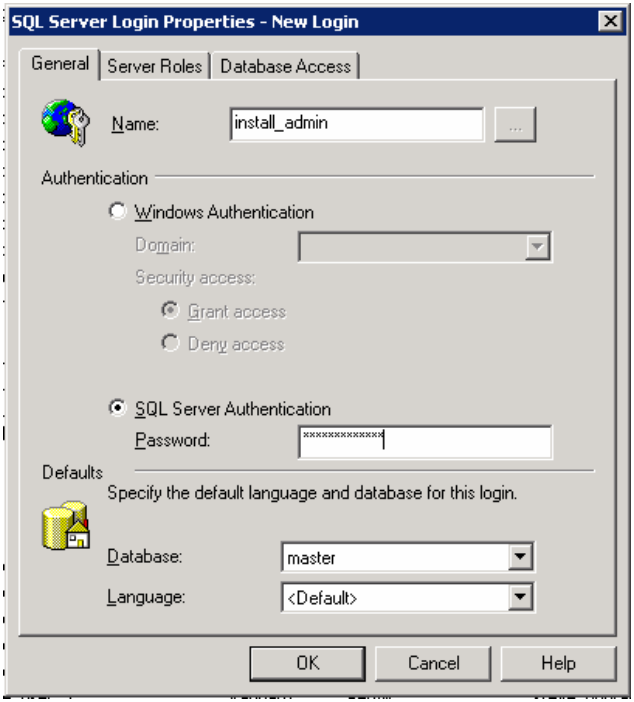
## *Creating a System Administrator Login for Microsoft SQL Server*

Creating a system administrator is not required if your IT group has already created a database administrator account for this project.

1. In SQL Server Enterprise Manager, browse to **CONSOLE ROOT>MICROSOFT SERVERS>SQL SERVER GROUP>(LOCAL)(WINDOWS NT)>SECURITY>LOGINS**.

2. Right-click on **Logins**.

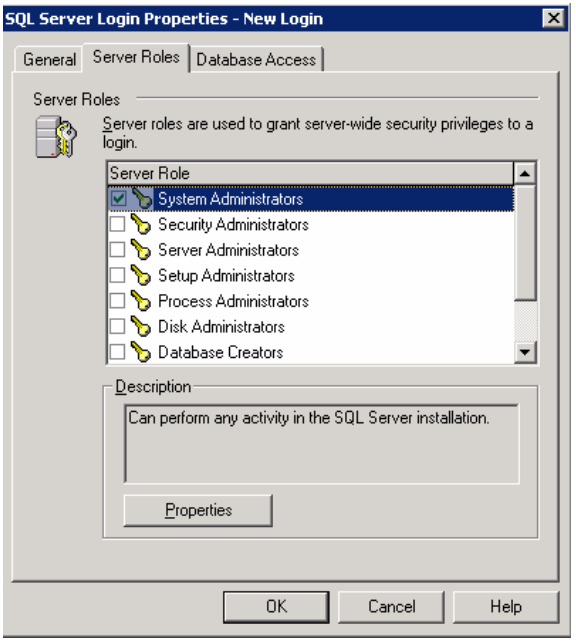
3. Select **New Login…** .




4. Enter the database administrator name in the **Name** field.

5. Enter the database administrator password in the **SQL Server Authentication** field.

6. Click the **Server Roles** tab.




7. Ensure the **System Administrators** checkbox is selected.

8. Click **OK**.

## Installing Oracle

The documentation provided with the Oracle 10g Enterprise Server provides instructions on installing the Oracle Server.

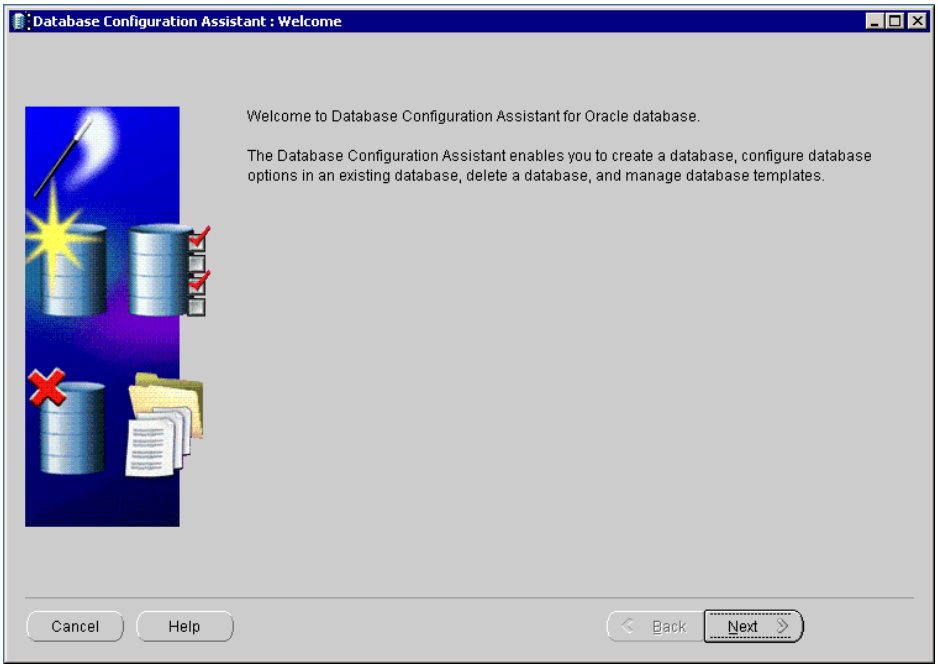
Additional information regarding modifications for Vignette can be found in the uPerform *Technical Specifications* and *Release Notes*. The *Technical Specifications* and *Release Notes* can be found on the RWD uPerform and SAP knowledgebase websites.

Refer to the following for detailed installation instructions:

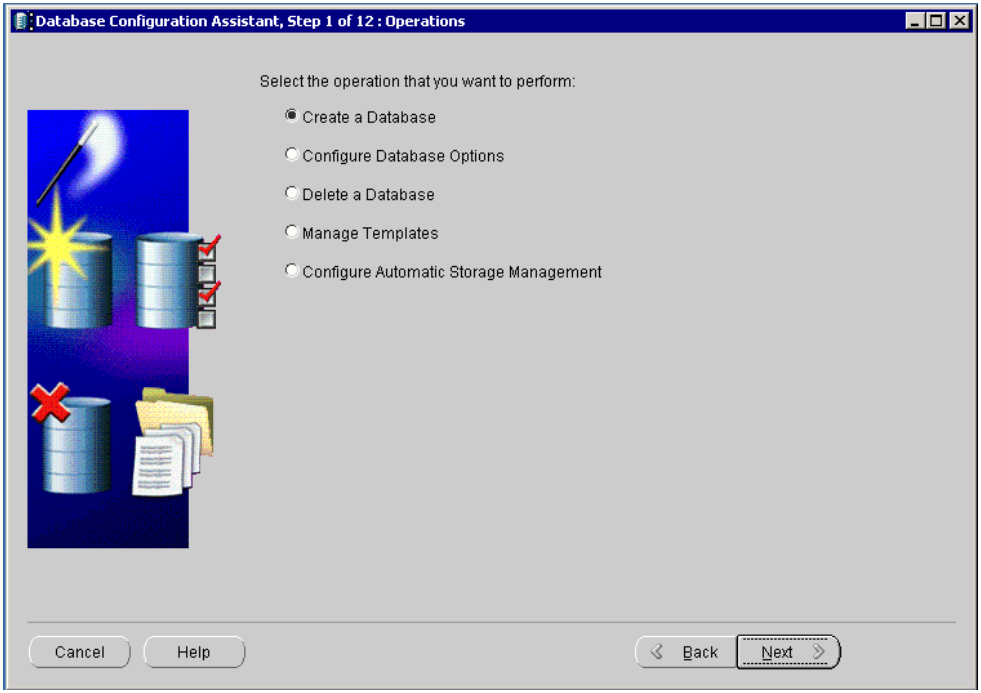
- ❒ Installing Oracle 10g Enterprise: http://www.oracle.com/pls/db102/homepage
- ❒ Installing Oracle Data Access Components (ODAC) for Windows Release 2: http://www.oracle.com/technology/software/tech/windows/odpnet/index.html

## *Creating a Blank Glossary Database for Oracle*

1. Select **START > ORACLE - ORADB10G_HOME1 > CONFIGURATION AND MIGRATION TOOLS > DATABASE CONFIGURATION ASSISTANT**.

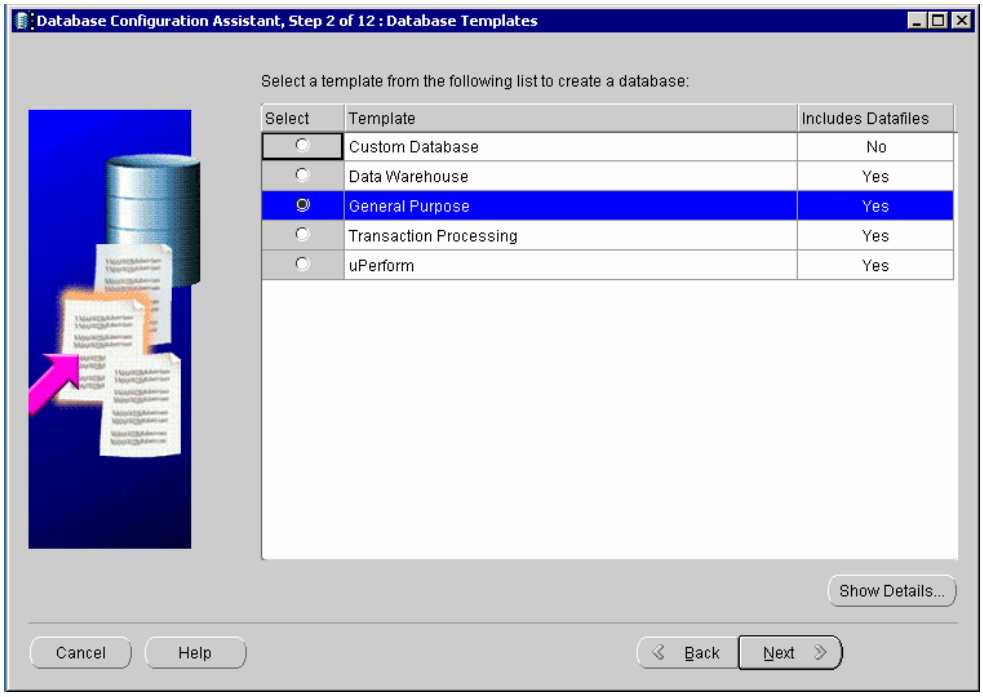



2. Click **Next**.



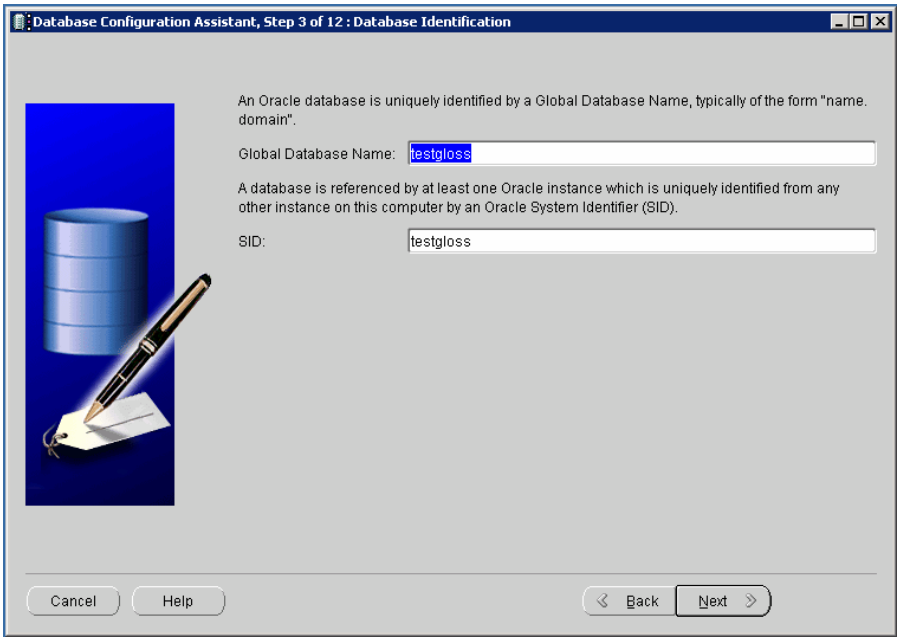

3. Select **Create a Database**.

4. Click **Next**.




5. Select **General Purpose**.

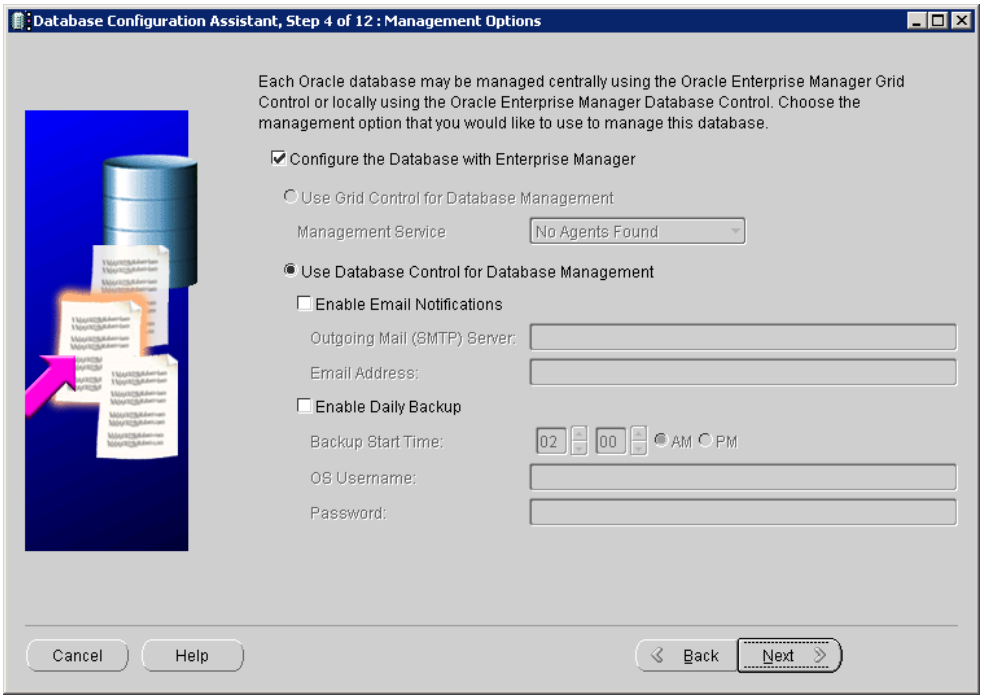
6. Click **Next**.




7. Enter a global database name in the **Global Database Name** field.

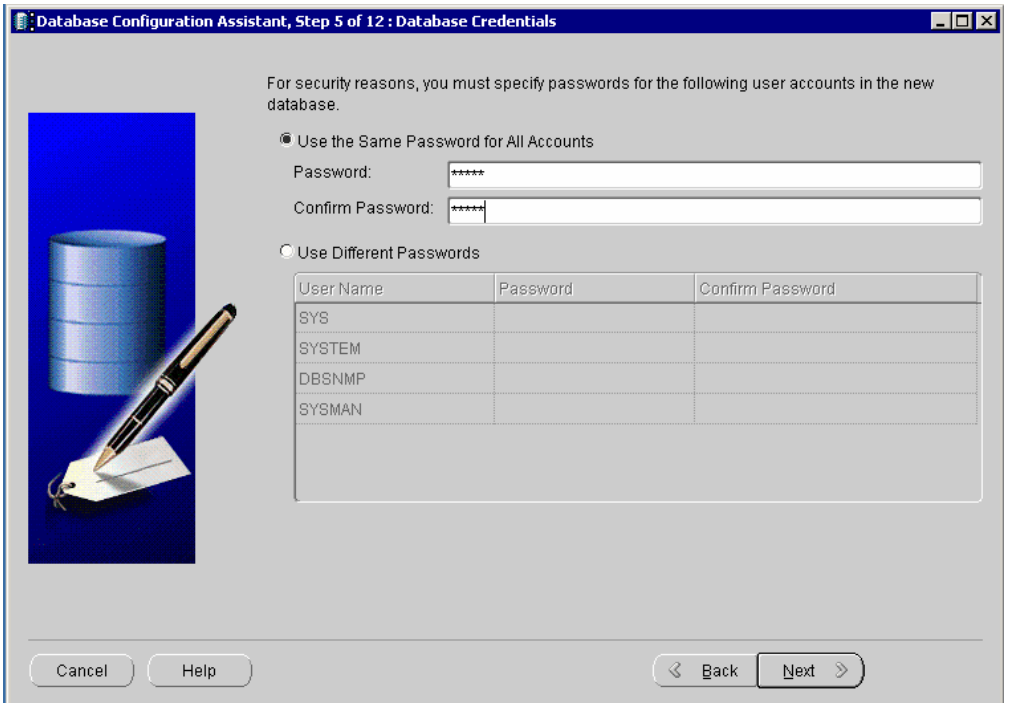
   The database name cannot exceed eight characters or begin with special characters.

8. Click **Next**.




**9.** Select **Configure the Database with Enterprise Manager**.

**10.** Click **Next**.



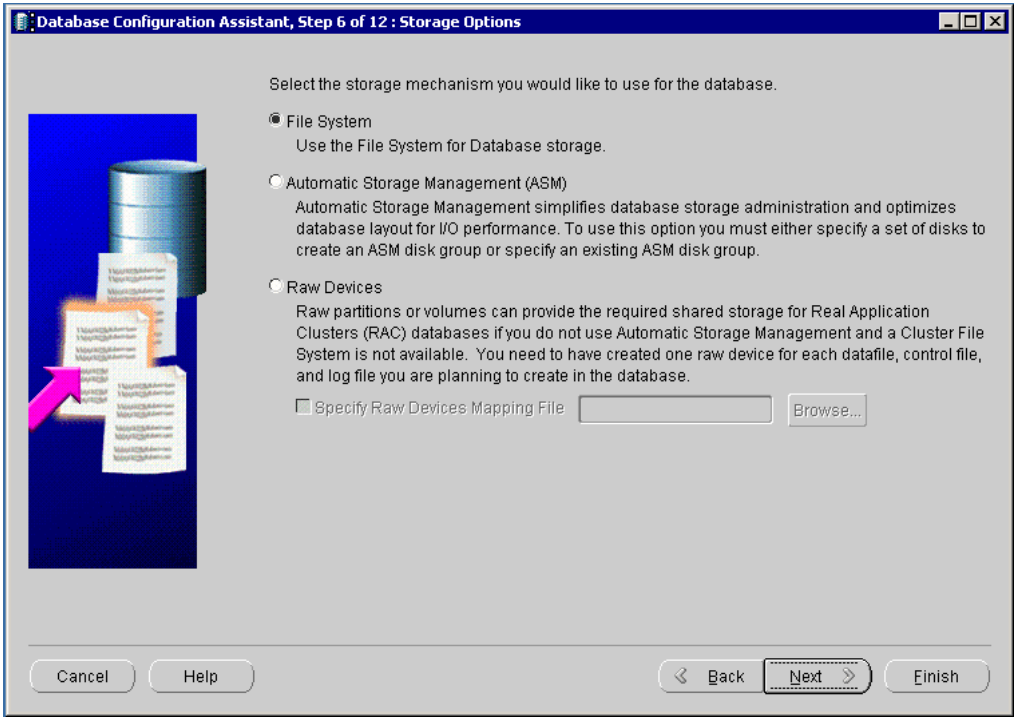

**11.** Select **Use the Same Password for All Accounts**.

**12.** Enter a password for the user account.

Do not use special characters.

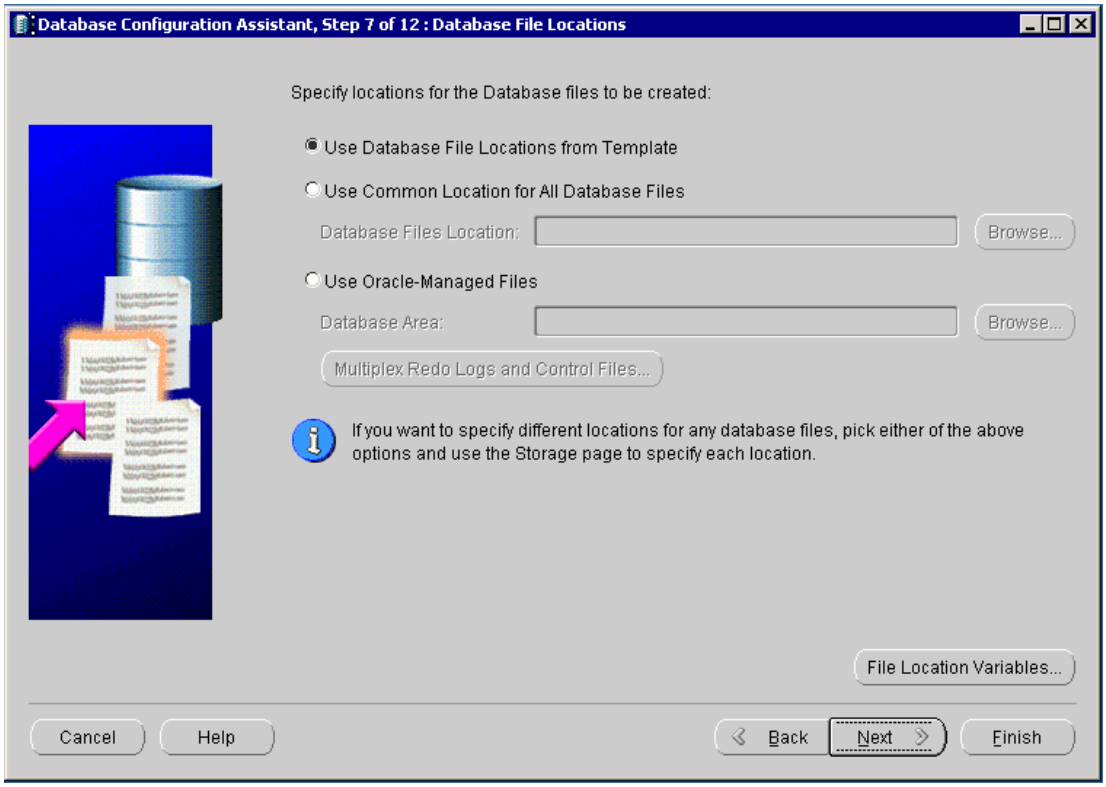
**13.** Confirm the password.

**14.** Click **Next**.



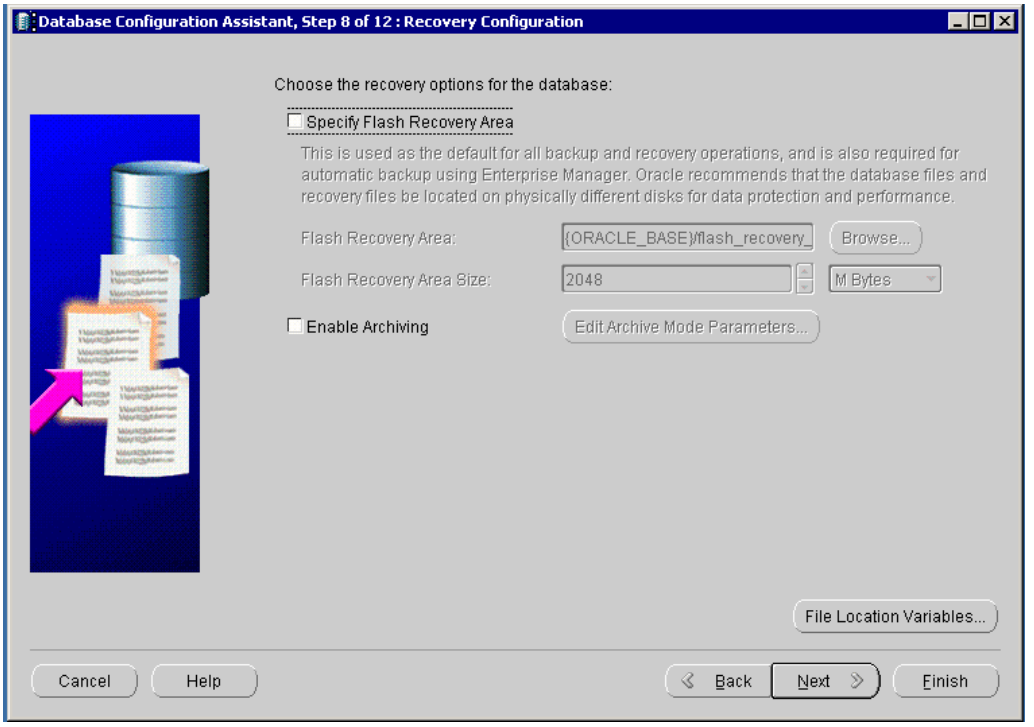

**15.** Select **File System**.

**16.** Click **Next**.



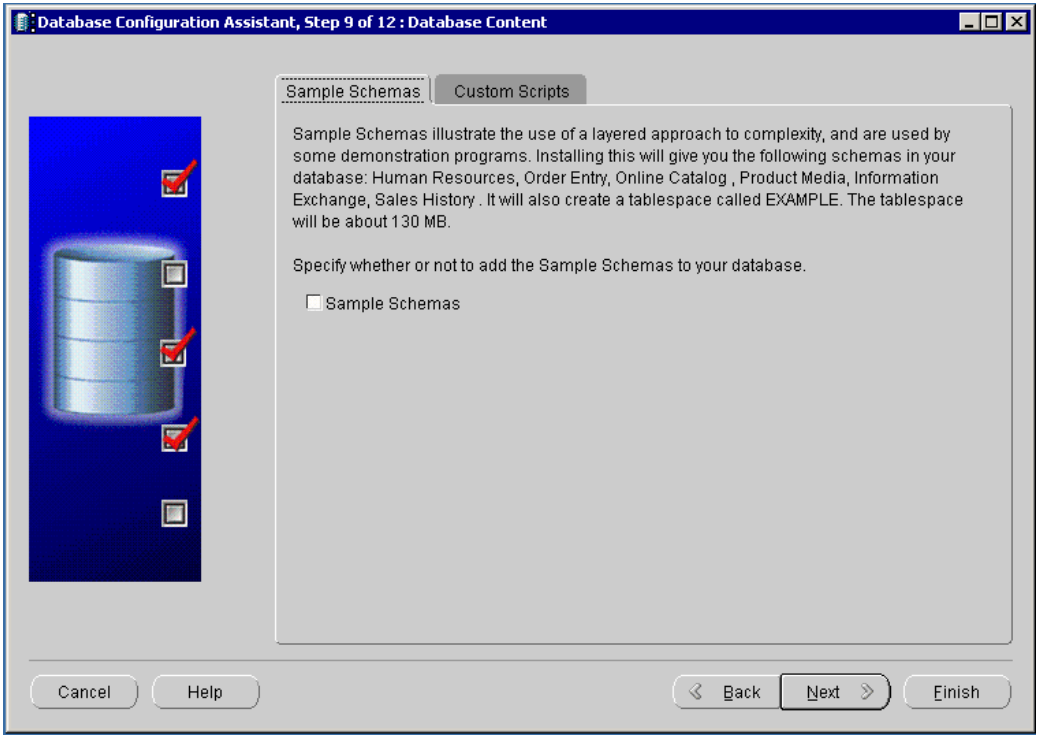

17. Select **Use Database File Locations from Template**.

18. Click **Next**.

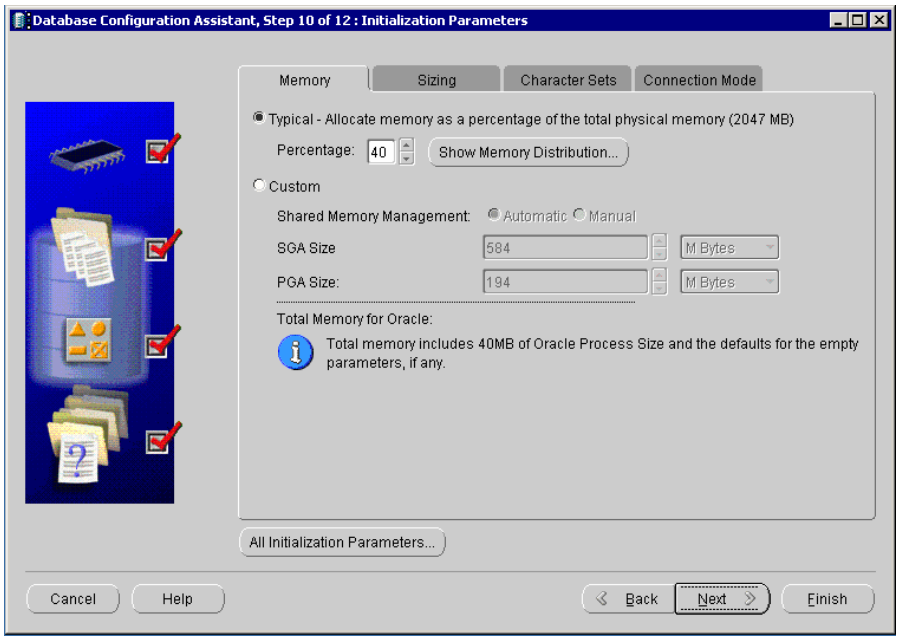



**19.** Contact the database administrator to specify recovery options for the database.

**20.** Click **Next**.



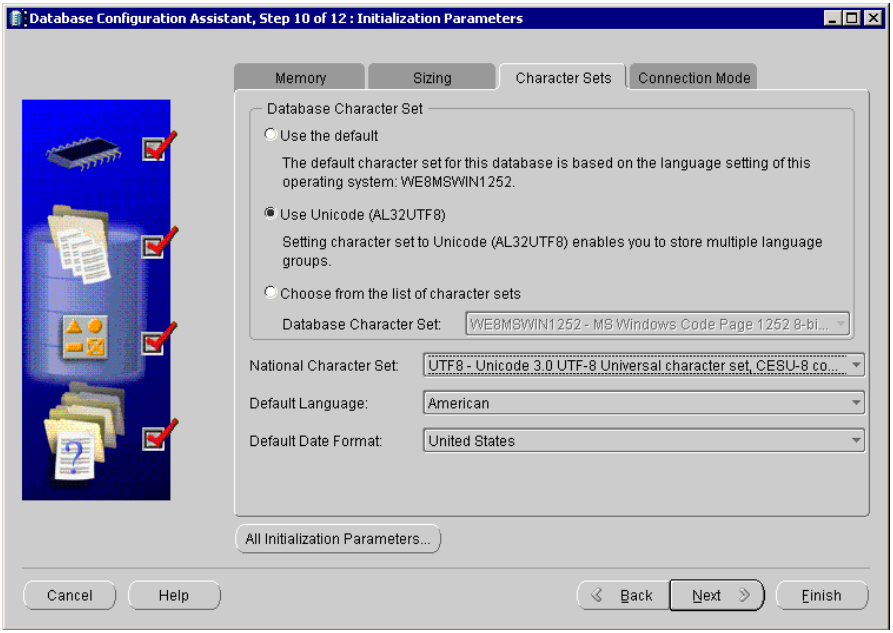

**21.** Click **Next**.




**22.** Select the **Typical** radio button.

**23.** Contact the database administrator to specify memory options for the database.

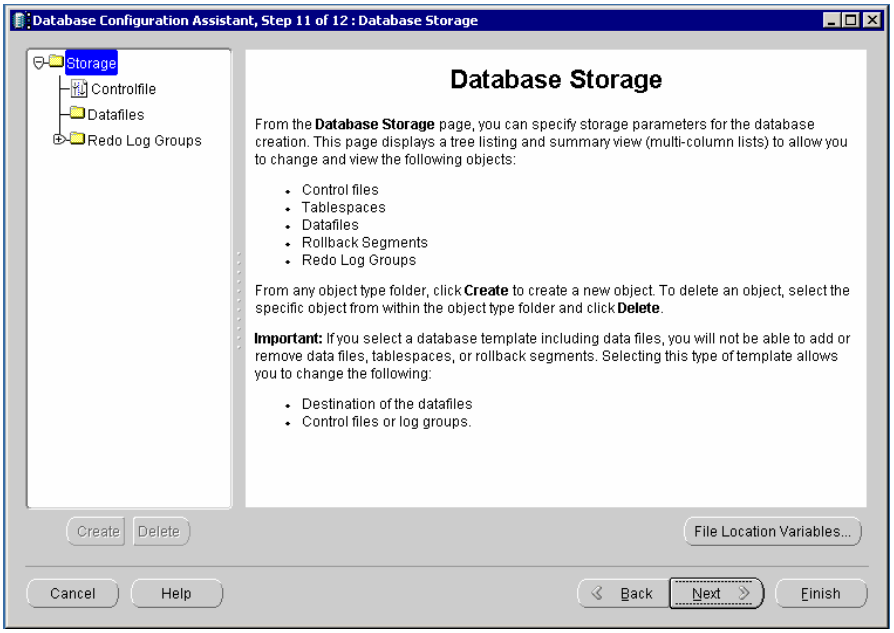
**24.** Select the **Character Sets** tab.



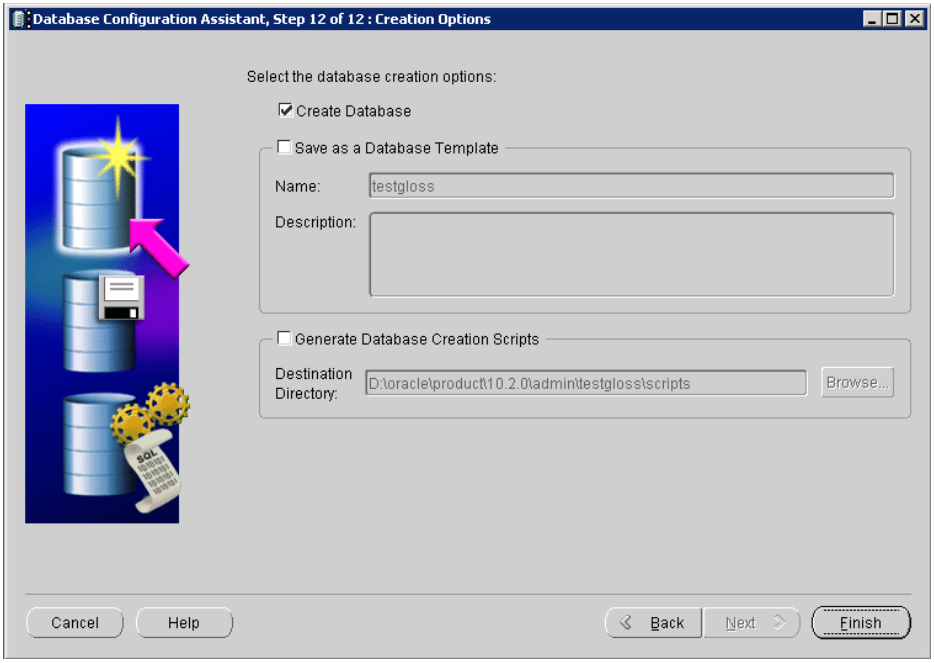

**25.** Select the **Use Unicode (AL32UTF8)** radio button.

**26.** Set the **National Character Set** to **UTF8 - Unicode 3.0 UTF - 8 Universal character set, CESU-8 compliant**.

**27.** Click **Next**.

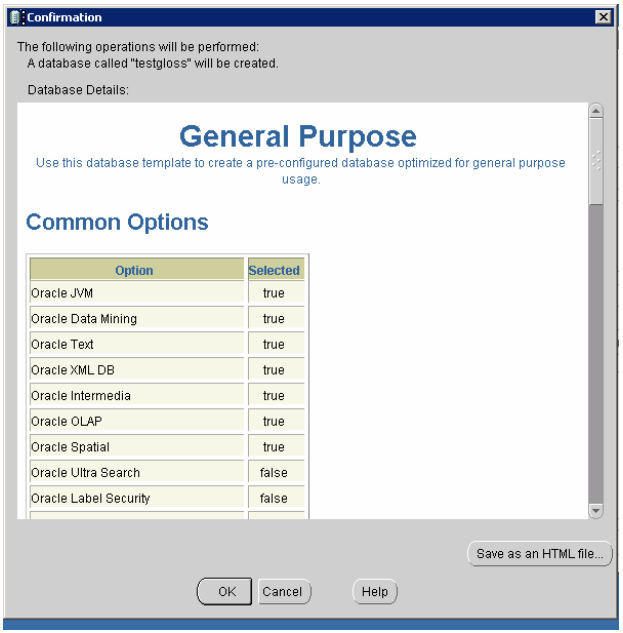



**28.** Click **Next**.

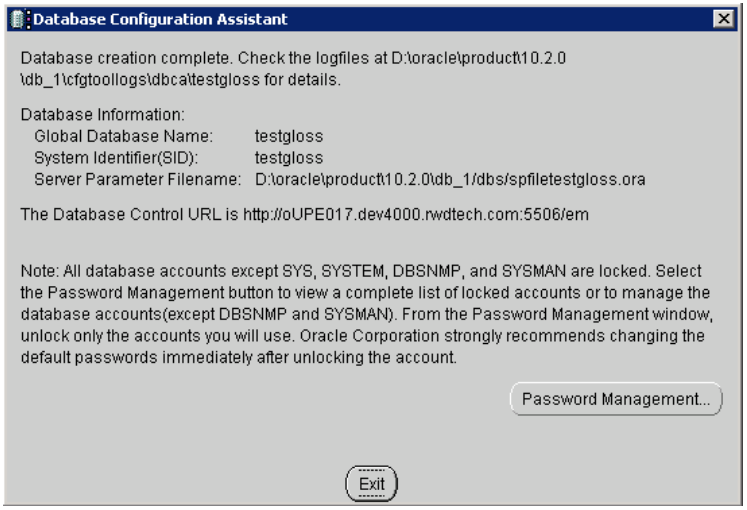



**29.** Select **Create Database**.

**30.** Click **Finish**.



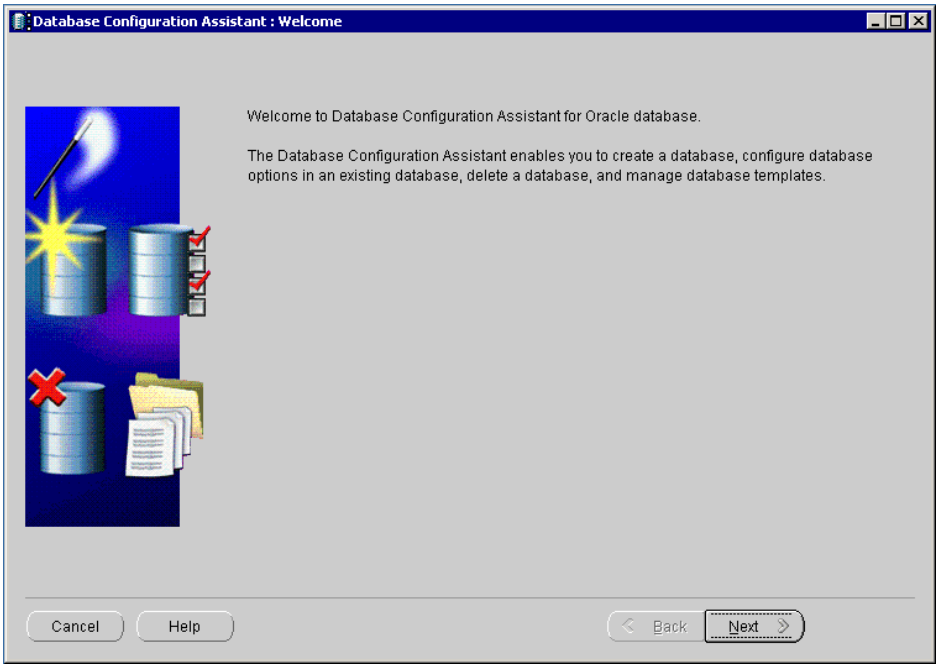

**31.** Click **OK**.



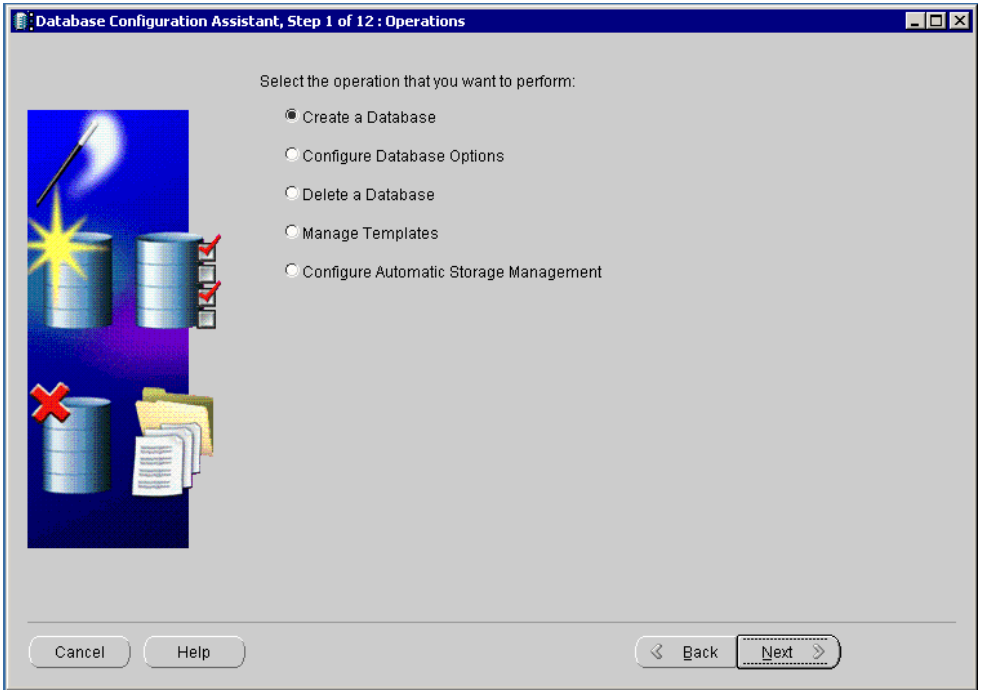

**32.** Click **Exit**.

## *Creating a Blank Collaboration Database for Oracle*

1. Select **START > ORACLE - ORADB10G_HOME1 > CONFIGURATION AND MIGRATION TOOLS > DATABASE CONFIGURATION ASSISTANT**.

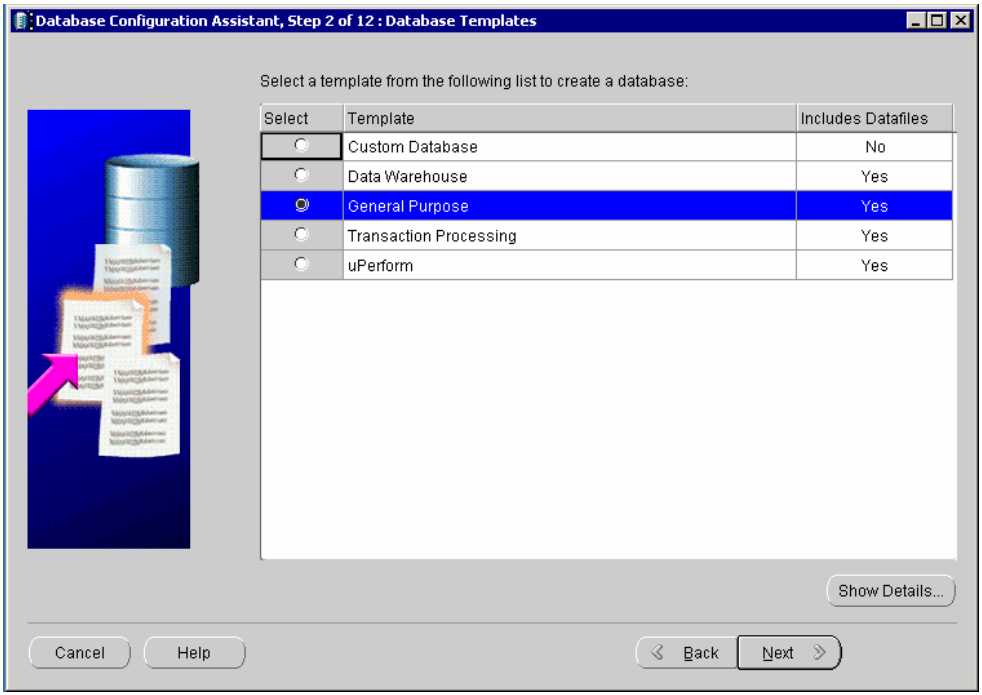



2. Click **Next**.



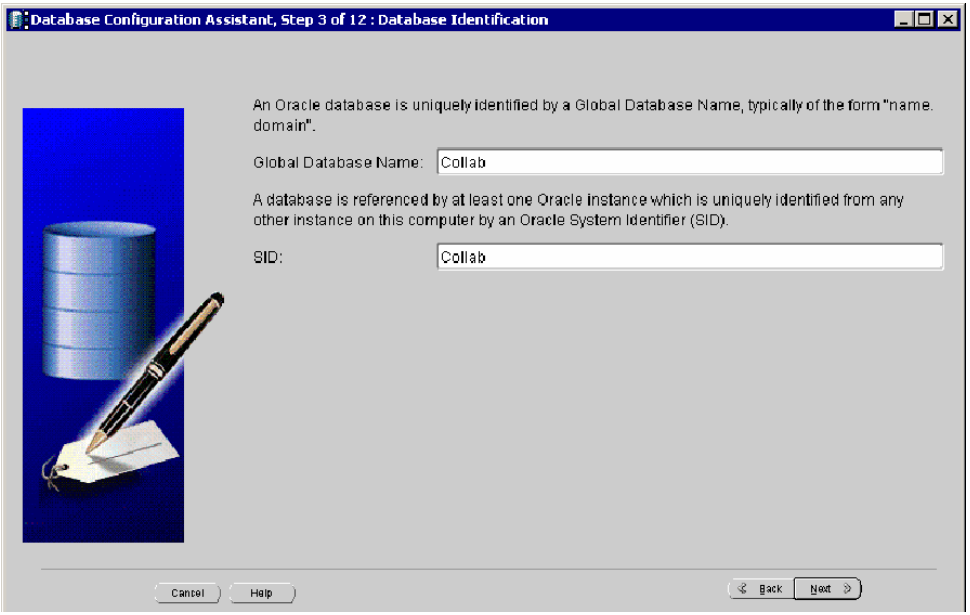

3. Select **Create a Database**.

4. Click **Next**.




5. Select **General Purpose**.

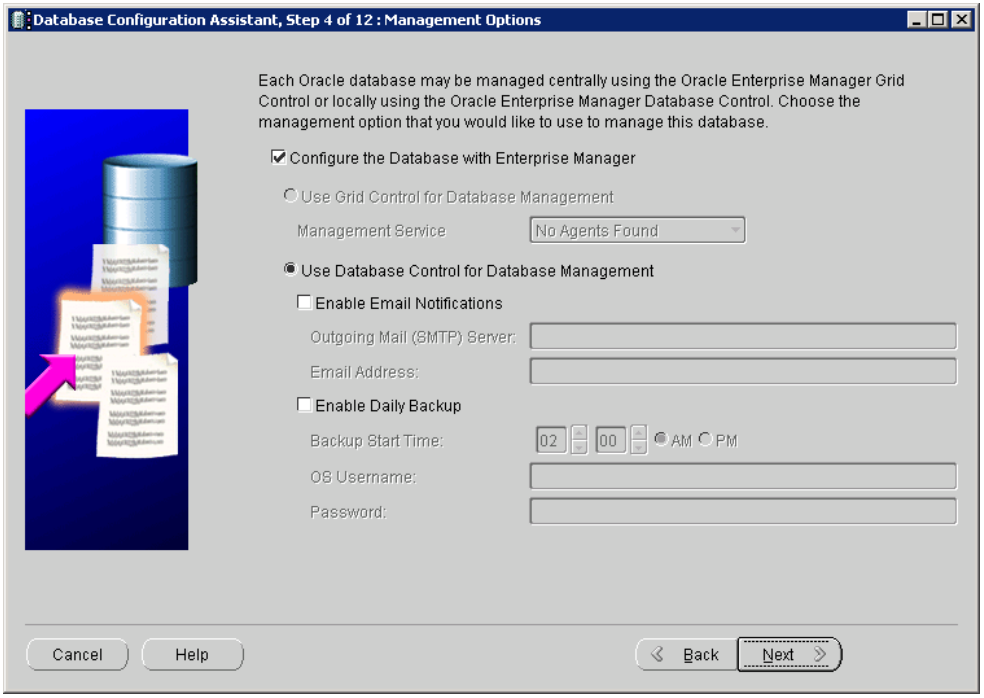
6. Click **Next**.




7. Enter a global database name in the **Global Database Name** field.

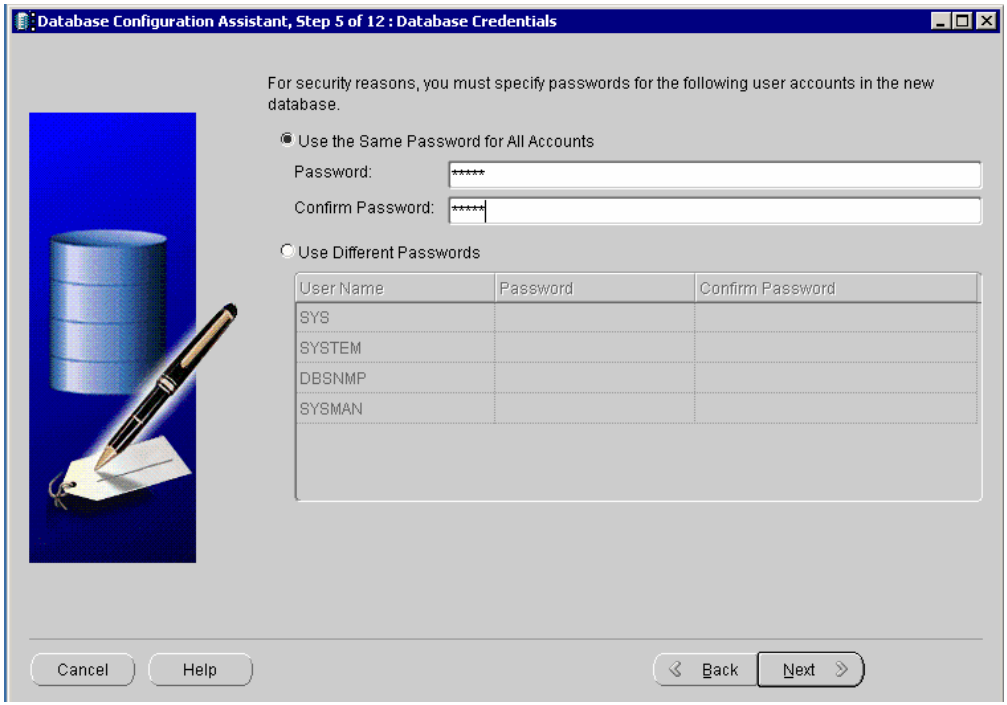
   The database name cannot exceed eight characters or begin with special characters.

8. Click **Next**.




**9.** Select **Configure the Database with Enterprise Manager**.

**10.** Click **Next**.



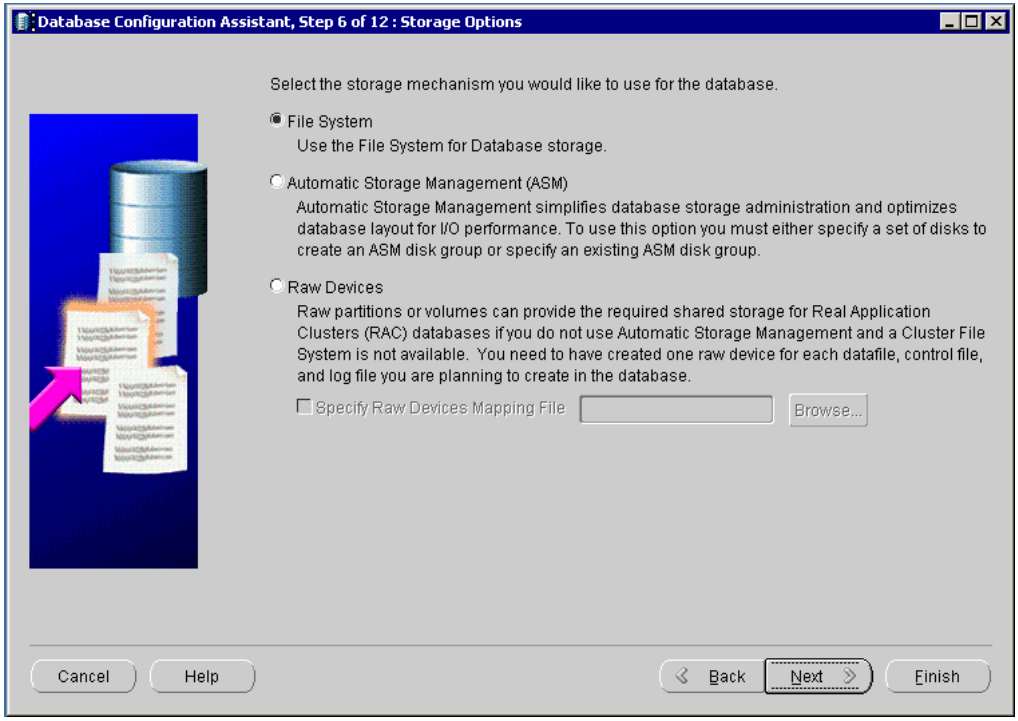

**11.** Select **Use the Same Password for All Accounts**.

**12.** Enter a password for the user account.

Do not use special characters.

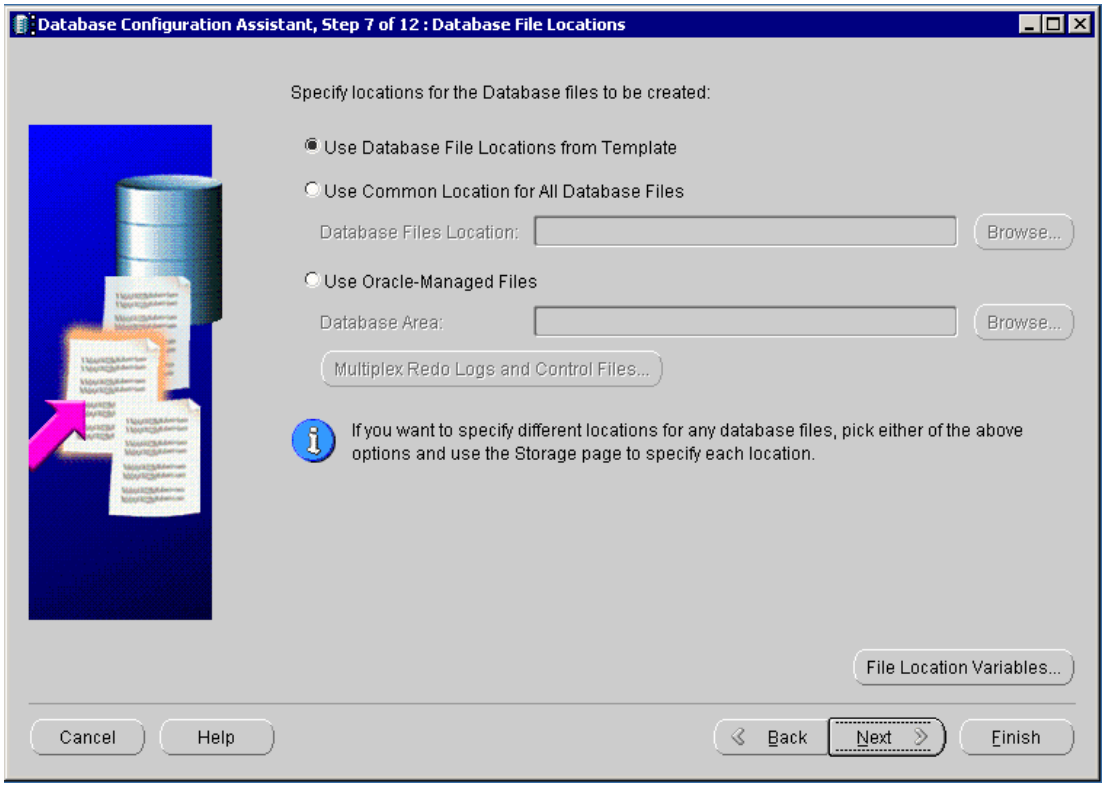
**13.** Confirm the password.

**14.** Click **Next**.



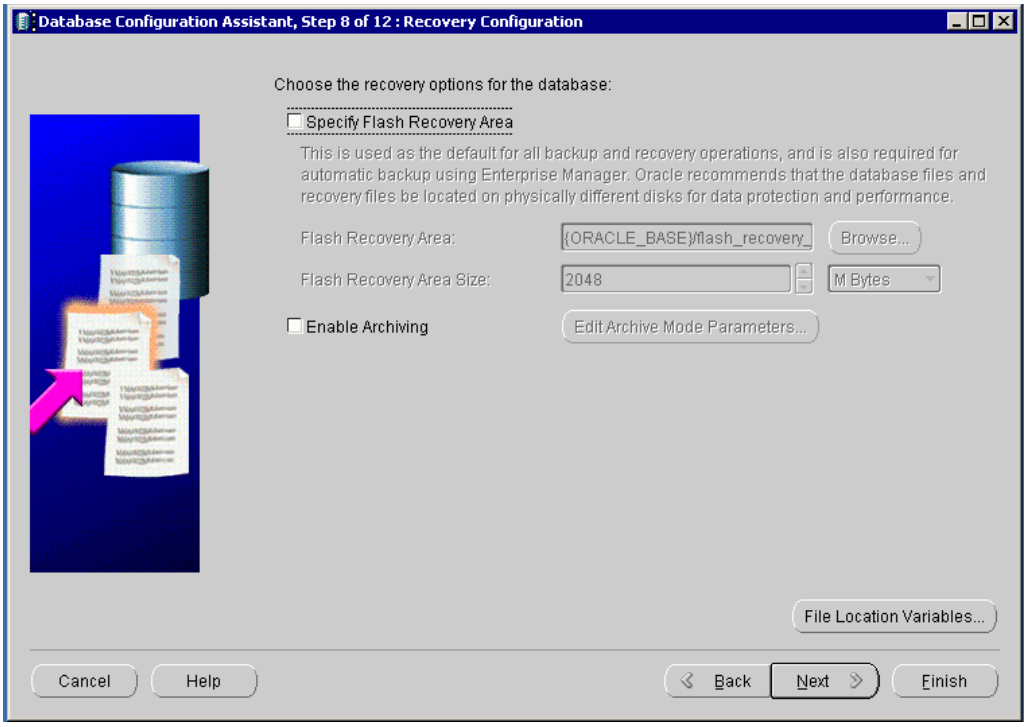

**15.** Select **File System**.

**16.** Click **Next**.



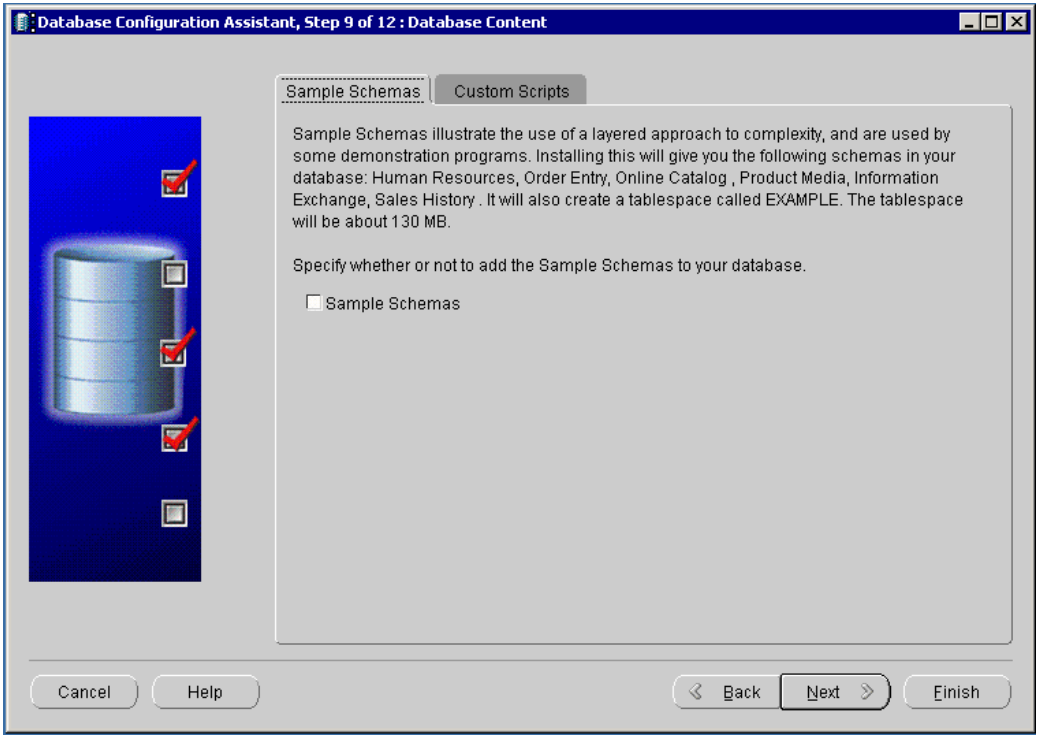

17. Select **Use Database File Locations from Template**.

18. Click **Next**.

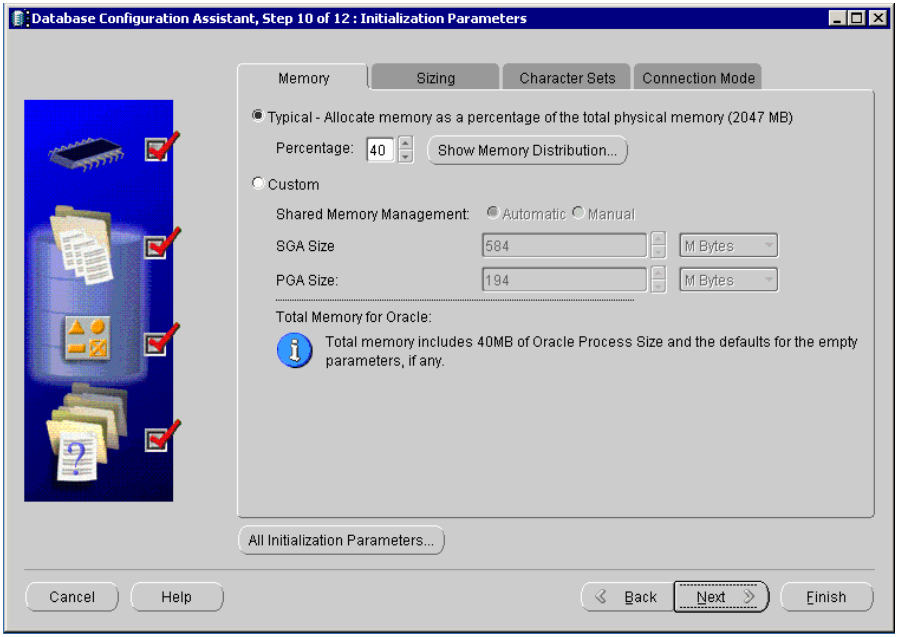



**19.** Contact the database administrator to specify recovery options for the database.

**20.** Click **Next**.



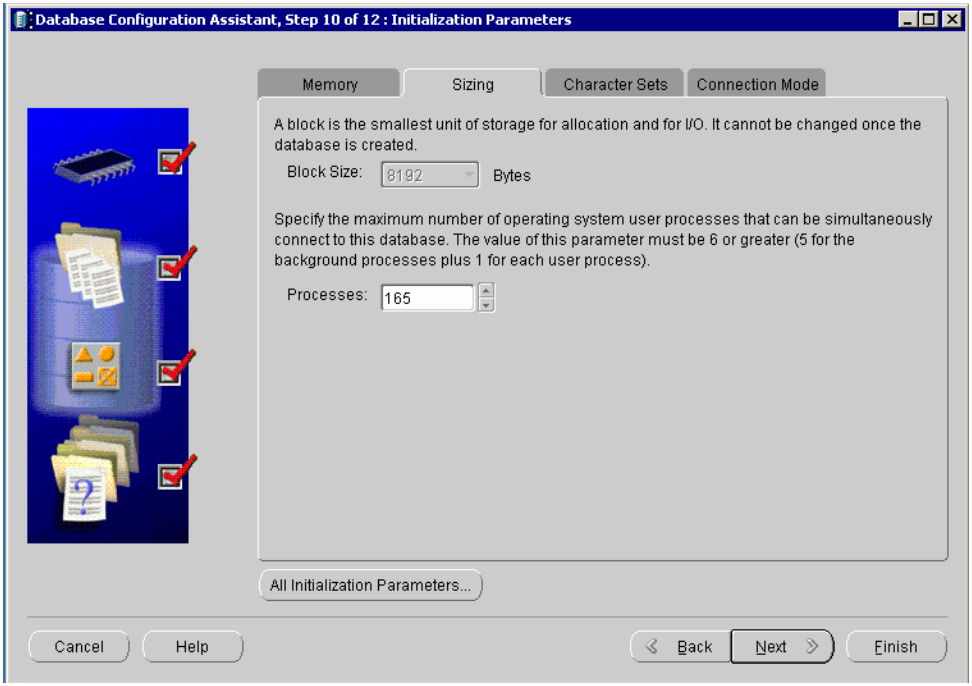

**21.** Click **Next**.




**22.** Select the **Typical** radio button.

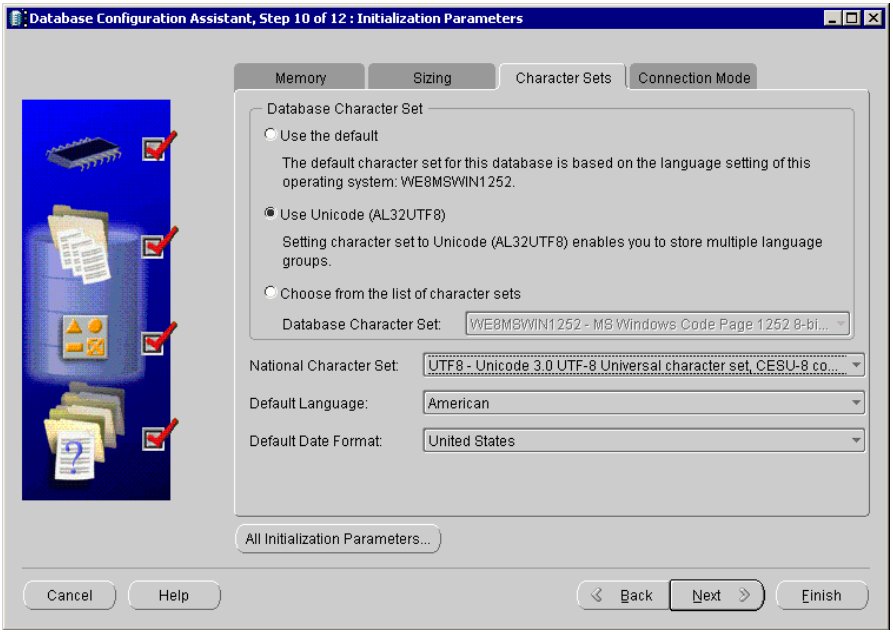
**23.** Contact the database administrator to specify memory options for the database.

**24.** Select the **Sizing** tab.




**25.** In the **Processes** field, enter **165**.

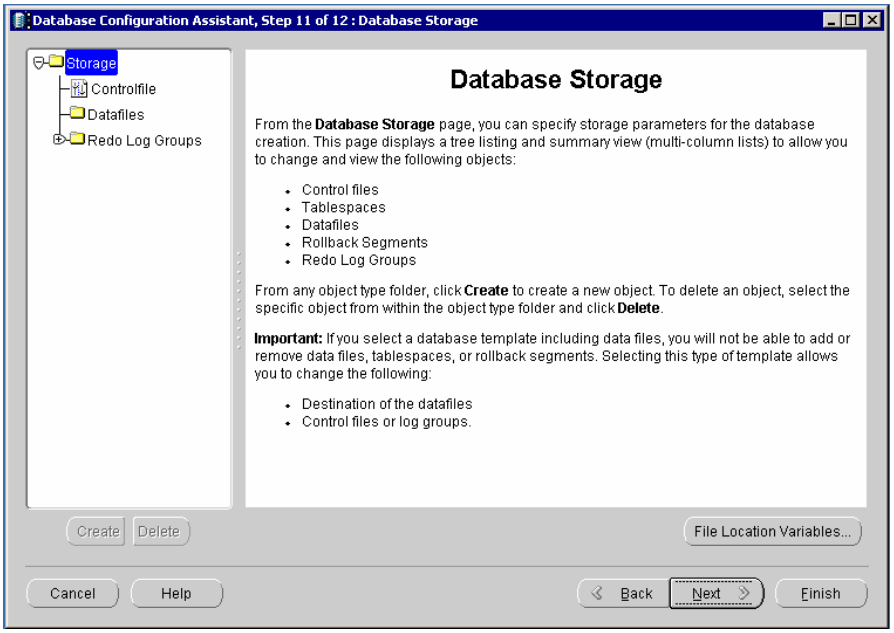
**26.** Select the **Character Sets** tab.



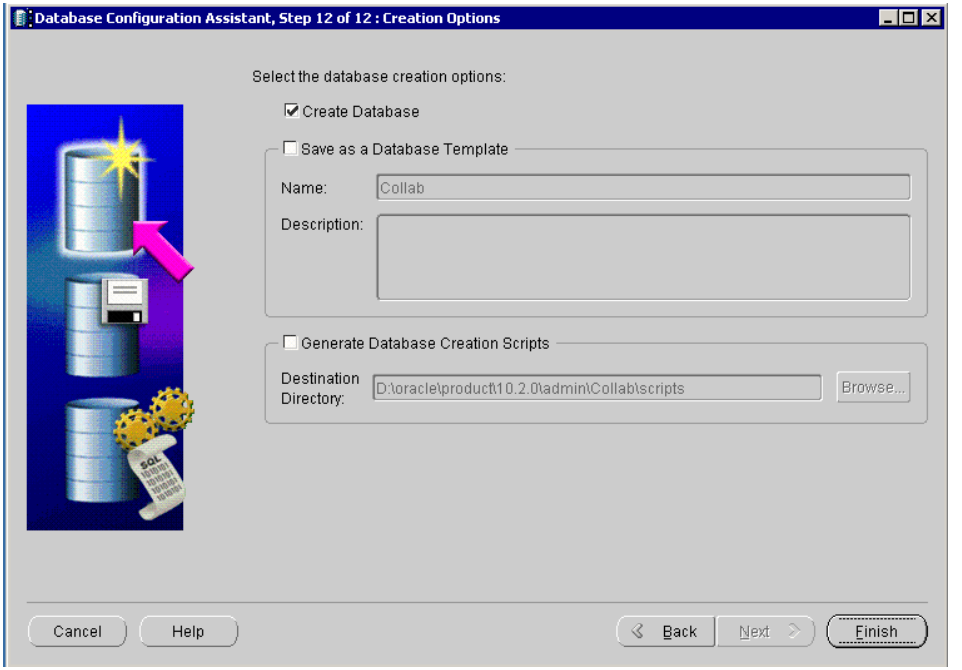

**27.** Select the **Use Unicode (AL32UTF8)** radio button.

**28.** Set the **National Character Set** to **UTF8 - Unicode 3.0 UTF - 8 Universal character set, CESU-8 compliant** .

**29.** Click **Next**.

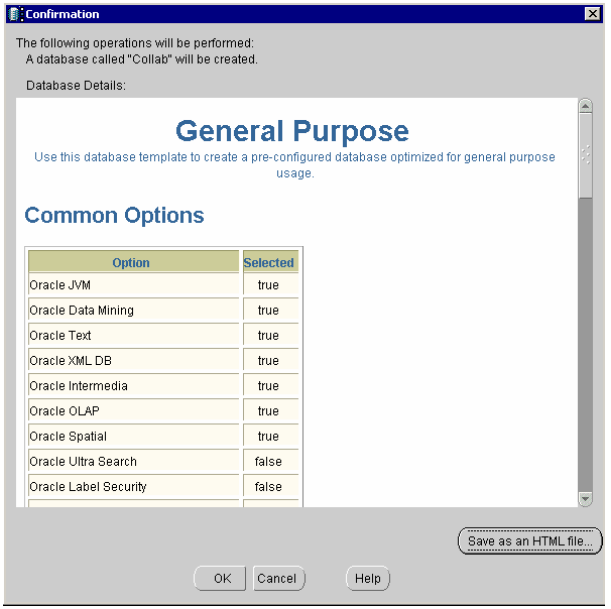



**30.** Click **Next**.

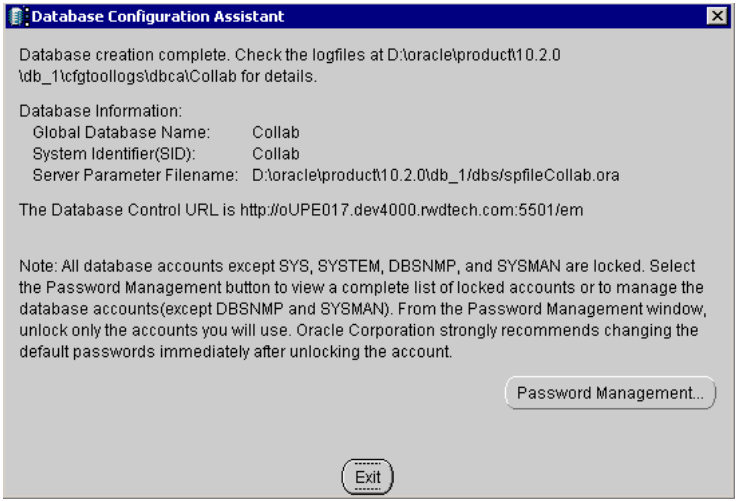



**31.** Select **Create Database**.

**32.** Click **Finish**.




**33.** Click **OK**.




**34.** Click **Exit**.

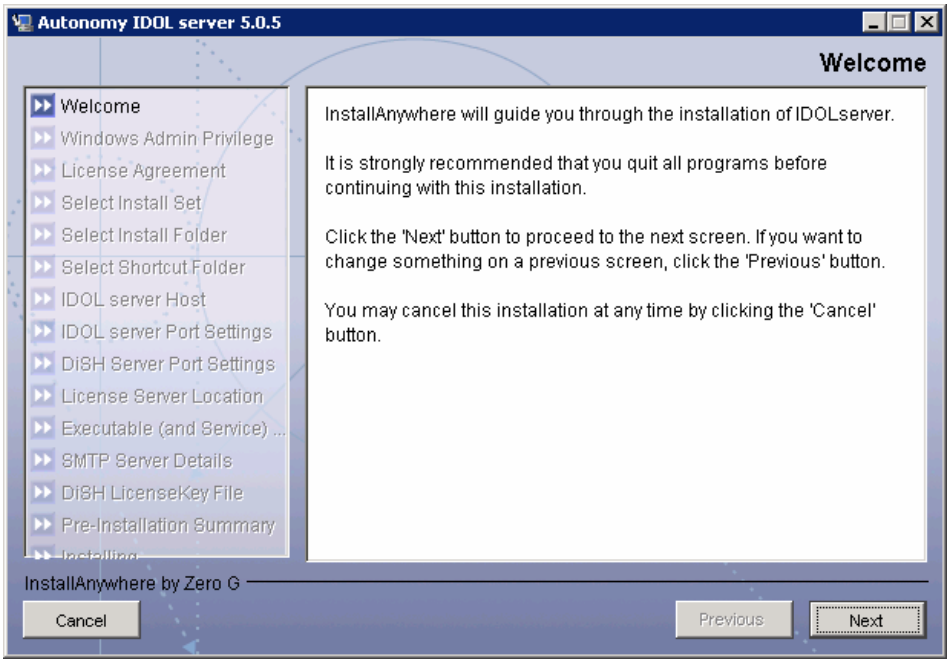
# Installing the Search Server

Before installing the search server, install the database server as described in "Installing the Database Server" on page 22. To ensure proper installation, perform the procedures in this section in the order specified.

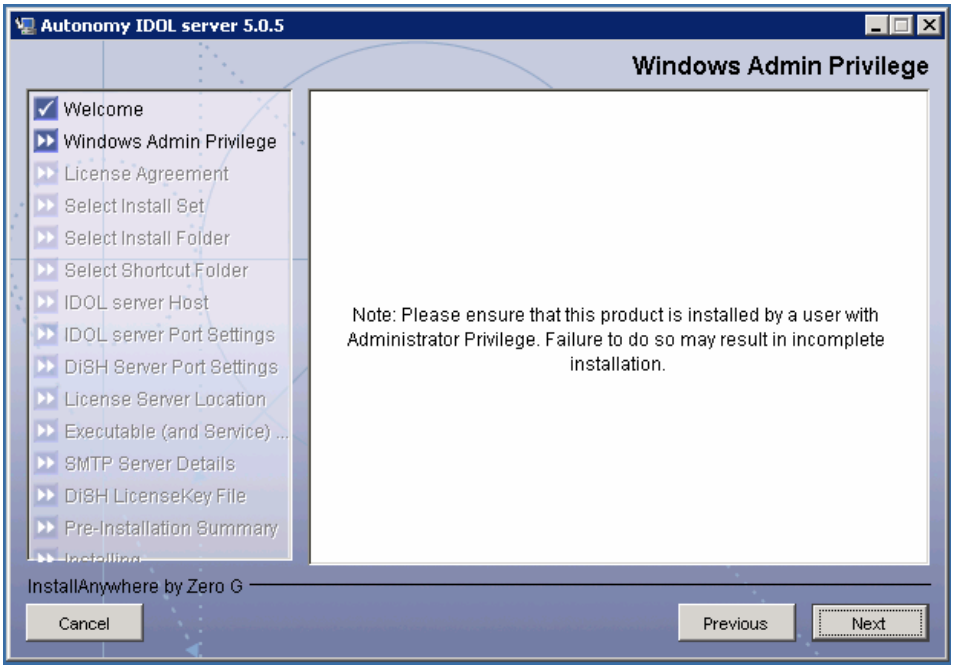
## *Installing the Autonomy IDOL Server*

1. Log into the search server.
2. Locate the installation files on your computer.
3. Double-click on **7.1_Collaboration_Search_Server_MSWin.exe** to launch the executable.
4. Click **Run**.

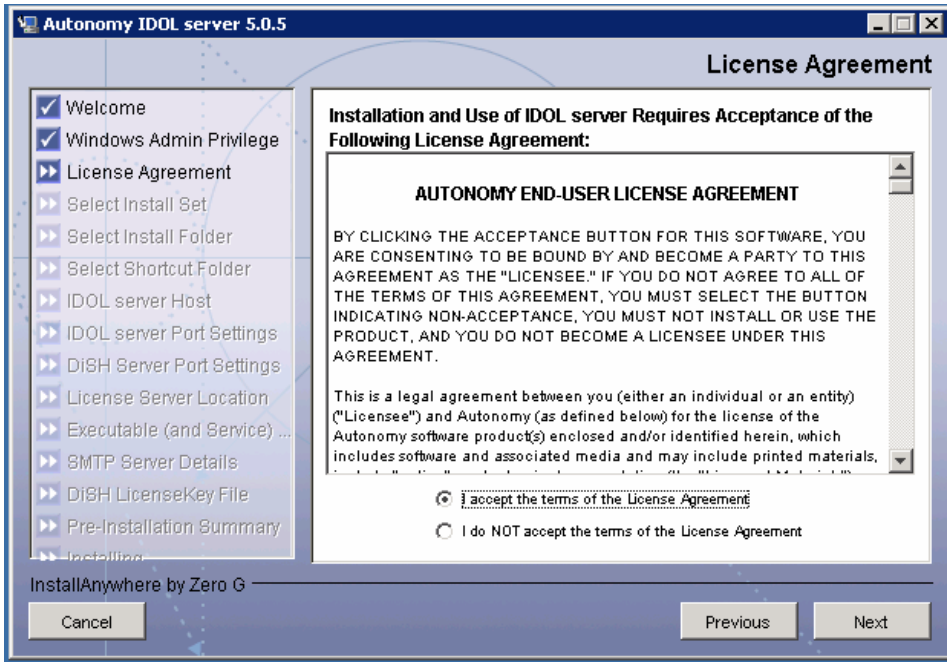
5. Click **OK**.


Autonomy IDOL server 5.0.5
Welcome
Welcome
Windows Admin Privilege
License Agreement
Select Install Set
Select Install Folder
Select Shortcut Folder
IDOL server Host
IDOL server Port Settings
DiSH Server Port Settings
License Server Location
Executable (and Service) ...
SMTP Server Details
DiSH LicenseKey File
Pre-Installation Summary
InstallAnywhere will guide you through the installation of IDOLserver.
It is strongly recommended that you quit all programs before continuing with this installation.
Click the 'Next' button to proceed to the next screen. If you want to change something on a previous screen, click the 'Previous' button.
You may cancel this installation at any time by clicking the 'Cancel' button.
InstallAnywhere by Zero G
Cancel
Previous
Next

**6.** Click **Next**.

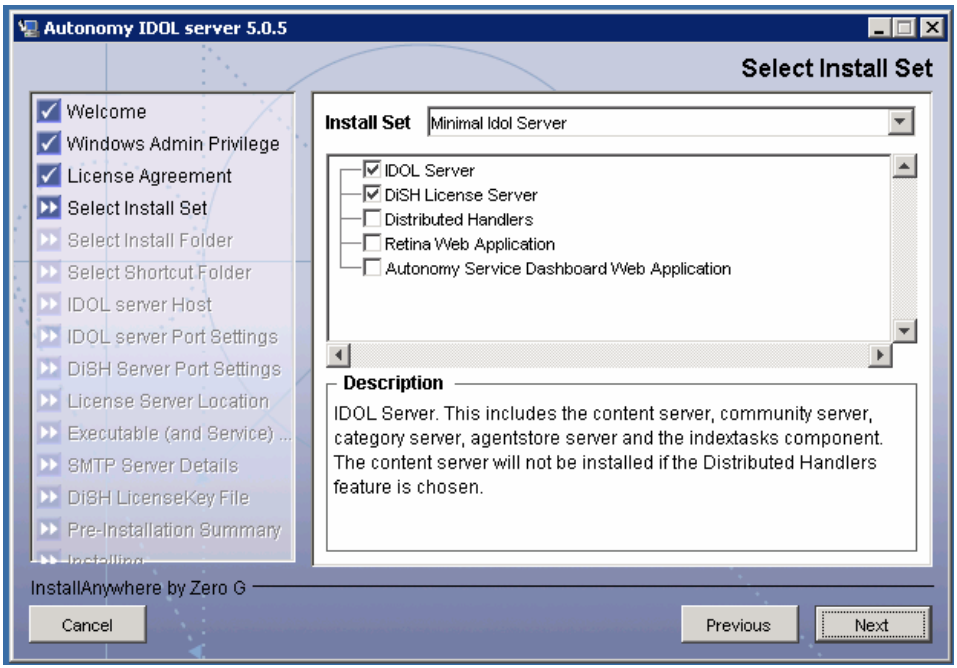

Autonomy IDOL server 5.0.5
Windows Admin Privilege
Welcome
Windows Admin Privilege
License Agreement
Select Install Set
Select Install Folder
Select Shortcut Folder
IDOL server Host
IDOL server Port Settings
DiSH Server Port Settings
License Server Location
Executable (and Service) ...
SMTP Server Details
DiSH LicenseKey File
Pre-Installation Summary
Note: Please ensure that this product is installed by a user with Administrator Privilege. Failure to do so may result in incomplete installation.
InstallAnywhere by Zero G
Cancel
Previous
Next

7. Click **Next**.



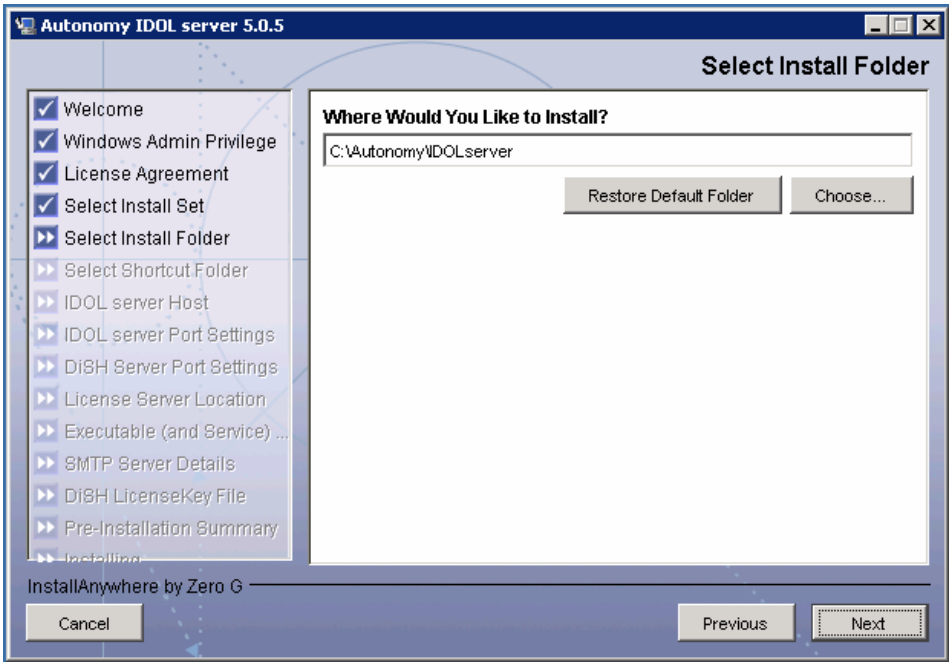

8. Review the license agreement, and select **I accept the terms of the License Agreement** to accept the agreement.

9. Click **Next**.



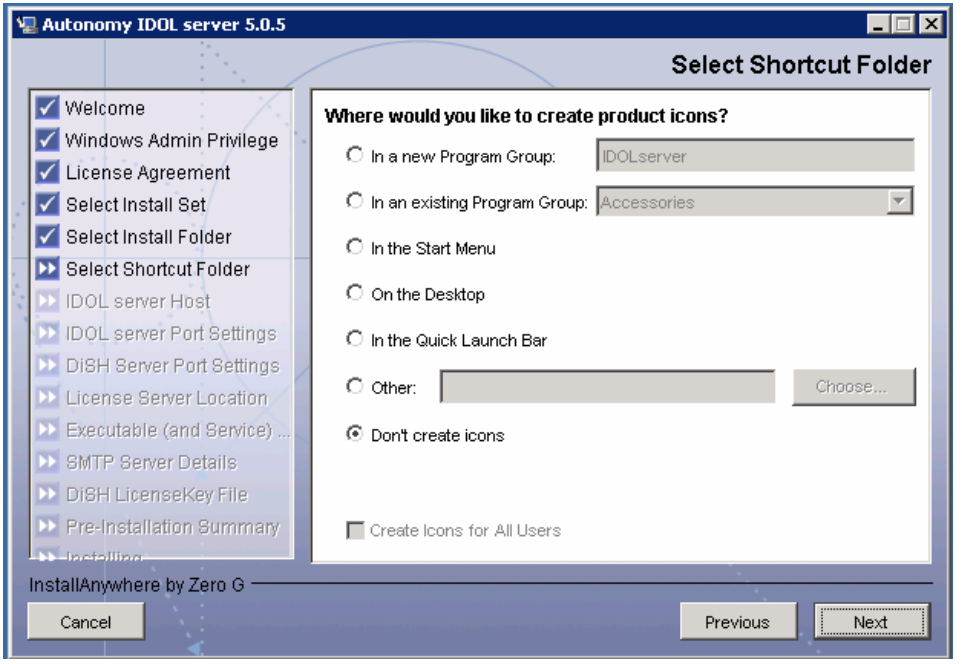

**10.** Select **IDOL Server** and **DiSH License Server**.

**11.** Click **Next**.



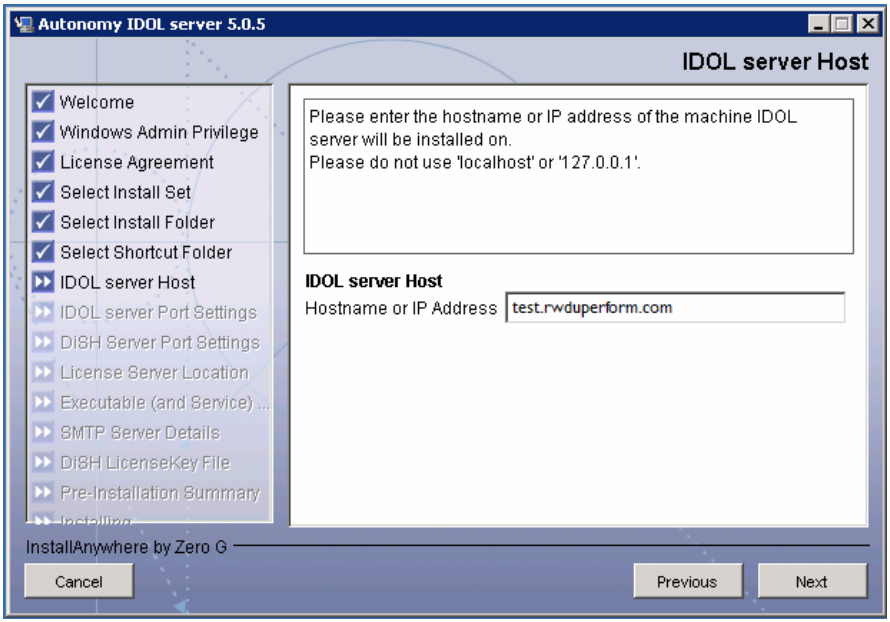

**12.** Browse to the folder install location.

**13.** Click **Next**.




**14.** Select **Don't create icons**.

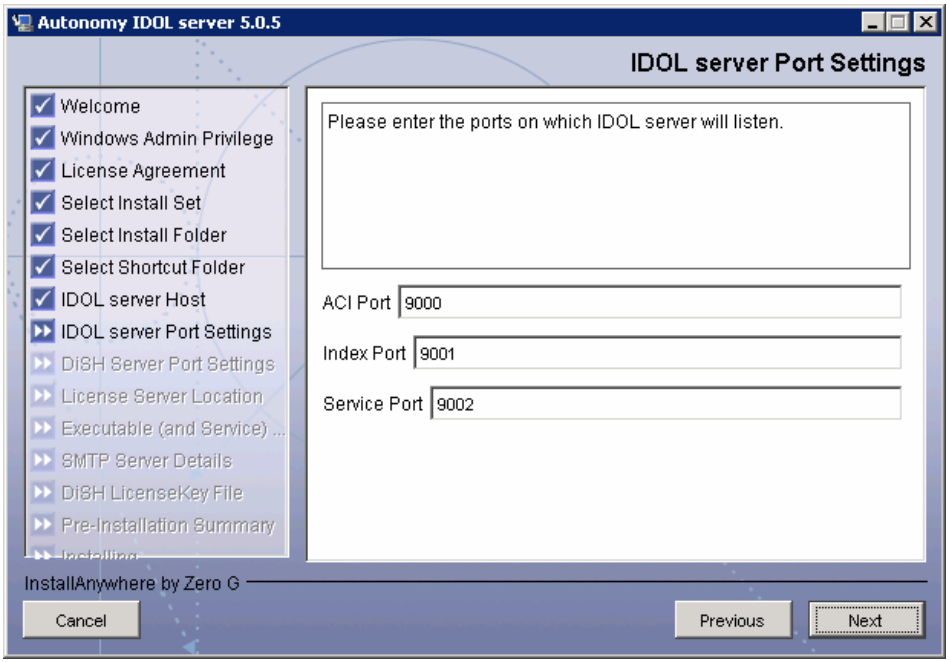
**15.** Click **Next**.




**16.** Enter the full DNS hostname (preferred) or static IP Address of the search server.

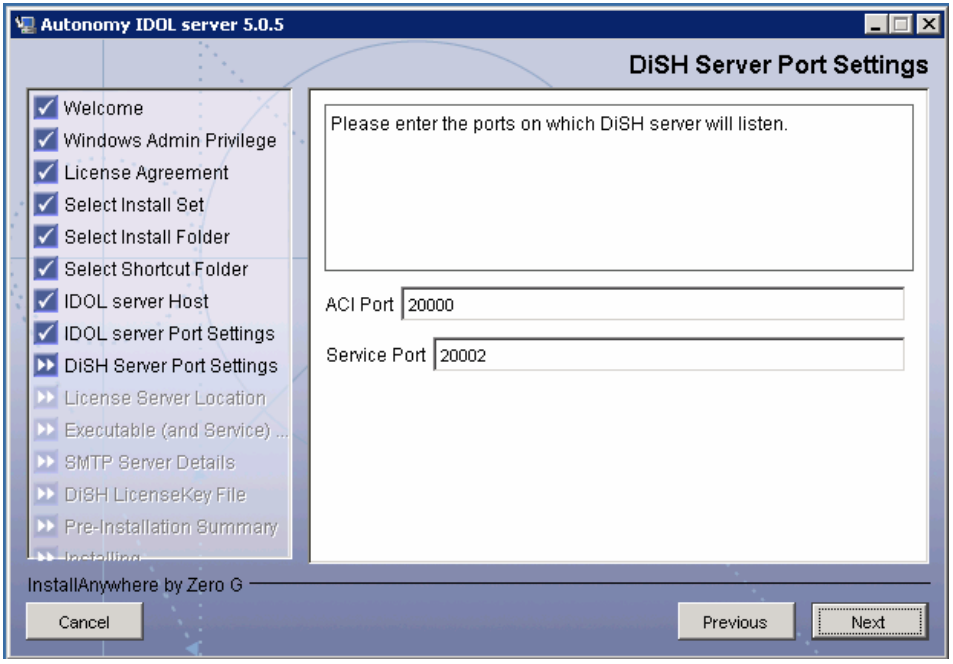
Do not use LOCALHOST or 127.0.0.1. If you are using an IP address, ensure you have a static IP address.

**17.** Click **Next**.



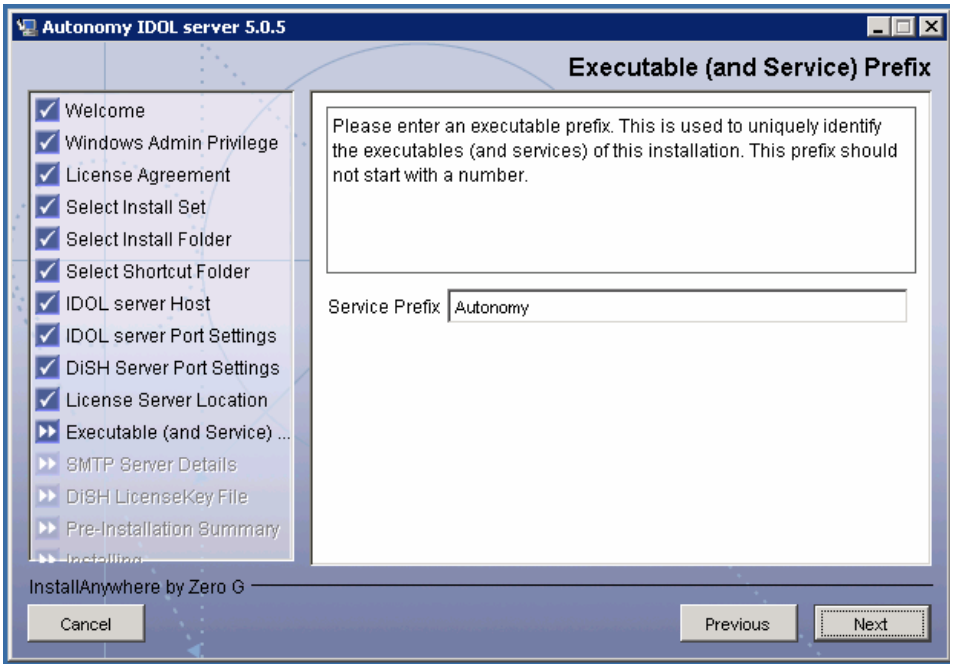

Verify that no other service or process is running on these ports.

**18.** Click **Next**.

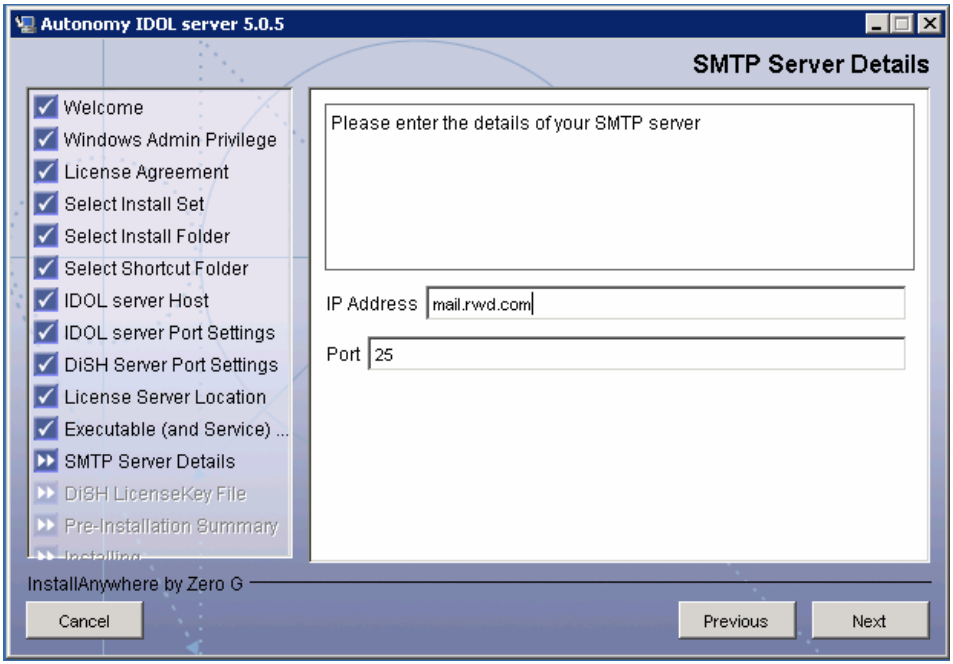



Verify that no other service or process is running on these ports.

**19.** Click **Next**.




**20.** Click **Next**.

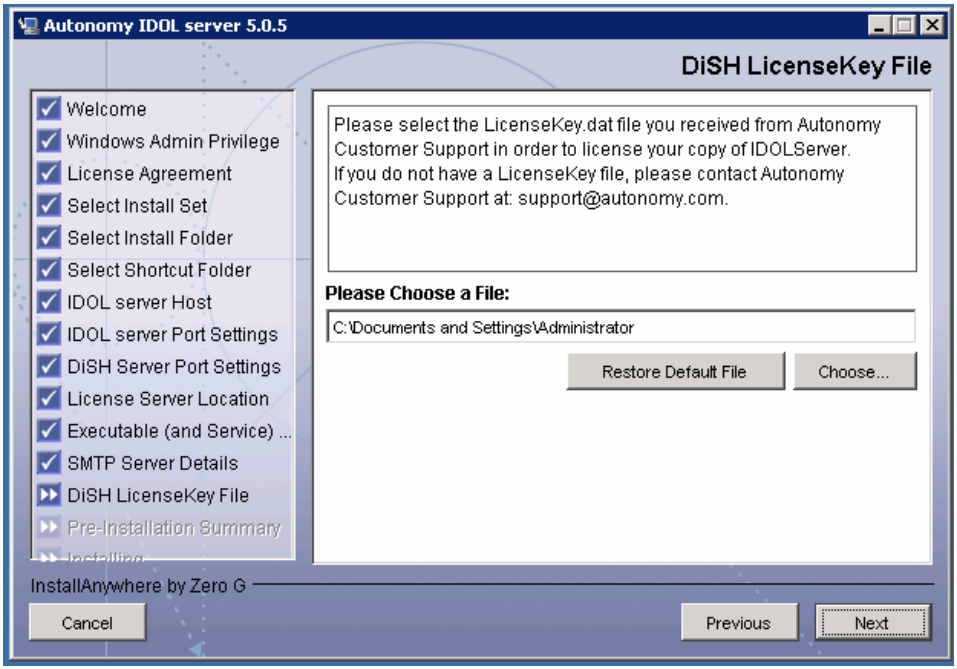



**21.** To enable notification functionality, specify the static IP address or hostname of a valid SMTP server.

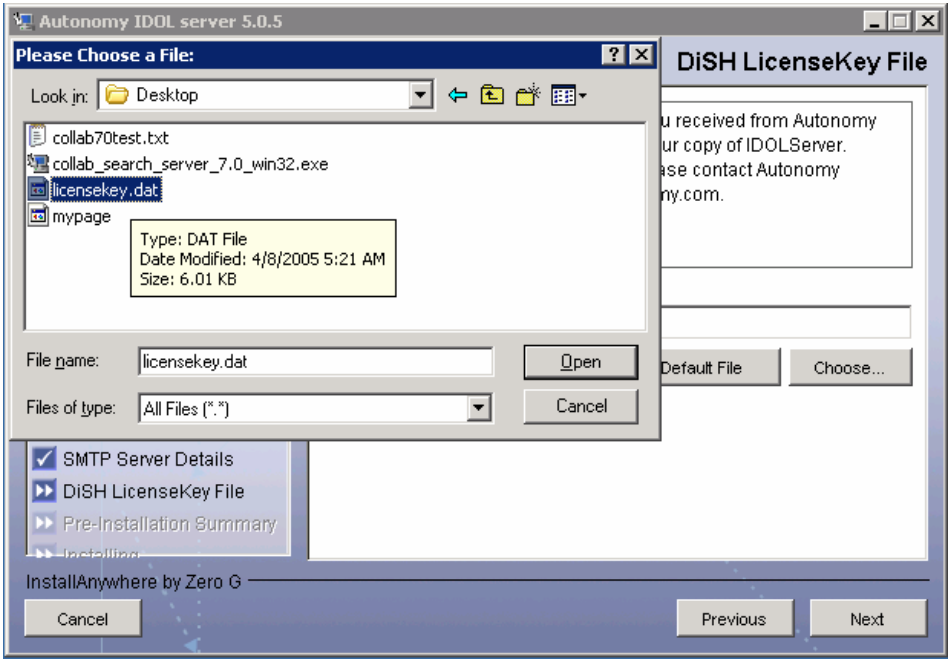
**22.** Enter the port for your SMTP server. The default is port 25.

Verify that virus scanners are not blocking port 25.

**23.** Click **Next**.




**24.** Click **Choose...** .

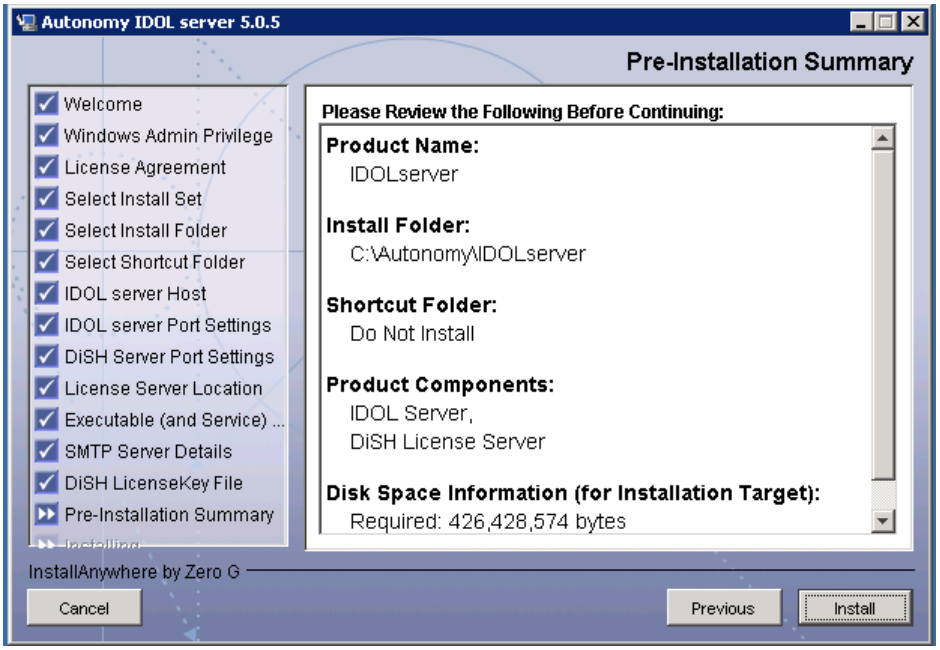



**25.** Browse to the licensekey.dat file location. (The license file is provided with the Search Server Installer.)

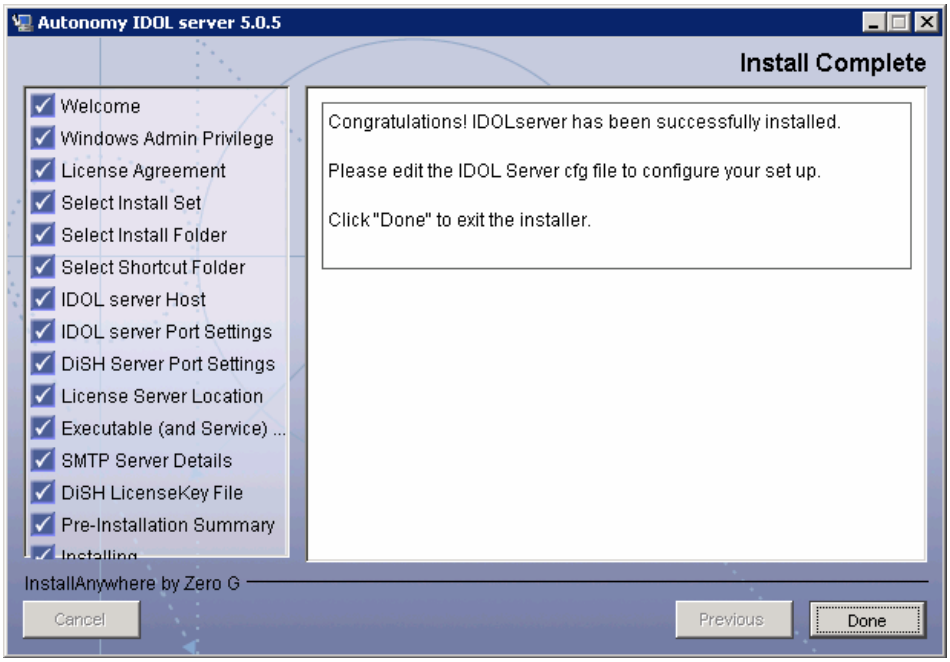
You must select the correct path to the license file or you will have to reinstall.

**26.** Click **Open**.

**27.** Click **Next**.




**28.** Click **Install**.



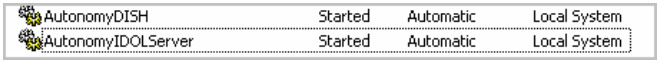

29. Click **Done**.

## *Verifying the Autonomy IDOL Server Install*

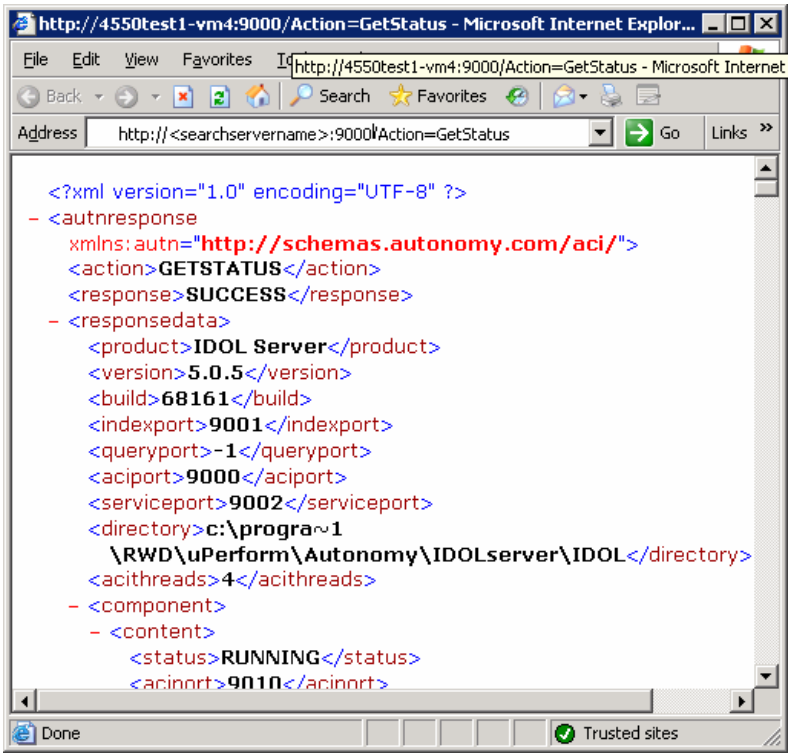
1. Select **START > CONTROL PANEL**.
2. Select **Administrative Tools**.
3. Select **Services**.
4. Right-click on the **AutonomyDISH** service.
5. Select **Start**.

Starting this service will, in turn, start the **AutonomyIDOLServer** service. This process may take several minutes.

6. Confirm the **AutonomyDISH** service automatically started **AutonomyIDOLServer** as depicted below:

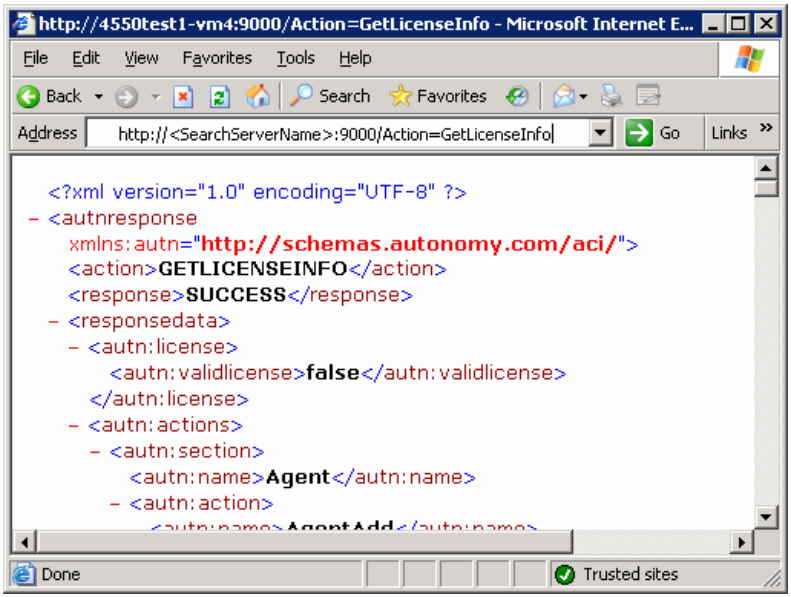



7. Open **http://<searchservername>:9000/Action=GetStatus** in Internet Explorer. (For example: **http://4550lapp:9000/Action=GetStatus**.)



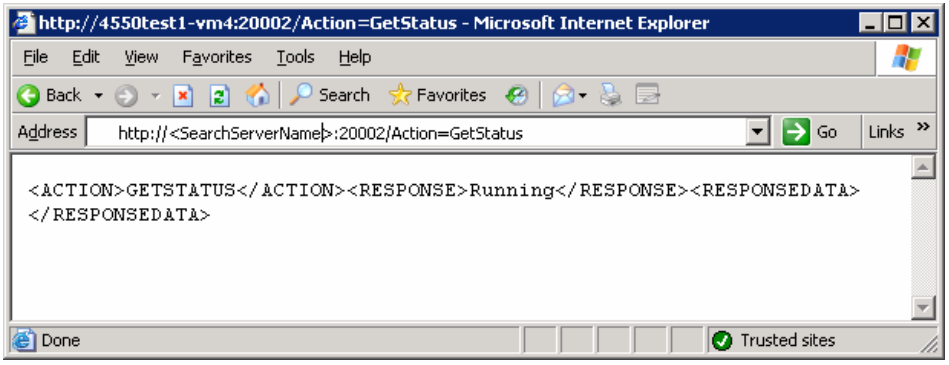

8. Verify that the XML displayed does not include errors.

9. Open **http://<searchservername>:9000/Action=GetLicenseInfo** in Internet Explorer.




**10.** Verify that the XML displayed includes the correct licensing information. If there are errors, you must uninstall and reinstall.

**11.** Open **http://<searchservername>:20002/Action=GetStatus** in Internet Explorer.




**12.** Verify that the XML displayed does not include errors.

# Installing the Application Server

Before installing the application server, install the database server and search server as described in "Installing the Database Server" on page 22 and "Installing the Search Server" on page 58. To ensure proper installation, perform the procedures in this section in the order specified.

## Executing the Application Server Installation

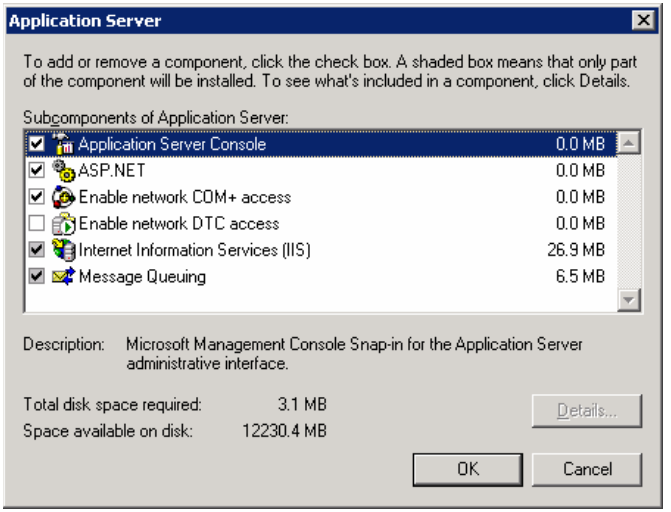
Before you can install the application server, you must first install and verify Microsoft Message Queuing, and configure the website folder in Internet Information Systems (IIS). Refer to the following subsections for detailed information.

### *Installing and Verifying Message Queuing and Configuring IIS*

1. Select **START > CONTROL PANEL > ADD/REMOVE PROGRAMS > ADD/REMOVE WINDOWS COMPONENTS**.

2. Double-click on **Application Server**.

You must have domain-level access in order to enable message queuing.




3. Ensure **Message Queuing** is selected. (If not selected, select **Message Queuing** and click **Details...**. Select **Common**, click **OK**, click **Next**, and click **Finish**.)

4. Ensure that **ASP.NET** is selected.

5. Click **OK**.

6. Click **Cancel**.

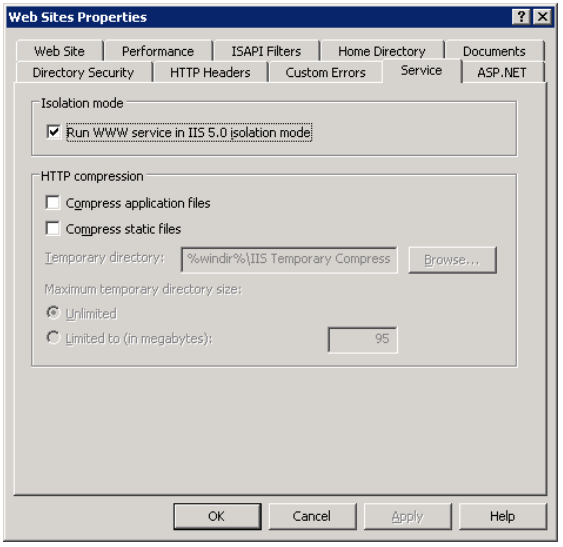
7. Select **START > CONTROL PANEL > ADMINISTRATIVE TOOLS > INTERNET INFORMATION SERVICES (IIS) MANAGER**.

8. Select **(LOCAL COMPUTER) > WEB SITES**.

9. Right-click on **Web Sites**.

10. Select **Properties**.

11. Click the **Service** tab.




12. Select the **Run WWW service in IIS 5.0 isolation mode** checkbox.

13. Click **OK**.

14. If the isolation mode was not previously selected, click **Yes**.

15. Select **START > CONTROL PANEL > ADMINISTRATIVE TOOLS > INTERNET INFORMATION SERVICES**.

16. Select **Web Service Extensions**.

17. Ensure that **ASP.NET V2.0.50727** is set to **Allowed**.

18. Select **START > CONTROL PANEL > ADD OR REMOVE PROGRAMS**.

19. Ensure Microsoft .NET Framework v2.0 and Microsoft J# Redistributable Package v2.0 are installed.

20. Select **START > MY COMPUTER > MANAGE**.

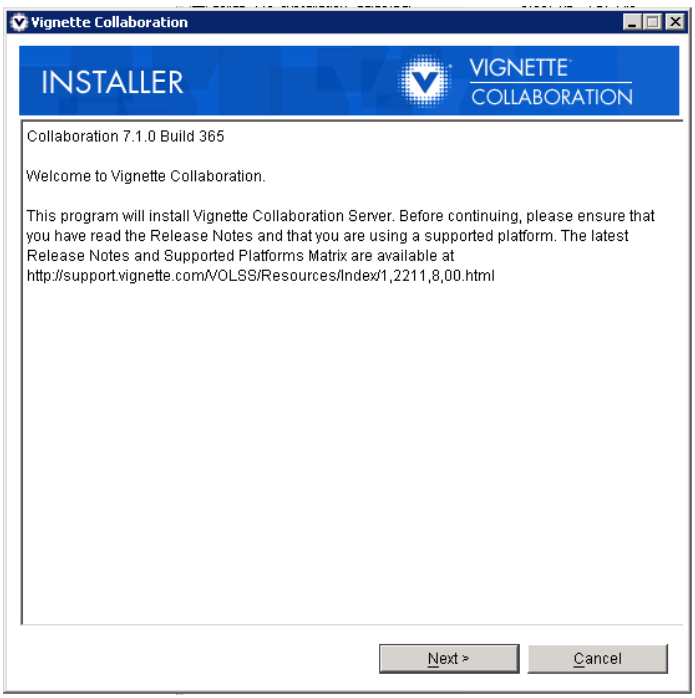
21. Click **Services and Applications.**

22. Ensure Microsoft Message Queueing is installed.

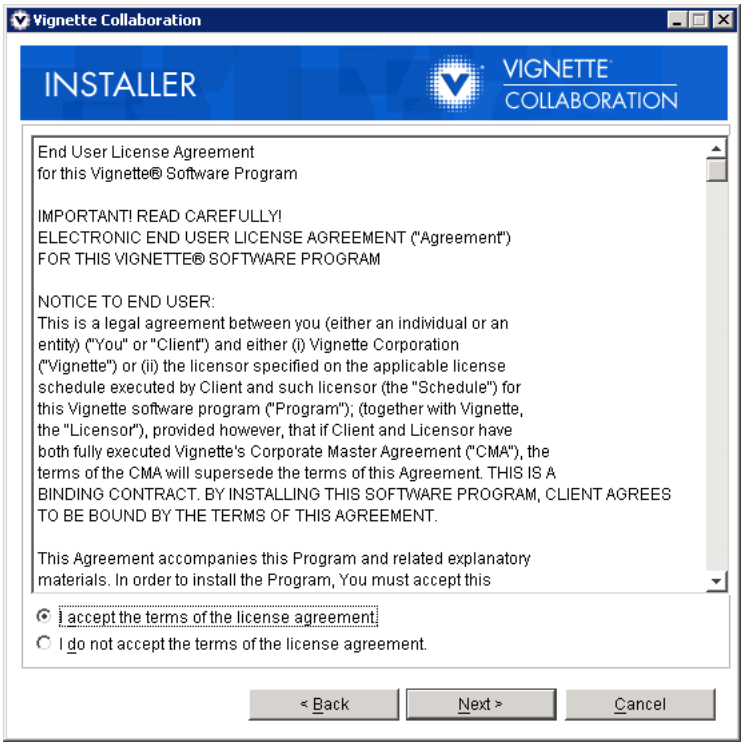
### *Installing the Vignette Software*

If you are using Microsoft SQL Server, you must create a new blank database before performing this procedure. Refer to "Creating a Blank Database for Microsoft SQL Server" on page 23 for more information.

1. Open Windows Explorer using the key command **Windows+E**.
2. Create a blank installation folder called **RWDuPerform** in the desired location.
3. Locate the installation files on your computer.
4. Double-click **7.1.0.365-Collaboration-MSWin.exe** to start the installation.
5. Click **Run**.

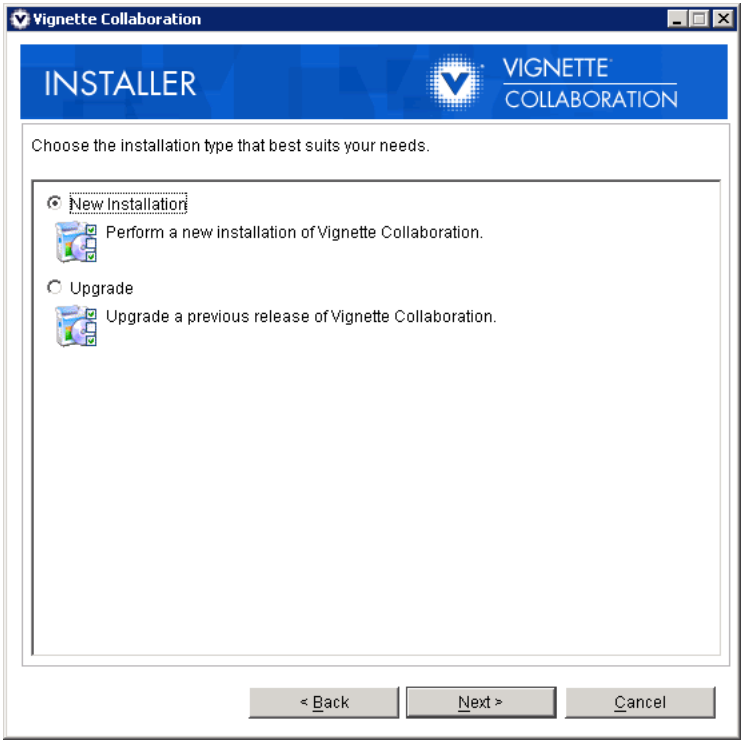



6. Click **Next**.



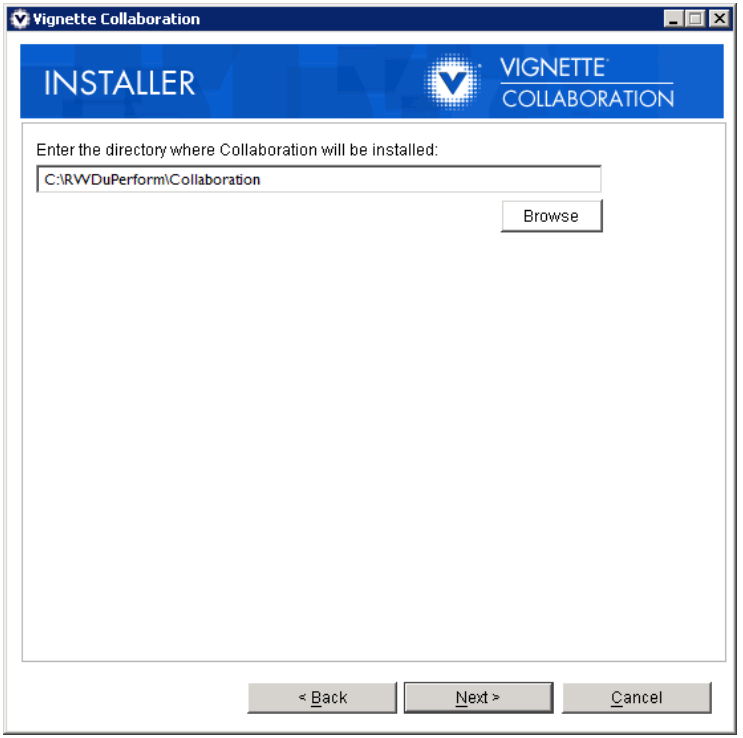

7. Review the agreement, and select **I accept the terms of the license agreement** to proceed.

8. Click **Next**.




9. Select **New Installation**.

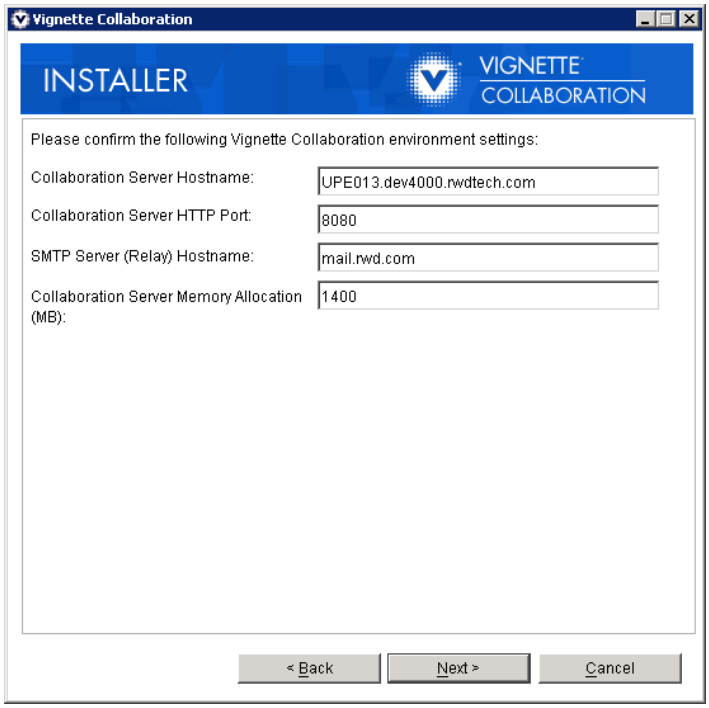
10. Click **Next**.




**11.** Enter or browse to the installation folder you created in Step 2 of this procedure.

Ensure that you retain **\Collaboratio**n in the folder path.

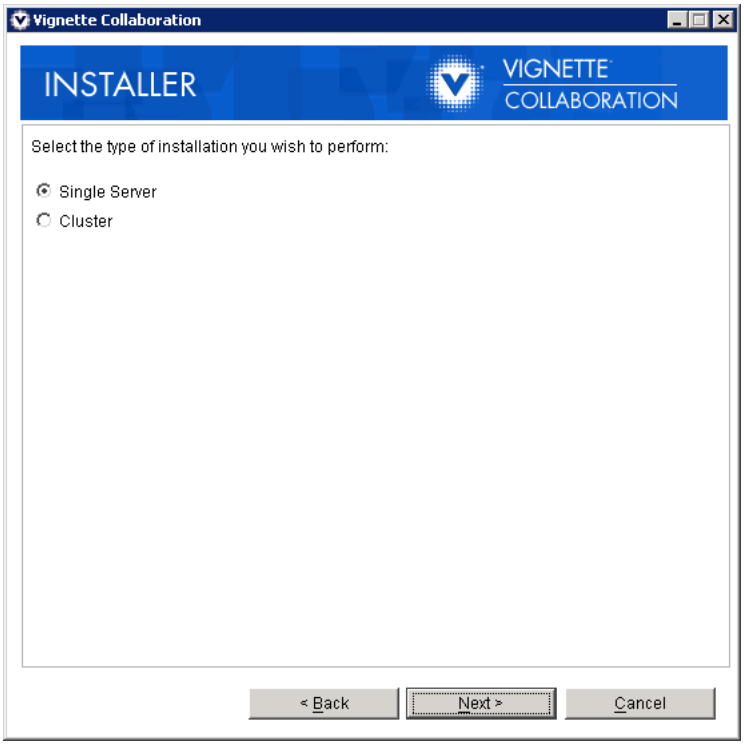
**12.** Click **Next**.




**13.** Complete the following fields:

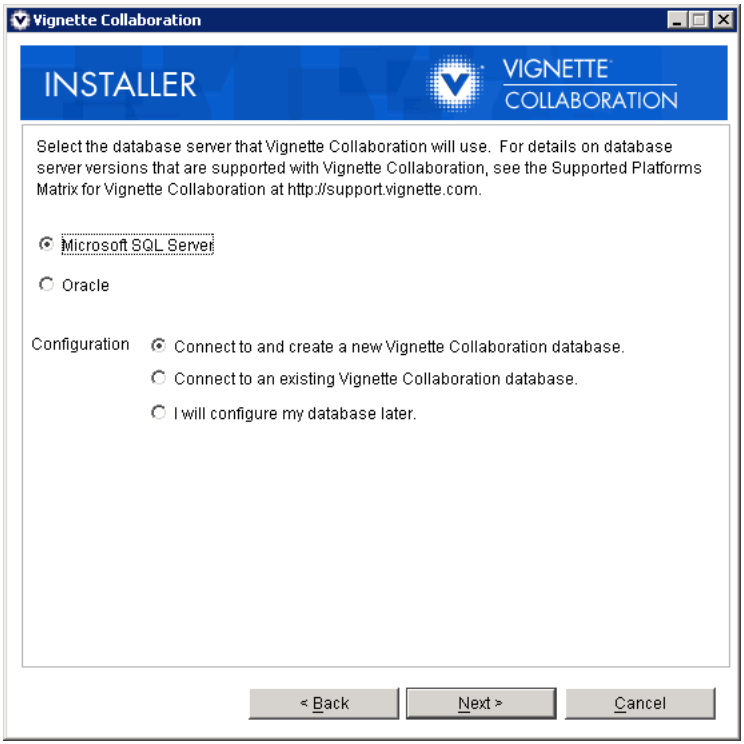
| Field | Description |
|---|---|
| Collaboration Server Hostname | Enter the full DNS name. This is a required field.<br>Examples: UPE013.dev4000.rwdtech.com<br>OR<br>test.rwduperform.com |
| Collaboration Server HTTP Port | This is a required field.<br>RWD recommends specifying port 8080 if it is unused. |
| SMTP Server (Relay) Hostname | This is a required field.<br>Example: mail.rwd.com |
| Collaboration Server Memory Allocation (MB) | This is an optional field.<br>RWD recommends specifying half of the physical memory of the server. |

**14.** Click **Next**.




15. Select **Single Server**.

16. Click **Next**.

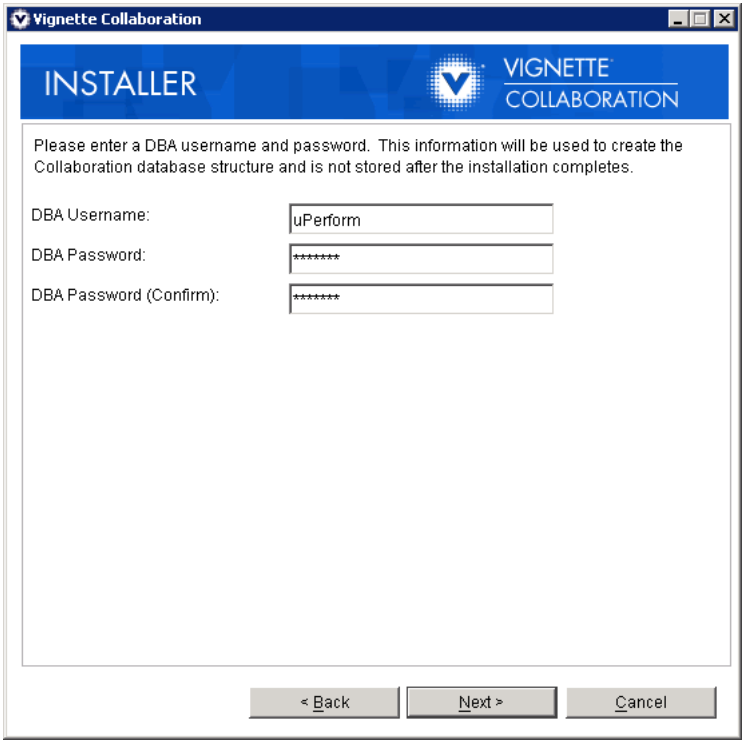



**17.** Perform one of the following options:

| If You Want To | Then |
|---|---|
| Install the Vignette Software on Microsoft SQL Server | Select the **Microsoft SQL Server** radio button. |
| Install the Vignette Software on Oracle | Select the **Oracle** radio button. |

**18.** If you are performing a clean installation, select **Connect to and create a new Vignette Collaboration database**. If you are connecting to an existing database, select **Connect to an existing Vignette Collaboration database**.

**19.** Click **Next**.

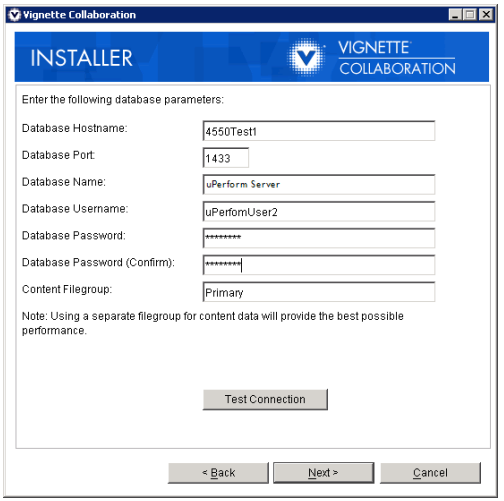


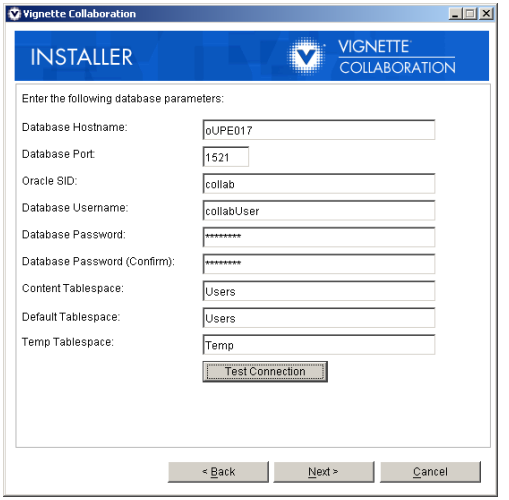

**20.** Complete the following fields:

| Field | Description |
|---|---|
| DBA Username | This is a required field.<br>Enter the name of the system administrator you created in "Installing the Search Server" on page 58. |
| DBA Password | This is a required field.<br>Enter a password for the new account. The password is case sensitive. An alphanumeric combination is recommended. |
| DBA Password (Confirm) | This is a required field.<br>Confirm the password entered. |

**21.** Click **Next**.

The following images reflect Microsoft SQL Server and Oracle.




**22.** Perform one of the following options:

| If You Want To | Then |
|---|---|
| Install Vignette in the Microsoft SQL Server environment | Go to Step 23. |
| Install Vignette in the Oracle environment | Go to Step 25. |

**23.** Complete the following fields:

| Field | Description |
|---|---|
| Database Hostname | Enter the full DNS name. This is a required field. |
| Database Port | Enter the database port. This is a required field. |
| Database Name | Enter the name of an empty Microsoft SQL Server database. The database name must be unique. Semicolons are not permissible. |

| Field | Description |
|---|---|
| Database Username | This is a required field. The database username must be unique.<br> This is not the Vignette or SQL user. Semicolons are not permissible. |
| Database Password | This is a required field.<br>Enter a password for the new account. The password is case sensitive. An alphanumeric combination is recommended. Do not use special characters. |
| Database Password (Confirm) | This is a required field.<br>Confirm the password entered. |
| Content Filegroup | This is a required Microsoft SQL field.<br>Enter **Primary** as the name of the content filegroup. |

**24.** Go to Step 26.

**25.** Complete the following fields:

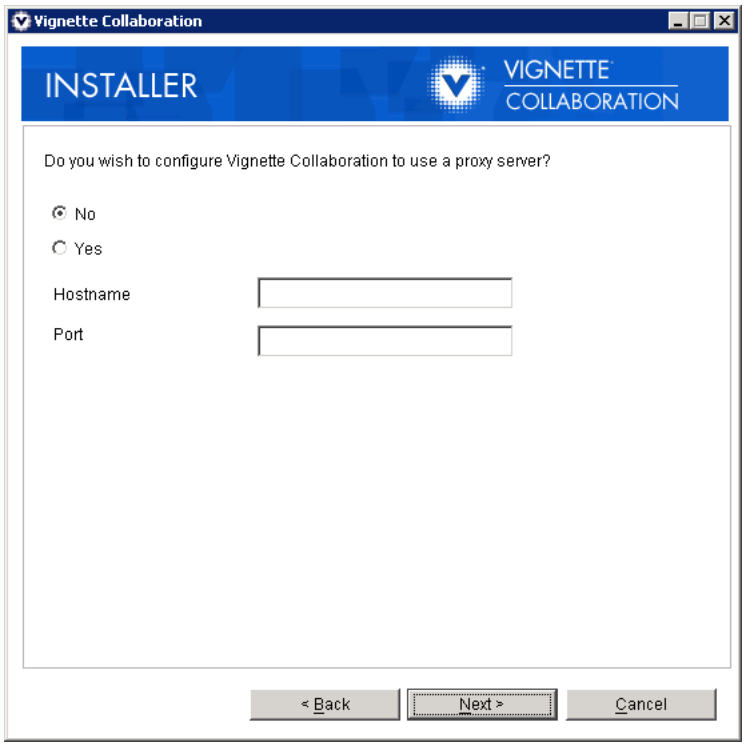
| Field | Description |
|---|---|
| Database Hostname | Enter the full DNS name. This is a required field. |
| Database Port | Enter the database port. This is a required field. |
| Oracle SID | Enter the name of an empty Oracle database. The database name must be unique and cannot begin with a number. Special characters are not permitted. |
| Database Username | This is a required field. The database username must be unique.<br> This is not the Vignette or Oracle user. Semicolons are not permissible. |
| Database Password | This is a required field.<br>Enter a password for the new account. The password is case sensitive. An alphanumeric combination is recommended. Do not use special characters. |

| Field | Description |
|---|---|
| Database Password (Confirm) | This is a required field.<br>Confirm the password entered. |
| Content Tablespace | This is a required Oracle field.<br>Confirm the data entered. |
| Default Tablespace | This is a required Oracle field.<br>Confirm the data entered. |
| Temp Tablespace | This is a required Oracle field.<br>Confirm the data entered. |

**26.** Click **Test Connection** to verify your setup.

This action does not populate the database but tests that a connection to the server is available. If the connection fails, confirm the hostname, database name, and database administrator username and password.

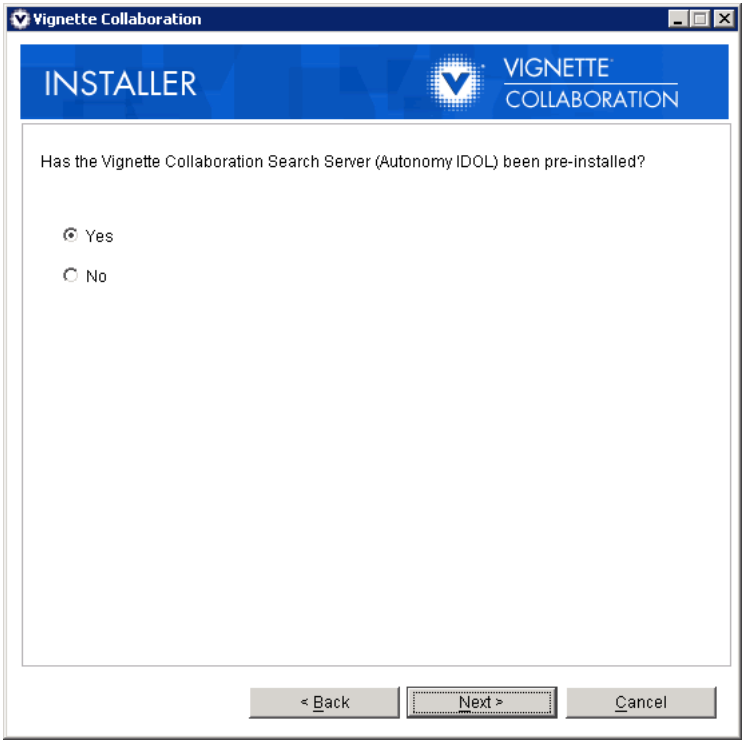
**27.** Click **Next**.




**28.** Select **No**.

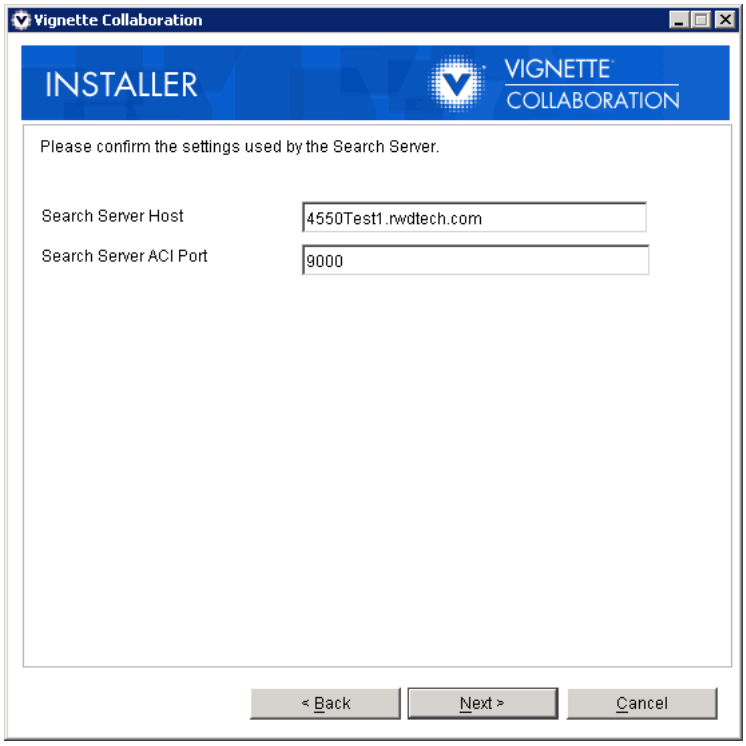
If you are using a proxy server to allow this server access to external resources (for example, the Internet, a LAN), you must select **Yes** and complete the proxy information.

**29.** Click **Next**.




**30.** Select **Yes**.

**31.** Click **Next**.

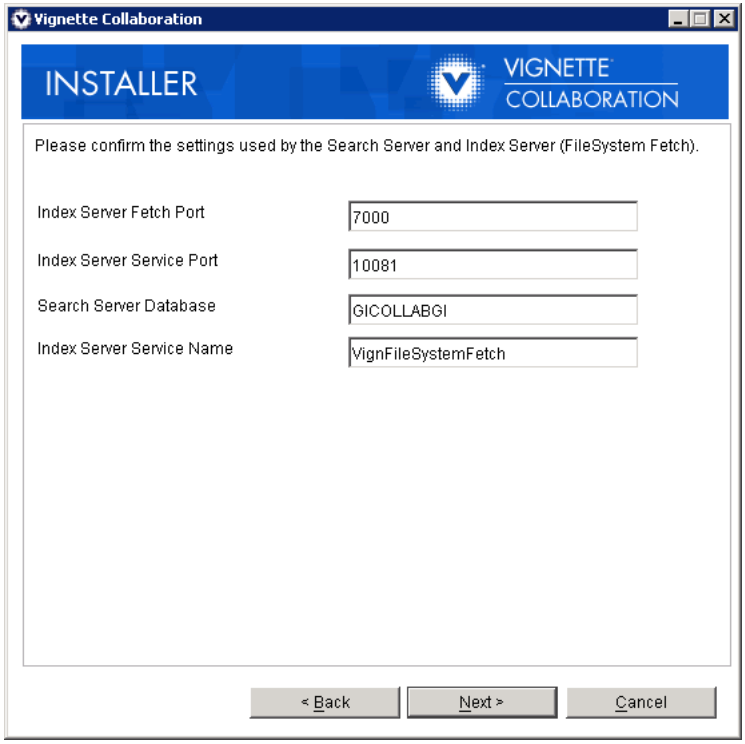



Verify that this port matches the port specified during the search server installation.

**32.** Complete the following fields:

| Field | Description |
|---|---|
| Search Server Host | Enter the DNS name. This is a required field.<br>Examples: 4550Test1.rwdtech.com<br>OR<br>demo.rwduperform.com |
| Search Server ACI Port | This is a required field.<br>The default is 9000. |

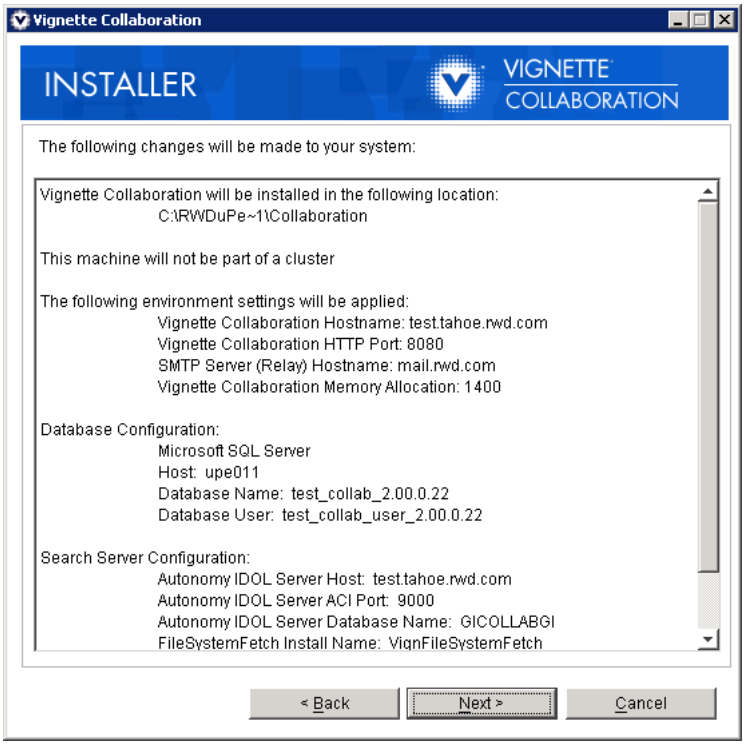
**33.** Click **Next**.




**34.** Review the following fields:

| Field | Description |
|---|---|
| Index Server Fetch Port | This is an optional field.<br>The default is 7000. |
| Index Server Service Port | This is an optional field.<br>The default is 10081. |
| Search Server Database | This is an optional field.<br>The default is GICOLLABGI. |
| Index Server Service Name | This is an optional field.<br>The default is VignFileSystemFetch. |

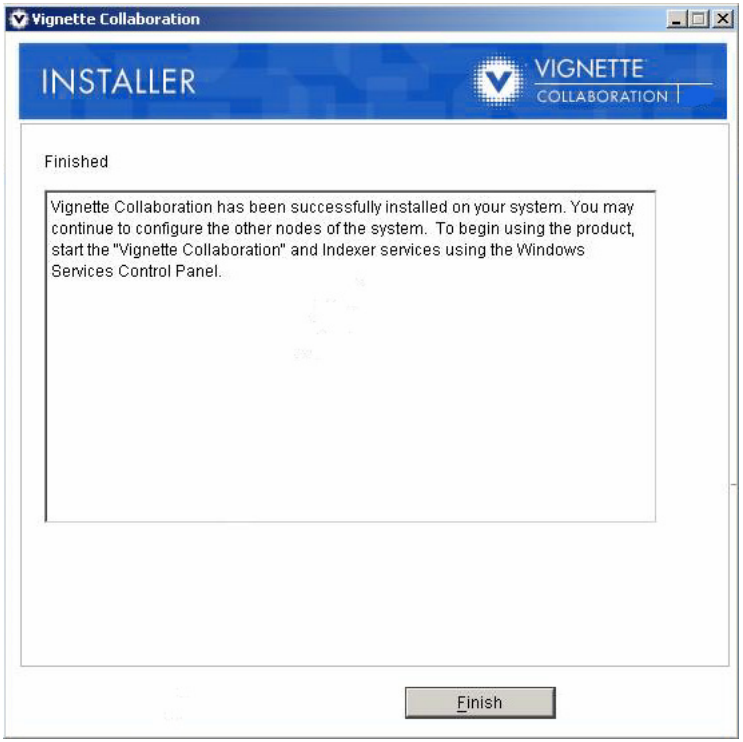
**35.** Click **Next**.




Review and verify that all data displayed is correct.

**36.** Click **Next**.

This process may take several minutes.

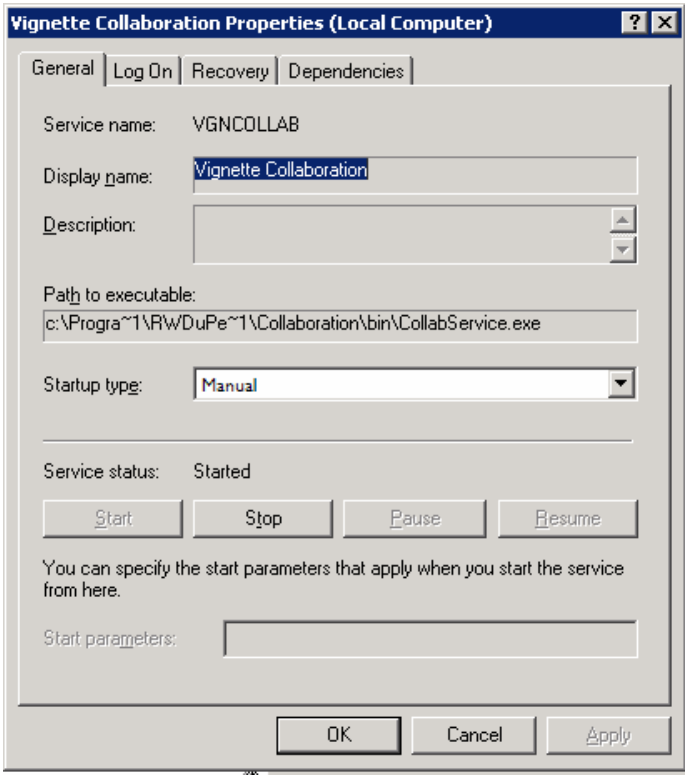



The preceding screen indicates a successful installation.

37. Click **Finish**.

## *Testing the Vignette Installation*

1. Select **START > CONTROL PANEL > ADMINISTRATIVE TOOLS > SERVICES**.
2. Right-click on the **Vignette Collaboration** service, and select **Start**.
3. Double-click on the **Vignette Collaboration** service.




4. Set the **Startup type** to **Manual**.

5. Under **Service Status**, ensure **Start** has been selected.

6. Click **OK**.

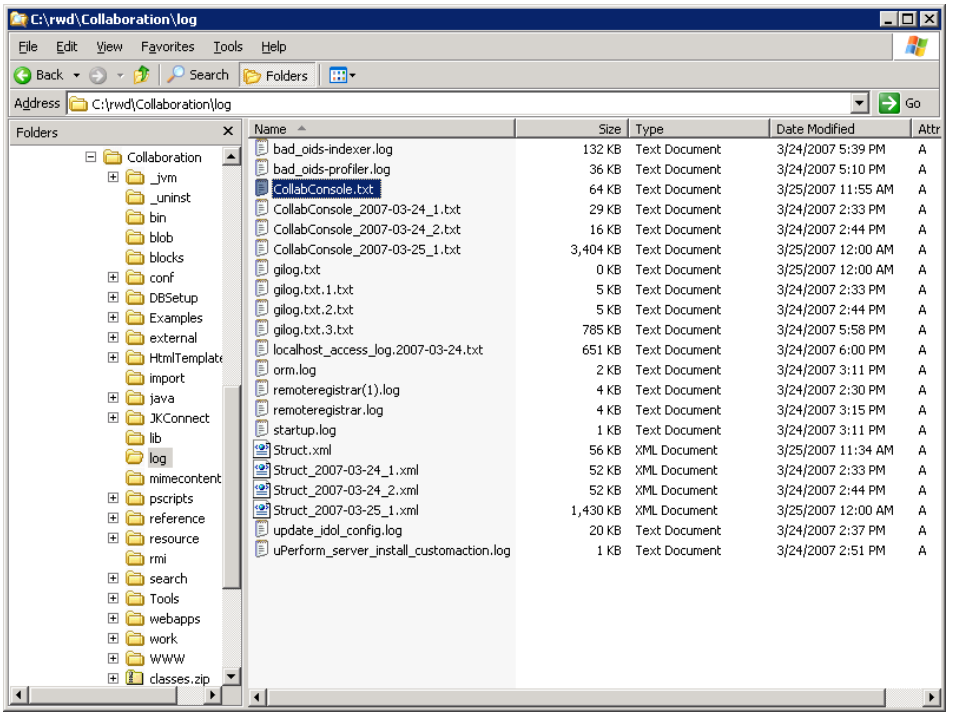
This will automatically start the System Fetch service.

7. Double-click on the **VignetteSystemFetch** service.

8. Set the **Startup type** to **Manual**.

9. Click **OK**.

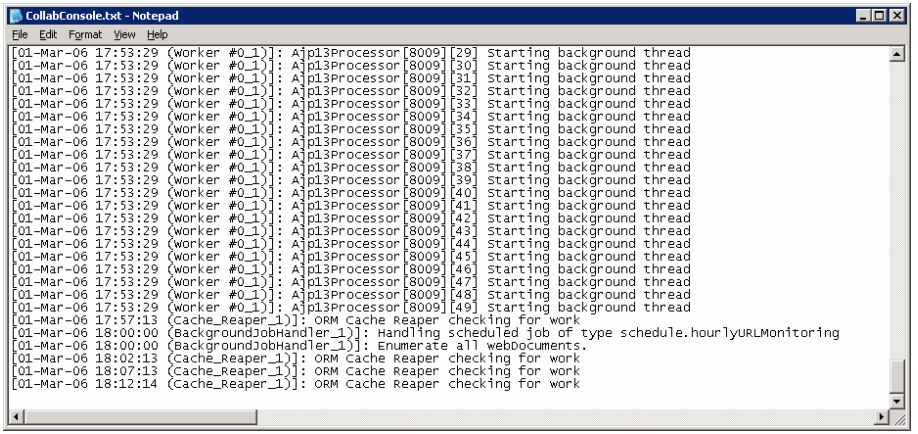
**10.** After successfully starting the service, browse to the Log Directory at **<Installation Location>\Collaboration\log**.



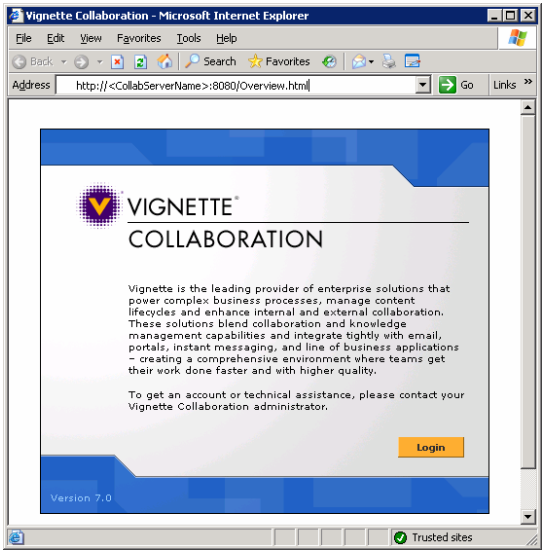

**11.** Ensure the **CollabConsole.txt** file exists in the folder.

As this is the first time the service has been started, the **CollabConsole.txt** file might not yet exist. Wait several minutes for the file to be generated.

**12.** Double-click the **CollabConsole.txt** file and check for errors by reviewing the last line in the text file.




**13.** To confirm the installation, enter **http://<CollabServerName>:8080/** in a web browser.



Do not log into Vignette.

**14.** Close the browser window.

# Configure and Test Search Functionality

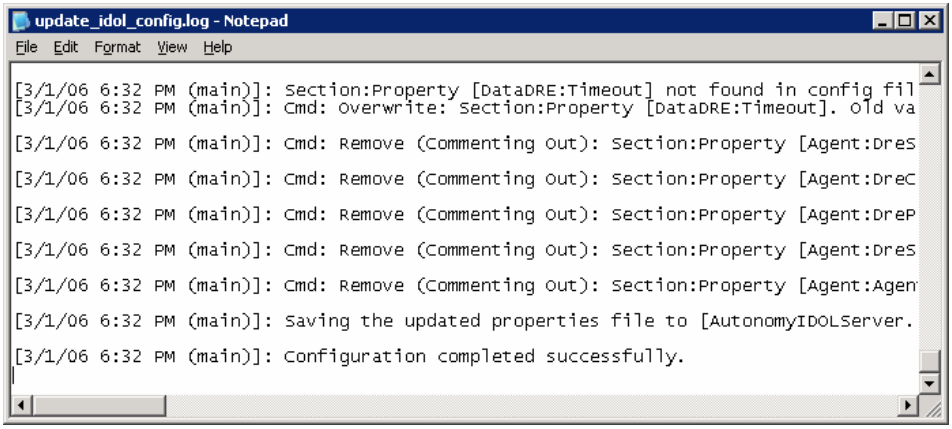
## *Configuring Search Functionality*

1. Select **START > CONTROL PANEL**.
2. Select **Administrative Tools**.
3. Select **Services**.
4. Right-click, and select **Stop** to stop the **Vignette Collaboration** service.
5. Right-click, and select **Stop** to stop the **VignFileSystemFetch** (the Indexer) service.
6. Right-click, and select **Stop** to stop the **AutonomyDISH** service.
7. Right-click, and select **Stop** to stop the **AutonomyIDOLserver** service.
8. Copy the **AutonomyIDOLServer.cfg** file from the search server folder (<uPerform Location>\Autonomy\IDOLserver\IDOL) to the application server folder (<uPerform Location>\Collaboration).
9. Select **START > RUN**.
10. Enter **cmd**.
11. Click **OK**.
12. On the command line, enter **cd [uPerform Location]\collaboration**.
13. Press **Enter**.
14. Run the following command:
    **bin\update_idol_config.bat AutonomyIDOLServer.cfg conf\idol_config_properties.xml**.

This command is case sensitive and generates two files: **log\update_idol_config.log** and **AutonomyIDOLServer.cfg.vbcs**.

15. Close the command window.

16. In Notepad, open the **[uPerform Location]\collaboration\log\update_idol_config.log** file.




17. Check for errors by reviewing the last line in the text file.

18. Copy the generated **AutonomyIDOLServer.cfg.vbcs** file from the application server folder (<uPerform Location>\Collaboration) to the search server folder (<uPerform Location>\Autonomy\IDOLserver\IDOL) .

19. In the Autonomy folder, rename the current file **AutonomyIDOLServer.cfg** to **AutonomyIDOLServer.cfg.default**.

The filename is case sensitive.

20. In the Autonomy folder, rename the generated file to **AutonomyIDOLServer.cfg**.

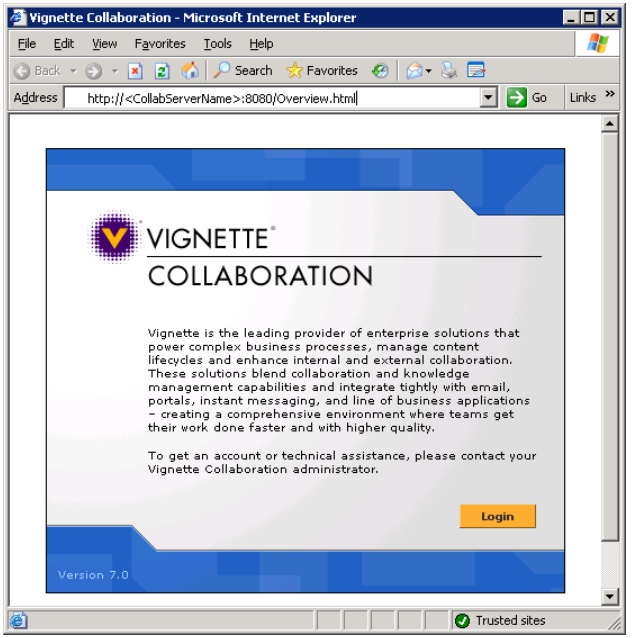
21. Copy **vbcs_email_xml_pass_through.xss** from the application server folder ([uPerform Location]\Collaboration\conf) to the search server folder (<[uPerform Location]\Autonomy\IDOLserver\IDOL\templates) .

### *Testing the Search Functionality Configuration*

1. Select **START > CONTROL PANEL**.
2. Select **Administrative Tools**.
3. Select **Computer Management**.
4. In the left pane, expand **Services and Applications**.
5. Select **Services**.
6. On the search server, start the **AutonomyDISH** service. This will, in turn, start the **AutonomyIDOLServer** service.

   This process may take several minutes.

7. Open **http://<searchservername>:9000/action=GetStatus** and verify that the XML does not contain any errors.
8. On the application server, start the **Vignette Collaboration** service.
9. Enter **http://<CollabServerName>:8080/** in a web browser.




Do not log into Vignette.

10. Close the browser window.

## *Upgrading the Autonomy IDOL Server*

Upgrading the Autonomy IDOL server helps to ensure you are running the most current files in conjunction with Vignette Collaboration.

1. In the patch directory, locate the file **content_[filename]_[version number].exe**.
2. Copy the **content_[filename]_[version number].exe** file.
3. Paste the file in **[search server root]/IDOLserver/IDOL/content**.
4. In IIS, stop the **AutonomyDISH** and **AutonomyIDOLServer** services.
5. Go to **[search server root]/IDOLserver/IDOL/content**.

6. Rename the **content.exe** file to **content_backup.exe**.

7. Rename **content_[filename]_[version number].exe** to **content.exe**.

8. In IIS, start the **AutonomyDISH** service.

The AutonomyIDOLServer will automatically restart.

# Install the RWD uPerform Software

Before installing the RWD uPerform software, install the database server, search server, and application server as described in "Installing the Database Server" on page 22, "Installing the Search Server" on page 58, and "Installing the Application Server" on page 76. To ensure proper installation, perform the procedures in this section in the order specified.

## *Executing the RWD uPerform Software Installation*

You must create a blank database before performing this procedure. Refer to "Creating a Blank Database for Microsoft SQL Server" on page 23 or "Installing Oracle" on page 26 for more information.

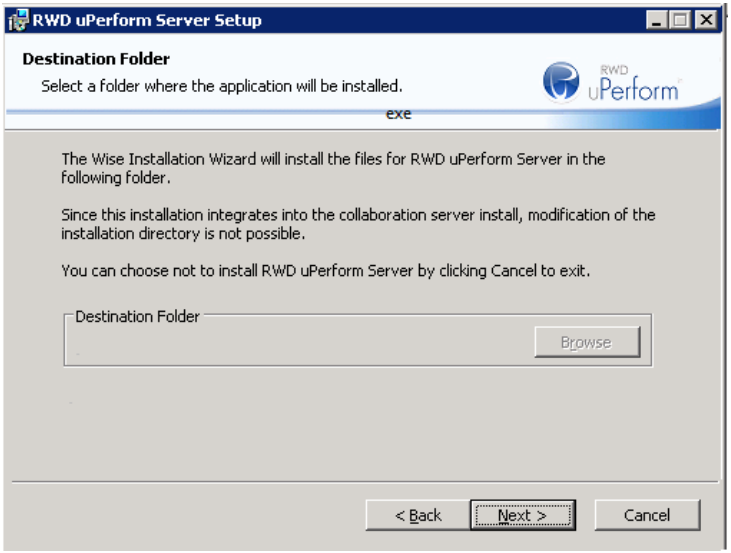
1. Login to the application server.
2. Locate the installation files on your computer.
3. Double-click on **uPerform_Server_Installation.exe** to launch the installation program.

Do not change the name of the .exe file as this will cause errors during installation.

4. Click **Run**.

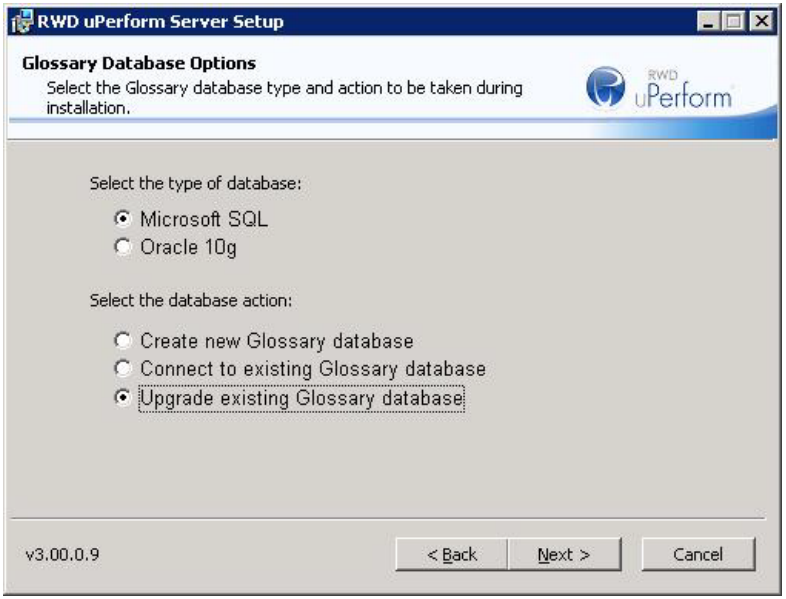
This process may take several minutes.

**5.** Click **Next**.



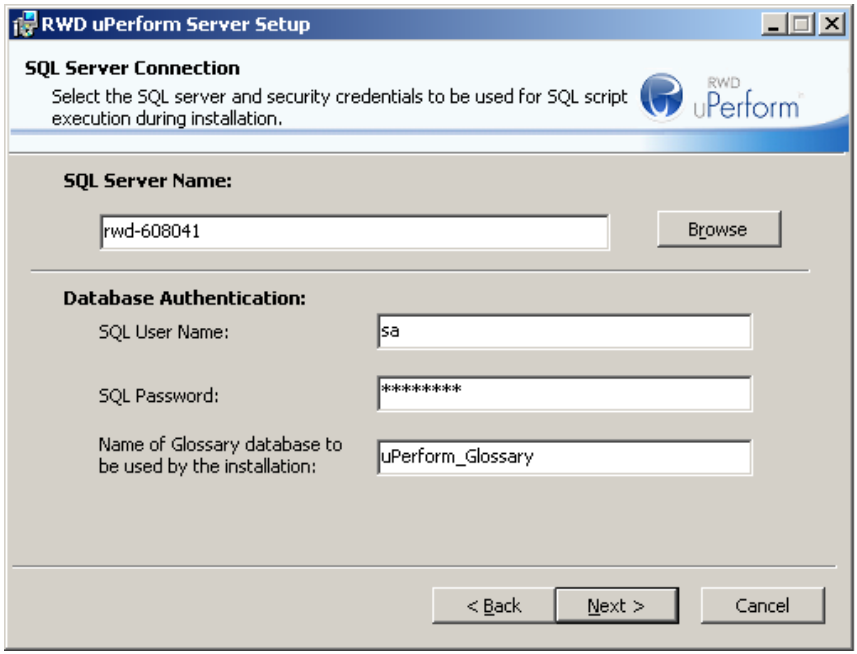

6. Click **Next**.

The RWD uPerform installation searches for the installation of Vignette Collaboration and defaults to the same location. You must install uPerform into the same directory.




**7.** Perform one of the following options:

| If You Want To | Then |
|---|---|
| Install uPerform on the Microsoft SQL Server | Select the **Microsoft SQL** radio button.<br>Select **Create new Glossary database**.<br>Click **Next**.<br>Go to Step 8. |
| Install uPerform on Oracle | Select the **Oracle** radio button.<br>Select **Create new Glossary database**.<br>Click **Next**.<br>Go to Step 11. |

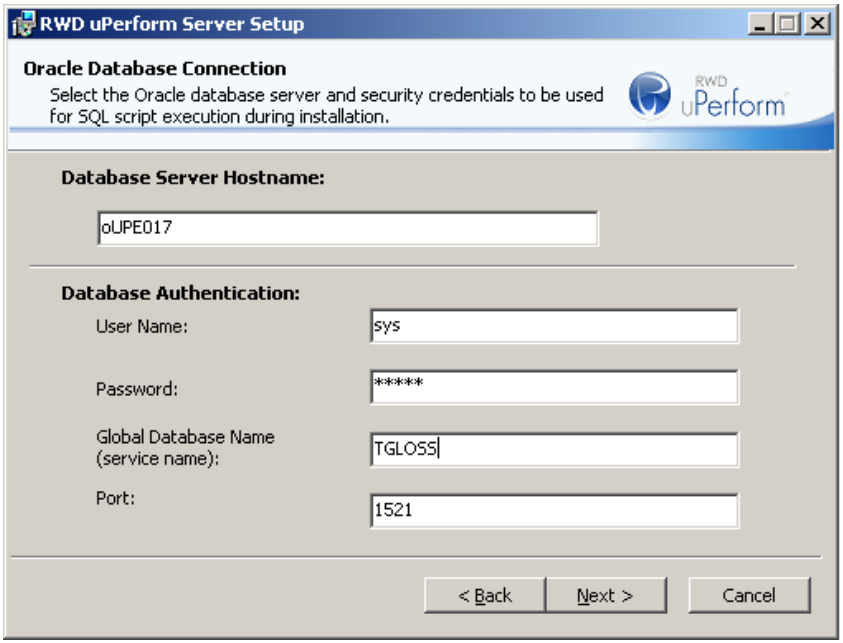



8. Complete the following fields:

| Field | Description |
|---|---|
| SQL Server Name | Enter the SQL Server hostname |
| SQL User Name | Enter the SQL administrator user name. |
| SQL Password | Enter the SQL administrator password. |
| Name of Glossary database to be used by the installation | Enter the name of the Glossary database to be created by the installation process. The password is case sensitive. An alphanumeric combination is recommended. Do not use special characters.<br>This administrator must have rights to create a database. |

9. Click **Next**.

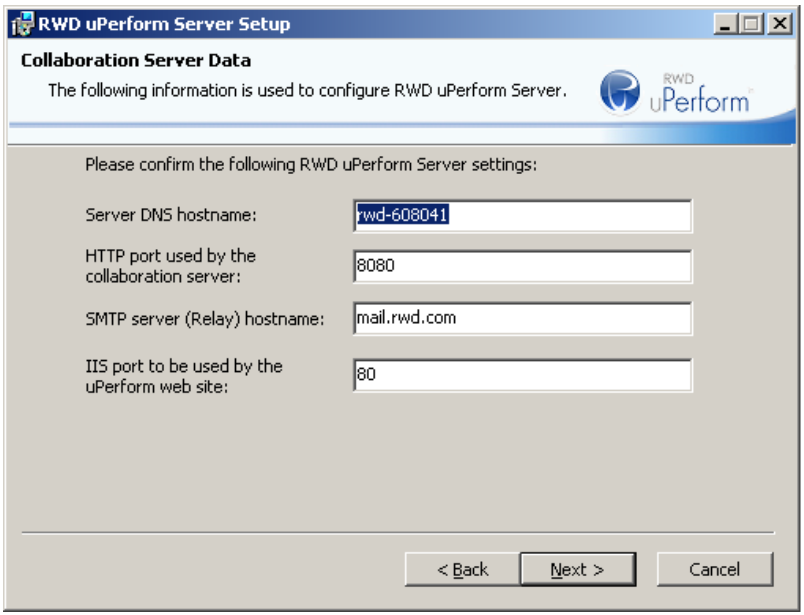
10. Go to Step 13.




**11.** Complete the following fields:

| Field | Description |
|---|---|
| Database Server Hostname | Enter the full hostname. |
| User Name | Enter the Oracle administrator user name. |
| Password | Enter the Oracle administrator password. |
| Global Database Name | Enter the name of the Glossary database you created in "Installing Oracle" on page 26. The password is case sensitive and cannot exceed thirty characters. An alphanumeric combination is recommended. Do not use special characters.<br>This administrator must have rights to create a database. |
| Port | Enter the port number for the Oracle server. |

**12.** Click **Next**.



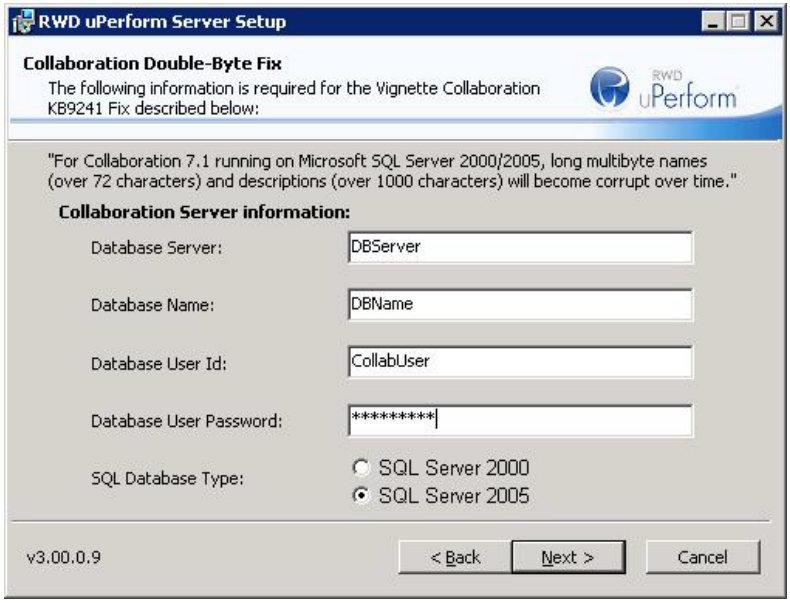

**13.** Complete the following fields:

| Field | Description |
|---|---|
| Server DNS hostname | Review the entry in the **Server DNS hostname** field to ensure that it is correct. |
| HTTP port used by the collaboration server | Review the HTTP port used by the collaboration server to ensure that it is correct. |
| SMTP server (Relay) hostname | Review the SMTP server (Relay) hostname to ensure that it is correct. |
| IIS port to be used by the uPerform web site | Confirm the IIS port to be used by the uPerform website. The default is port 80.<br>Ensure that no other service or process is running on the same IIS port specified for use by the uPerform website. |

**14.** Click **Next**.

**15.** Perform one of the following options

| If You Want To | Then |
|---|---|
| Continue installing uPerform on an SQL server | Go to Step 16. |
| Continue installing uPerform on an Oracle server | Go to Step 18. |

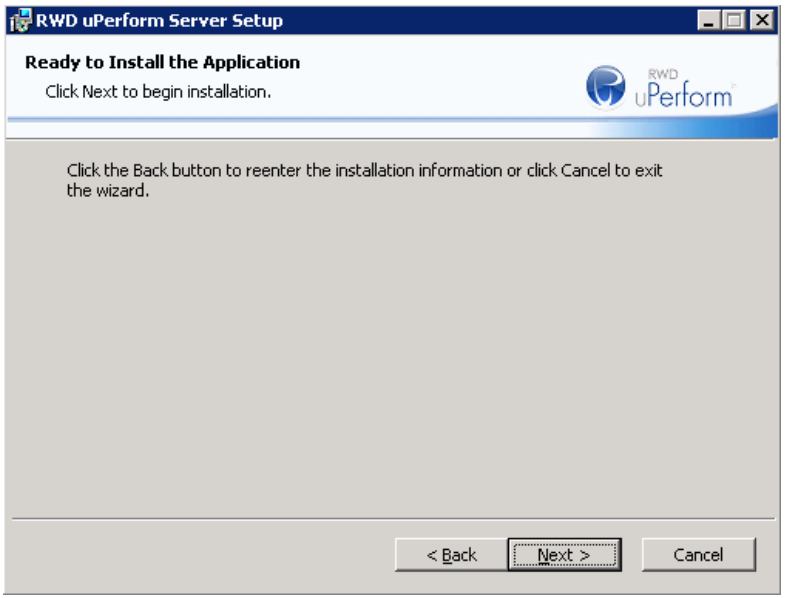



**16.** Complete the following fields:

| Field | Description |
|---|---|
| Database Server | Enter the SQL Server host name. |
| Database Name | Enter the name you assigned to the database. |
| Database User ID | Enter the SQL administrator user name. |
| Database Password | Enter the SQL administrator password. |
| SQL Database Type | Select the SQL Server. |

If you are using SQL Server 2005, the install process runs a check for the READ_COMMITTED_SNAPSHOT command. If the check fails or is set incorrectly, you must run the command after the installation is complete. For more information, "Turning On the READ_ COMMITTED_SNAPSHOT Command" on page 120.

**17.** Click **OK** on the confirmation prompt.




**18.** Click **Next**.

This process may take several minutes.

**19.** When the installation is completed, click **Finish**.

For details on performing required post-installation configuration tasks, refer to "For details on performing required post-installation configuration tasks," on page 113.

# Chapter 4: Configuring the Server

Configuration options for the RWD uPerform® server include processes such as Single Sign-On (SSO), importing users, and scheduling automated tasks.

# Introduction to Configuring the Server

From the server workspace, you can modify several configuration parameters after installation. You can also import user accounts via Lightweight Directory Access Protocol (LDAP). In addition, you can create tasks on the application server to automate glossary, publishing, synchronization, and migration content verification processes.

If you are upgrading to version 3.0, you can do so from versions 2.0 and higher. It is recommended that you back up any version 2.X customizations, the Autonomy IDOL Server, and Vignette. For more information on upgrading, refer to "Upgrading an Existing uPerform Server" on page 155.

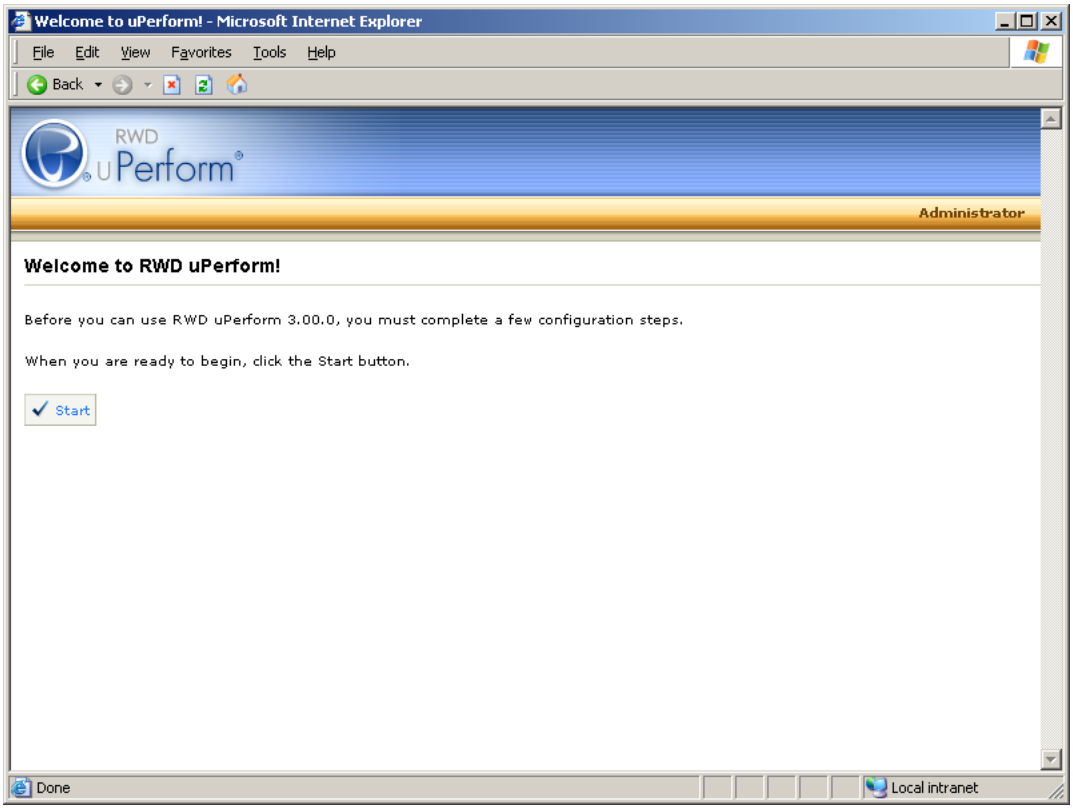
# Configure the uPerform Server

## *Configuring the Server After Installation*

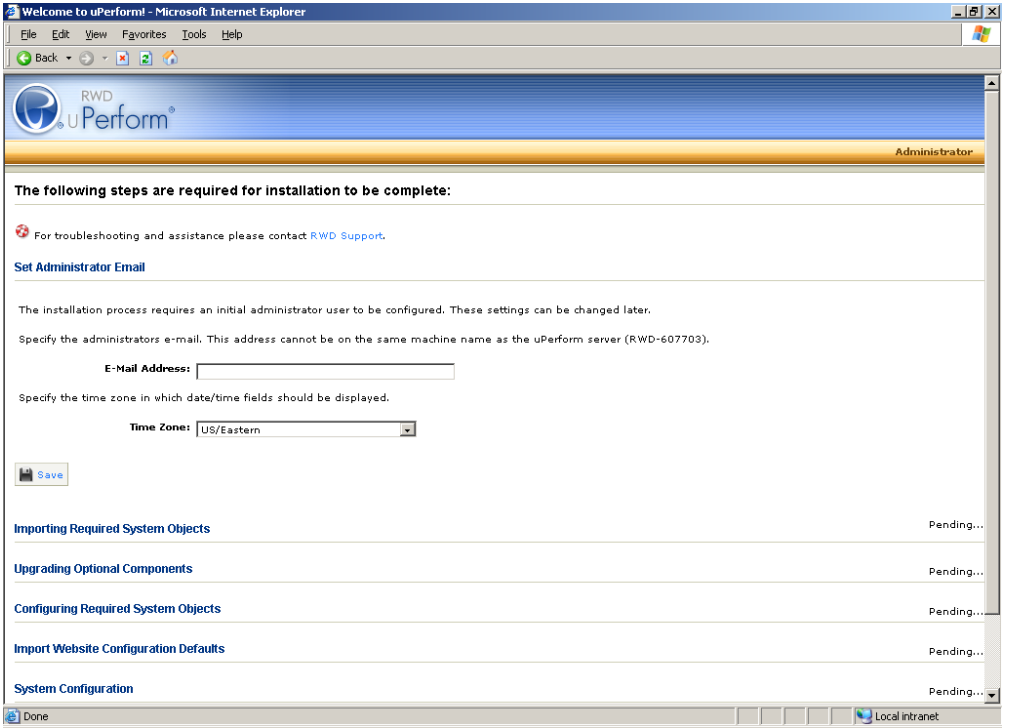
1. Open Internet Explorer.

2. Enter the uPerform server URL in the format **http://<CollaborationServerName>** and login to the server as the **Admin** user to confirm a successful configuration.

   If you are using a port other than the default port 80 for IIS, you must enter the uPerform server URL in the format **http://<CollaborationServerName>:<IIS port number>**.




3. Click **Start**.

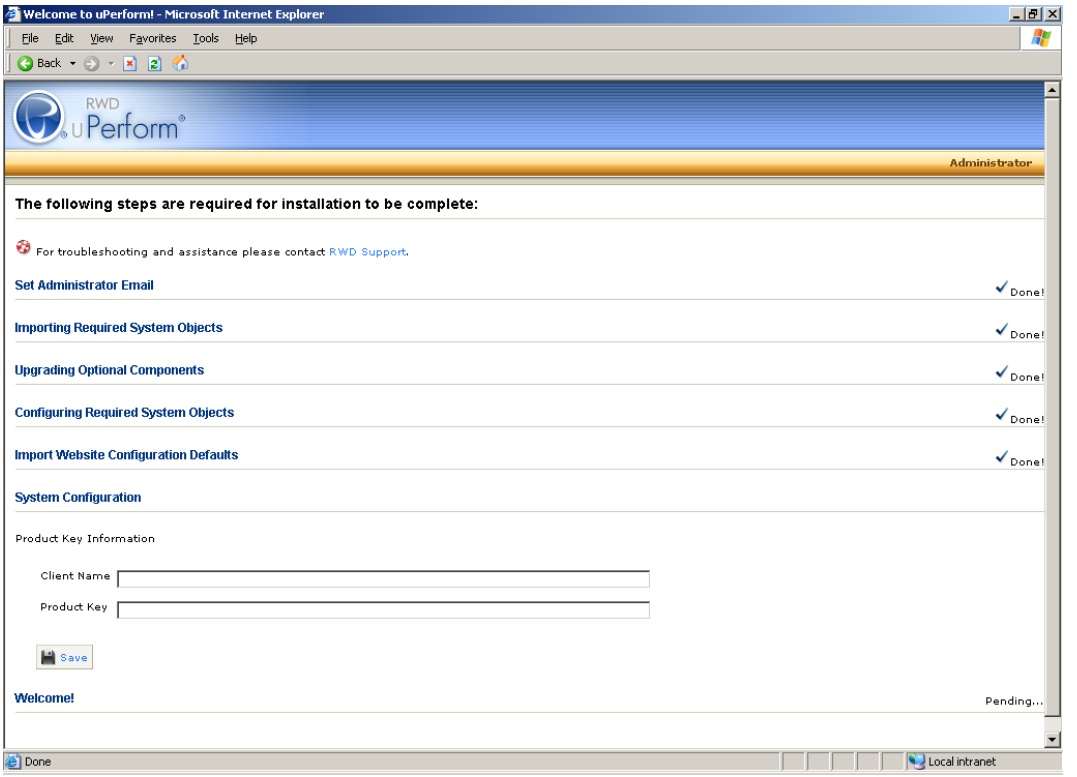



4. Enter an email address for the administrator.

5. Select a time zone from the **Time Zone** drop-down list.

6. Click **Save**.

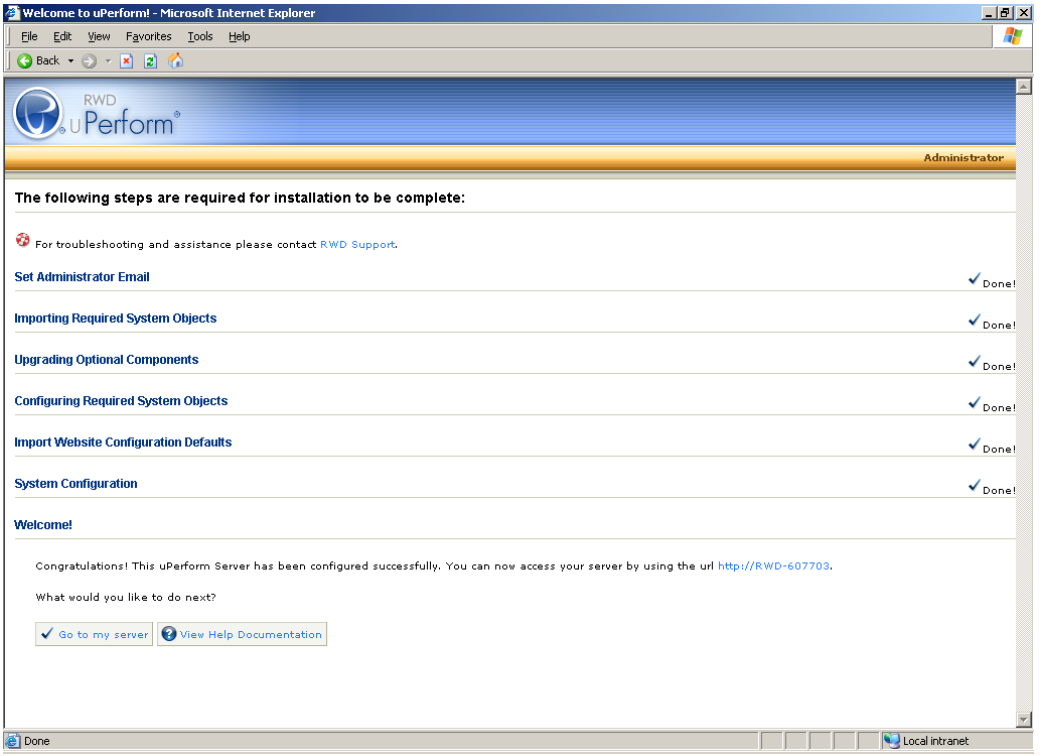
Automated tasks will now run to complete the uPerform installation. Allow these processes to complete before continuing.




**7.** Complete the following fields:

| Field | Description |
|---|---|
| Client Name | Enter the registered client name. |
| Product Key | Enter the product key provided. |

**8.** Click **Save**.




**9.** Click **Go to my server**.

Optionally, click **View Help Documentation** to view the PDF help documents for RWD uPerform.

## *Turning On the READ_ COMMITTED_SNAPSHOT Command*

If you are installing the uPerform Server on an SQL Server 2005 database, uPerform will run a check during installation to ensure the READ_COMMITTED_SNAPSHOT command is turned on. If the command is not turned on, you will receive a prompt during installation. You can continue to run the installation but you must turn on the command once the installation is complete.

If you have a large number of concurrent users, the READ_COMMITTED_SNAPSHOT command helps to provide your users with uninterrupted access to the server from the client or a web browser. This setting reduces locking contention for data during periods of high activity.

This setting is required to ensure the successful execution of background jobs on the application server. For more information about Snapshot, view the detailed Microsoft Technical Article at: http://msdn2.microsoft.com/en-us/library/ms345124.aspx.

1. Stop both the Vignette Collaboration and VignFileSystemFetch services on the application server.

   If you originally installed uPerform using a 1.XX version, you will need to run bin/stoprmid.bat from the collaboration directory.

2. Ensure that no open connections exist with the database.

3. Log into the SQL 2005 database as an administrator.

4. Run the following command: ALTER DATABASE [database name] SET READ_COMMITTED_SNAPSHOT ON

   [database name] is the name of the Collaboration database.

   This setting reduces locking contention for data during periods of high activity. This setting is required to ensure the successful execution of background jobs in Vignette Collaboration. For more information about Snapshot, view the detailed Microsoft Technical Article at: http://msdn2.microsoft.com/en-us/library/ms345124.aspx.

5. Start the Vignette Collaboration service.

   The VignFileSystemFetch service will start automatically.

6. Verify that the service is running by accessing your server through the web interface.

# Configure Properties and Settings from the Server Workspace

From the server workspace, you can configure or change several properties and settings.

## *Configuring Server Properties*

1. Click **Administration** on the left menu.
2. Click **Server Administration** in the *Administration* area.
3. Click **Server Properties** in the *Server Administration* area.
4. As necessary, edit the following options:

| Field | Description |
|---|---|
| Static Properties | Make changes to an individual uPerform server. These changes require a restart.<br>Click **Apply** to make changes, and go to Step 5. |
| Dynamic Properties | Make changes to an individual uPerform server. These changes do not require a restart.<br>Click **Apply** to make changes, and go to Step 5. |
| Search For and Display Properties | Enter a name in the **Property Name** field, and click **Search**. |
| Server Utilities | Displays server utilities. |

5. Click **OK**.

## *Configuring SMTP Settings*

1. Click **Administration** on the left menu.
2. Click **Server Administration** in the *Administration* area.
3. Click **SMTP Settings** in the *Server Administration* area.

4. As required, modify the following fields: **Outbound SMTP Relay Server**, **Outbound SMTP Send Interval**, and **Incoming SMTP Connection Port**.

5. Click **OK**.

### *Configuring Global Settings*

1. Click **Administration** on the left menu.

2. Click **Server Administration** in the *Administration* area.

3. Click **Global Settings** in the *Server Administration* area.

4. As required, edit the **Client Name** or **Product Key**.

5. Enter the **Results Per Page** for the search pagination.

6. Click **Update**.

### *Recreating the Search Database*

Only perform this action following a new installation or upgrade of RWD uPerform.

1. Click **Administration** on the left menu.

2. Click **Server Administration** in the *Administration* area.

3. Click **Global Settings** in the *Server Administration* area.

4. Click **Recreate Search Database**.

This process may take several minutes.

## Configuring Locale Settings

If you are planning to support multiple languages, you must configure these settings.

1. Click **Administration** on the left menu.
2. Click **Server Administration** in the *Administration* area.
3. Click **Locale Settings** in the *Server Administration* area.
4. Choose from the following options:

| If You Want To | Then |
|---|---|
| Enable locales | Select a locale from the **Available Locales** list.<br>Click the left arrow. |
| Disable locales | Select a locale from the **Enable Locales** list.<br>Click the right arrow. |

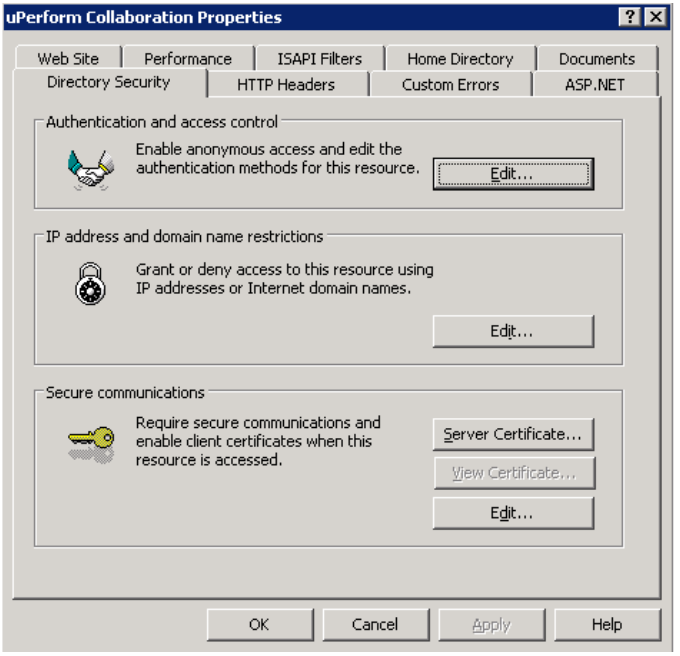
5. Select a default locale from the drop-down list in the *Collaboration System Default Locale* area.
6. Click **OK**.

# Implement SSO Using NTLM Authentication

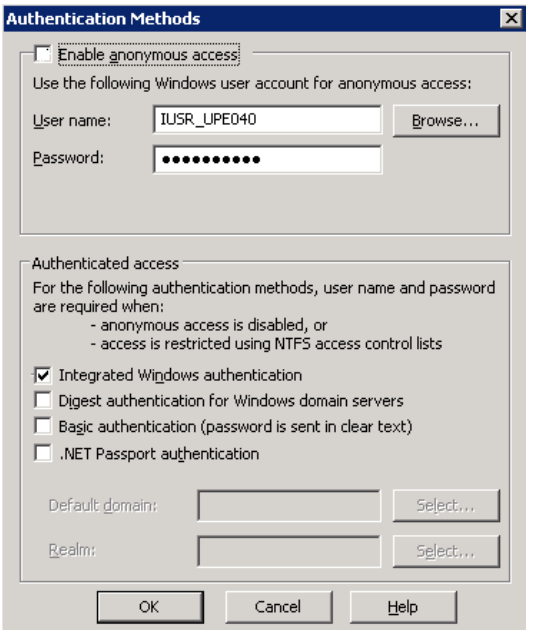
Before implementing Single Sign-On (SSO) using the Microsoft NT LAN Manager (NTLM) authentication, there must be at least one user, with system administrator privileges, that matches an account on the domain. This user must have the same username as the one on the uPerform server.

## *Implementing SSO Using NTLM*

1. Open IIS using the path **WINDOWS > SETTINGS > CONTROL PANEL > ADMINISTRATIVE TOOLS > INTERNET INFORMATION SERVICES**.
2. Expand the **Web Sites** folder.
3. Right-click on the **uPerform Collaboration** website, and select **Properties**.
4. Select the **Directory Security** tab.




5. In the *Authentication and access control* area, click **Edit**.

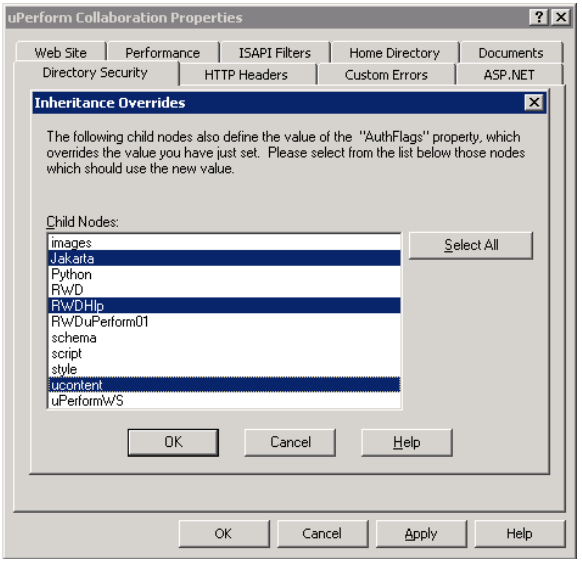



6. Deselect the **Enable anonymous access** checkbox.

7. Select the **Integrated Windows authentication** checkbox.

8. Click **OK**.

**9.** Click **Apply**.




**10.** On the *Inheritance Overrides* window, select **Jakarta**, **RWDHlp**, and **ucontent**.

**11.** Click **OK**.

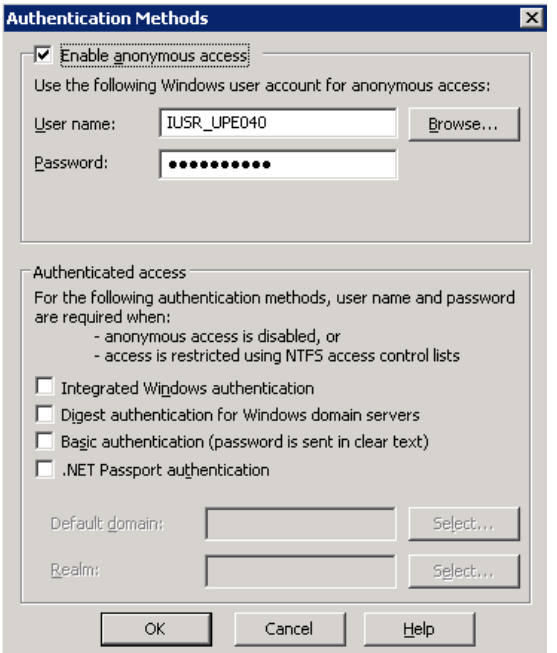
**12.** Click **OK.**

**13.** In IIS, click on the **uPerform Collaboration** website folder.

**14.** Right-click on **ntlmerror.html**, and select **Properties**.

**15.** Select the **File Security** tab.

**16.** In the *Authentication and access control* area, click **Edit**.




**17.** Select **Enable anonymous access**.

**18.** Ensure no options are selected under **Authenticated access**.

**19.** Click **OK**.

**20.** Click **OK**.

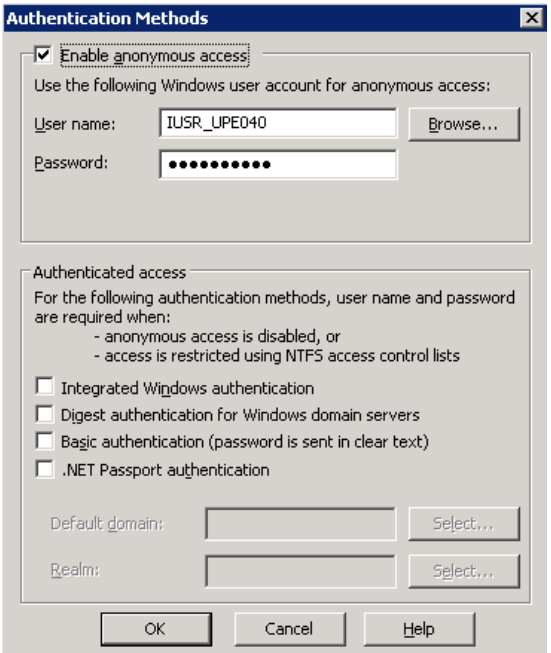
**21.** In IIS, click on the **uPerform Collaboration** website folder.

**22.** Right-click on **uContent**.

**23.** Select **Properties**.

**24.** Select the **Directory Securities** tab.

**25.** In the *Authentication and access control* area, select **Edit**.




**26.** Select **Enable anonymous access**.

**27.** Ensure no options are selected under **Authenticated Access**.

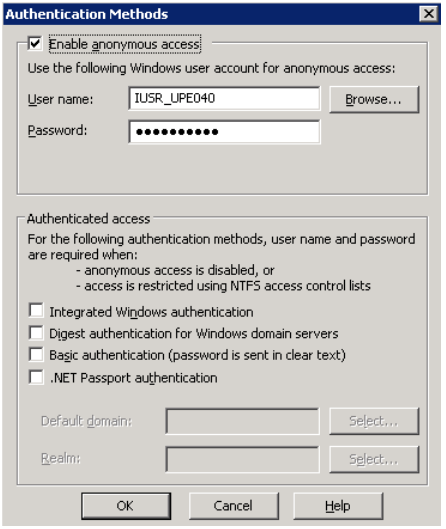
**28.** Click **OK**.

**29.** Click **OK**.

**30.** In the **uPerform Collaboration** folder, right-click on **Python**, and select **Properties**.

**31.** Click the **Directory Security** Tab.

**32.** In the *Authentication and access control* area, click **Edit**.




**33.** Select **Enable anonymous access.**

**34.** Ensure no options are selected under **Authenticated Access**.

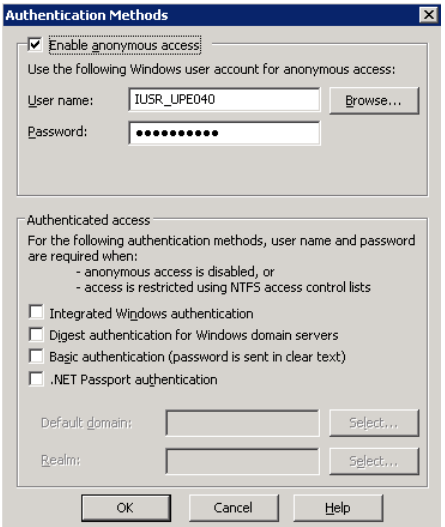
**35.** Click **OK**.

**36.** Click **OK**.

**37.** In the **uPerform Collaboration** folder, right-click on **uPerformWS**, and select **Properties.**

**38.** Select the **Directory Security** tab.

**39.** In the *Authentication and access control* area, click **Edit**.



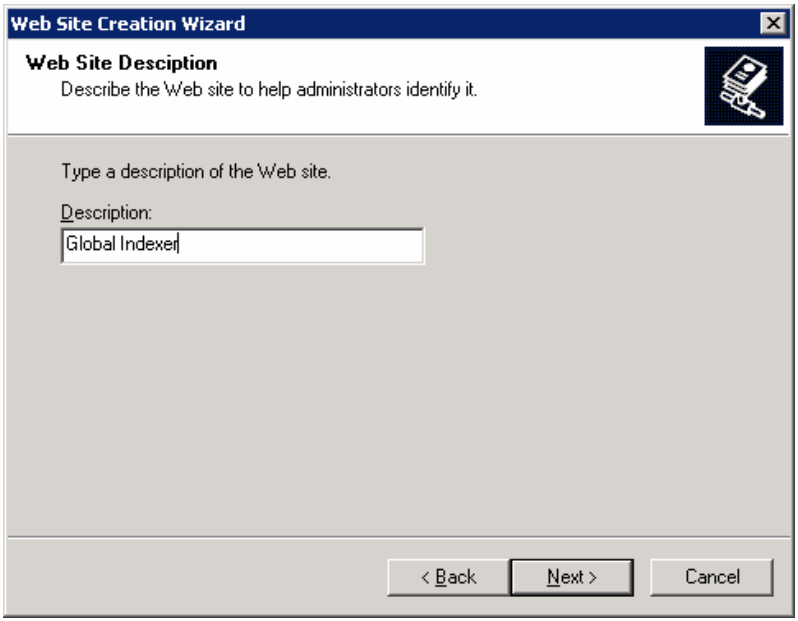

**40.** Select **Enable anonymous access.**

**41.** Ensure no options are selected under **Authenticated Access**.

**42.** Click **OK**.

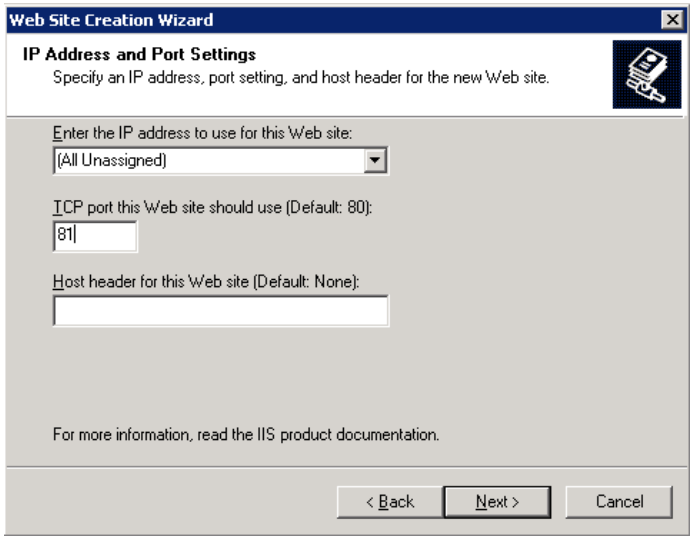
**43.** Click **OK**.

**44.** In IIS, create a new website by right-clicking on the **Web Sites** folder**,** and selecting **WEB SITES > NEW > WEB SITE…** .




**45.** Enter **Global Indexer** in the **Description** field.

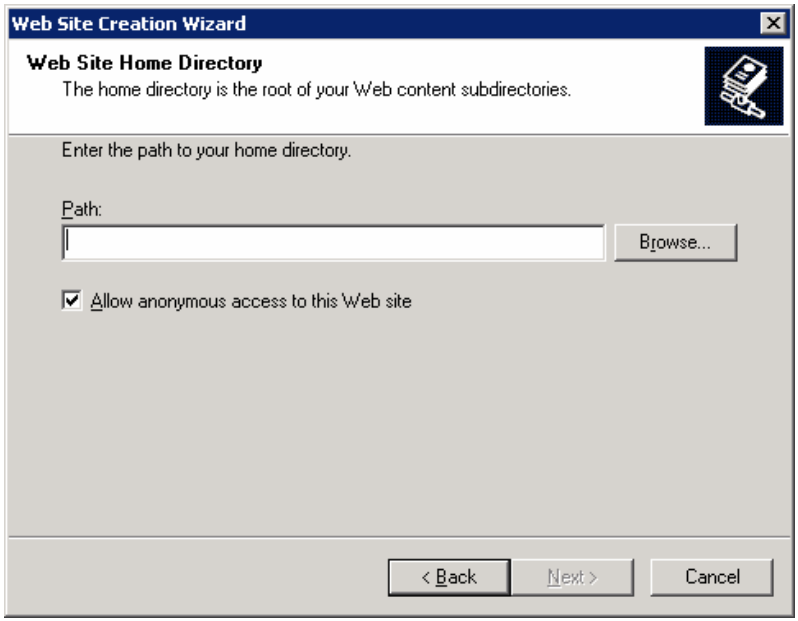
**46.** Click **Next**.



47. Ensure **(All Unassigned)** is displayed in the **Enter the IP address to use for this Web site** field.

If port 80 is already used by another website, enter an available port number in the **TCP port** field.

48. Click **Next**.




49. In the **Path** field, enter the path to the **%COLLAB_ROOT%\WWW** directory.

50. Select the **Allow anonymous access to this Web site** checkbox.

51. Click **Next**.

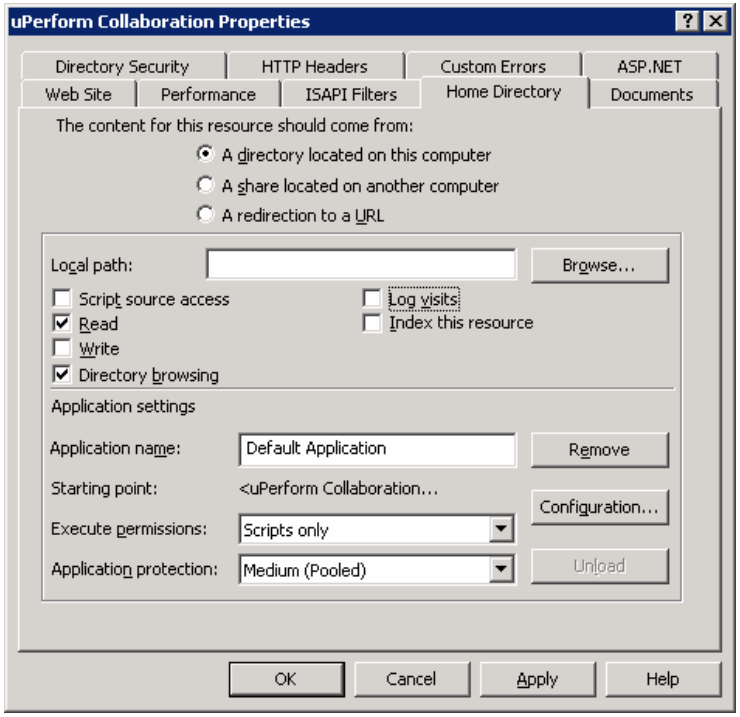
52. Enable the **Read** and **Browse** areas.

53. Click **Next**.

54. Click **Finish**.

55. Right-click on the new **Global Indexer** website, and select **Properties**.

**56.** Select the **Home Directory** tab.

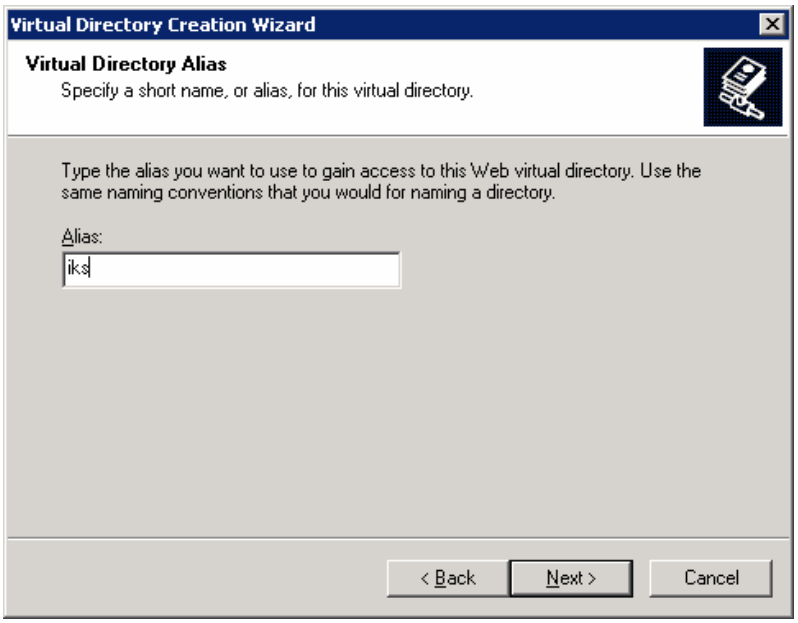



**57.** Ensure the **Read** and **Directory browsing** checkboxes are selected.

**58.** Click **OK**.

**59.** In IIS, right-click on the new **Global Indexer** website and select **NEW > VIRTUAL DIRECTORY...** .

**60.** Click **Next**.




61. Enter **iks** in the **Alias** field.

62. Click **Next**.

63. In the **Path** field, enter the path to the **<Installation Directory>\Collaboration\bin** directory.

64. Click **Next**.

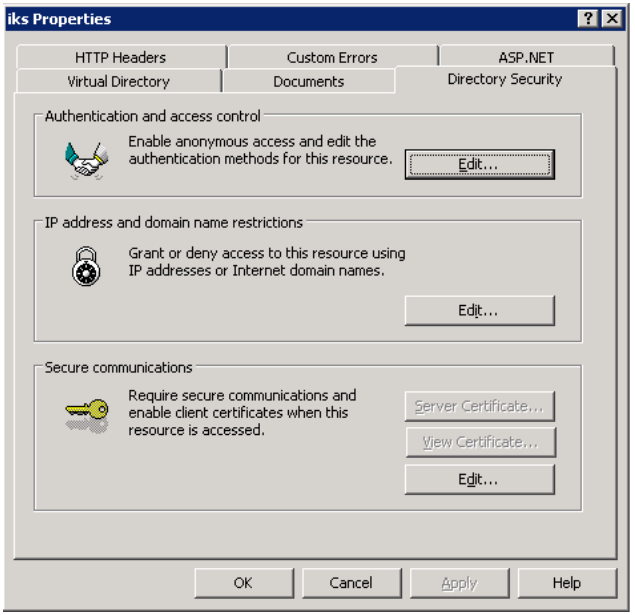
65. Enable the **Read** and **Browse** areas.

66. Click **Next**.

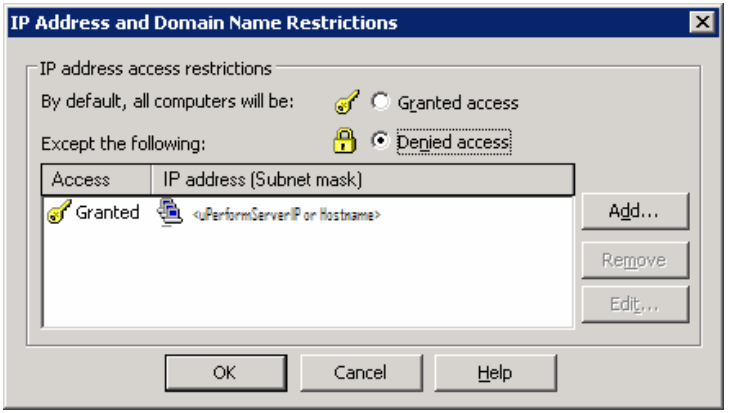
67. Click **Finish**.

68. In the **Web Sites** folder, right-click on the new **iks** website, and select **Properties**.

69. Select the **Directory Security** tab.




**70.** In the *IP address and domain name restrictions* section, click **Edit...** .



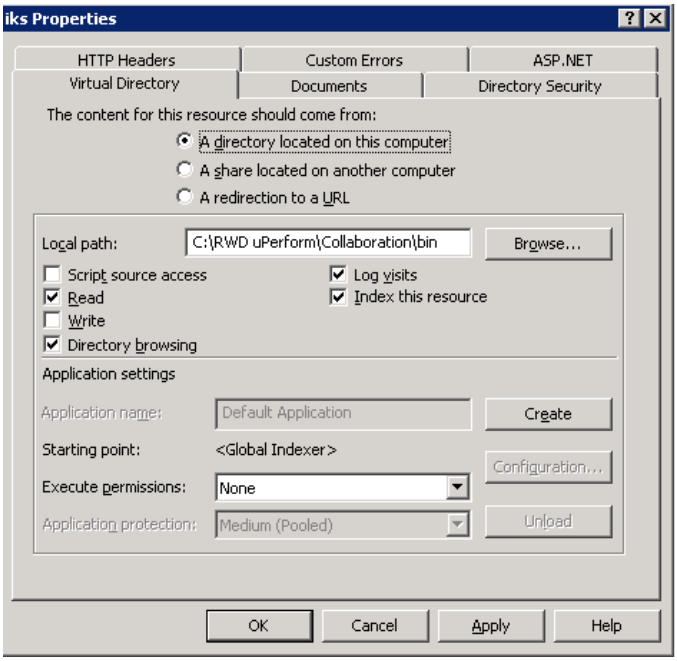

**71.** Select the **Denied access** radio button.

**72.** Click **Add...** and enter the IP address and DNS name of the collaboration server.

Ensure that only the collaboration server is displayed in the listbox and that the access for this server is set to **Granted**.

**73.** Click **OK**.

**74.** On the *Properties* window, select the **Virtual Directory** tab.




**75.** Ensure the **Read** and **Directory browsing** checkboxes are selected.

**76.** Click **OK**.

**77.** Select **WINDOWS > SETTINGS > CONTROL PANEL > ADMINISTRATIVE TOOLS > SERVICES**.

**78.** Stop the **Vignette Collaboration** service.

**79.** Stop the **VignFileSystemFetch** service.

**80.** In Windows Explorer, browse to the **<Installation Directory>\Collaboration\Conf** directory.

**81.** To retain a copy of the **jaas.conf** file, rename the file to **jaas.conf.bak**.

82. Copy the **jaas.conf.ntlm** file, and rename the file to **jaas.conf.ntlm.bak**.

83. Rename the **jaas.conf.ntlm** file to **jaas.conf**.

84. To retain a copy of the **server.xml** file, rename the file to **server.xml.bak**.

85. Copy the **server.xml.ntlm** file, and rename the file to **server.xml.ntlm.bak**.

86. Rename the **server.xml.ntlm** file to **server.xml**.

87. In Windows Explorer, browse to the **<Installation Directory>\Collaboration** directory.

88. To retain a copy of the **classes.zip** file, rename the file to **classes.zip.bak**.

89. Copy the **classes.zip.ntlm** file, and rename the file to **classes.zip.ntlm.bak**.

90. Rename the **classes.zip.ntlm** file to **classes.zip**.

91. In Windows Explorer, browse to the **<Installation Directory>\Collaboration\WWW\uPerformWS** directory.

92. To retain a copy of the file **RWD.uPerform.ServerConfiguration.DLL.config**, make a copy of the file and rename the file **RWD.uPerform.ServerConfiguration.DLL.config.bak**.

93. Open the **RWD.uPerform.Configuration.DLL.config** file in Notepad.

94. Change **<add key="AuthenticationType" value="Basic"/>** to **<add key="AuthenticationType" value="NTLM"/>**.

95. Save the **RWD.uPerform.Configuration.DLL.config** file, and close the file.

96. In Windows Explorer, browse to the **<Installation Directory>\Collaboration\WWW\script** directory.

97. To retain a copy of the file **common.js**, make a copy of the file and rename the file to **common.js.bak**.

98. Open the **common.js** file in Notepad.

**99.** Change **var isSSO = false;** to **var isSSO = true;**.

**100.** Change **var hostURL = "[servername.com]"** to the machine name, not the DNS entry.

**101.** Save the **common.js** file, and close the file.

**102.** In Services, start the **Vignette Collaboration** service. This will, in turn, start the **Vign-FileSystemFetch** service.

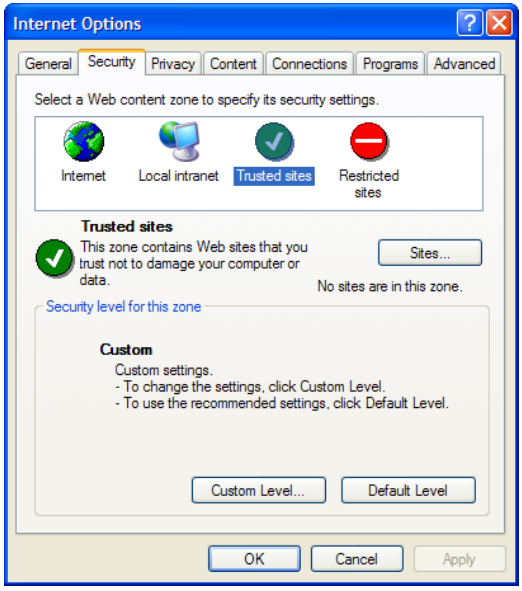
**103.** Open IIS using the path **WINDOWS > SETTINGS > CONTROL PANEL > ADMINISTRATIVE TOOLS > INTERNET INFORMATION SERVICES**, and restart IIS.

Do not click **End Now**. Allow the process to run until complete.

## *Configuring SSO on the End User Computer*

The following steps must be performed on end users' computers to enable SSO on these computers.

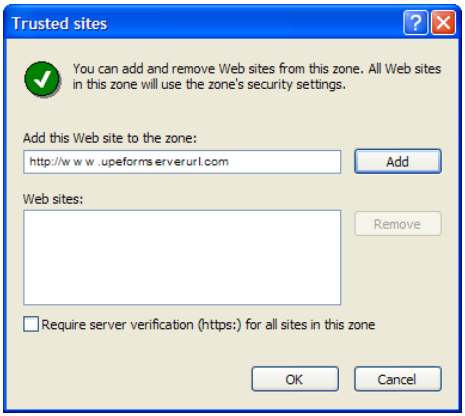
**1.** In Internet Explorer, select **TOOLS > INTERNET OPTIONS...**.



2. Select the **Security** tab.

3. Select **Trusted Sites**.

4. Click **Sites...** .

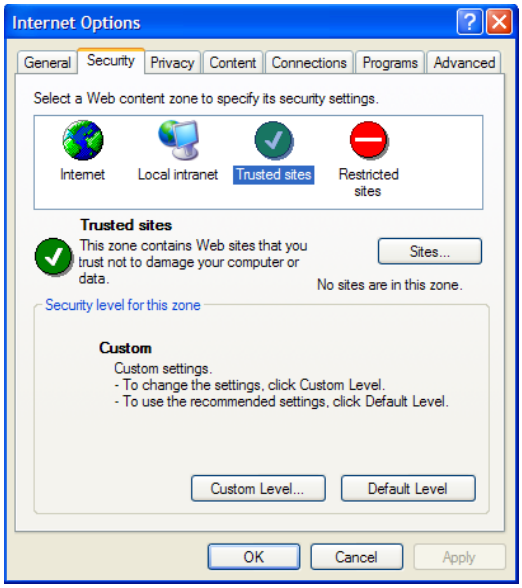



5. Deselect the **Require server verification (https:) for all sites in this zone**.

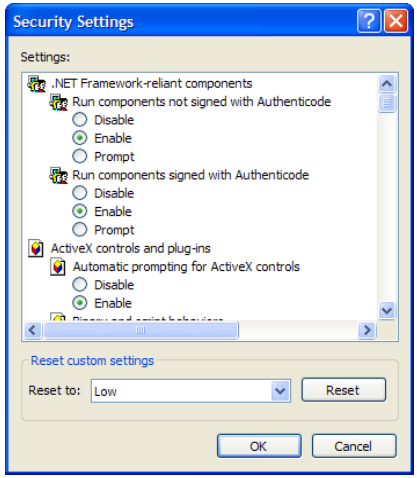
6. Enter the uPerform server URL in the **Add this Web site to the zone** field.

7. Click **Add**.

8. Click **Close**.



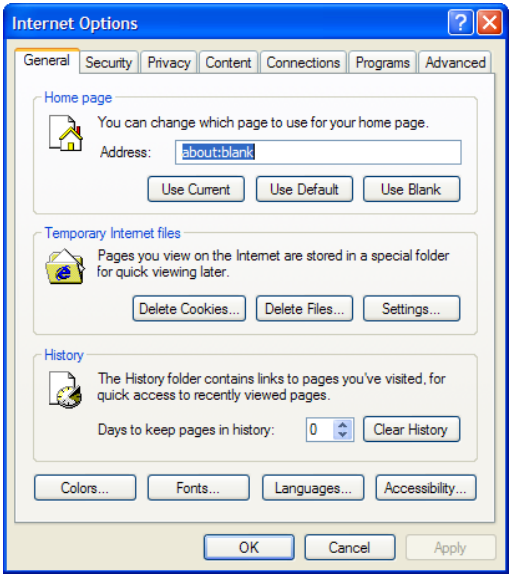

9. In the *Security level for this zone* area, click **Custom Level...**.




10. Within the *Miscellaneous* section, enable **Access data sources across domains**.

11. Within the *User Authentication* section, enable **Automatic logon with current username and password.**

12. Click **OK**.




13. Click the **General** tab.

14. In the *Temporary Internet files* area, click **Delete Files...**.

15. At the prompt, click **Yes** to confirm.

16. In the *History* area, click **Clear History**.

17. Click **Close**.

18. Click **OK**.

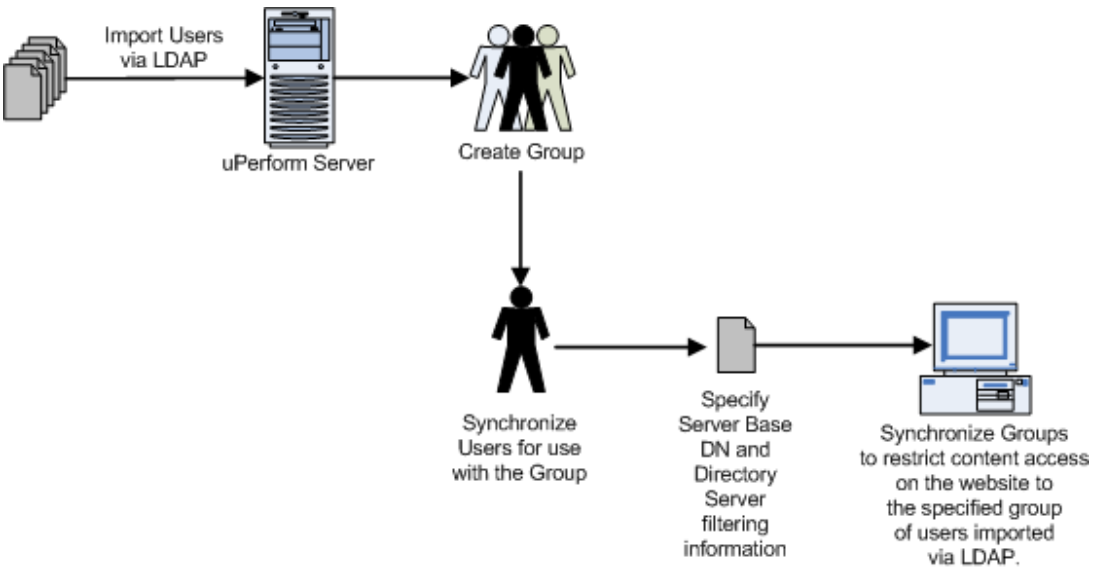
19. Close all open sessions of Internet Explorer.

20. Launch a new instance of Internet Explorer, and log into the uPerform server.

## Import Users via LDAP

From the server workspace, you can import users from your Directory Server via Lightweight Directory Access Protocol (LDAP) in order to automatically create uPerform user accounts. RWD recommends that you conduct an import via LDAP only once to initially create user accounts. Future users can be added to the Directory Server and brought into uPerform using the synchronize functionalities found in *LDAP Settings*. For more information, refer to "Importing Users via LDAP" on page 144.

If you are planning to work with groups, the following diagram represents a high-level overview of the process of initially adding users imported via LDAP to groups.




For more information on working with groups, refer to the companion manual *Managing Content with RWD uPerform*.

## *Importing Users via LDAP*

This procedure assumes you are operating within a Microsoft Windows network.

1. Click **Administration** on the left menu.
2. Click **Server Administration** in the *Administration* area.
3. Click **LDAP Settings** in the *Server Administration* area.
4. Complete the following fields:

| Field | Description |
|---|---|
| Location of LDAP Directory | Enter the name of the Directory Server.<br>Example: the computer name of the domain controller |
| Base Name for users search imported from LDAP directory | Enter the Organization Unit (OU) where the uPerform server will begin to search for users to import.<br>Example: **OU=COLLABORATION USERS, OU=uPerform,OU=DEV4000,DC=dev4000,DC=RWDTECH,DC=com** |
| Filter string for users search from LDAP directory | The Directory Server contains many kinds of data.<br>To instruct the LDAP Query (Search) to only return users, specify one of the following search query types:<br>**(&(objectClass=user)(samaccounttype=805306368)(objectCategory=person)(cn=*))**<br>OR<br>**(objectClass=user)** |
| LDAP group membership attribute ID, that identifies group members of LDAP user group | Enter **LDAP_Imported_Users**. |

| Field | Description |
|---|---|
| Security Connection | Select the **Simple** radio button.<br>User DN: Specify a user that has administrative rights on the Directory Server and specify the domain. In the following example, the user is Admin.<br>Example: **Admin@Client.MyCompany.com**<br>Password: Enter the password of the User DN account. |
| Mapping of uPerform Fields | Specify the properties from the Directory Server that you want to map to the user account in uPerform:<br>**User ID: samaccountname**<br>**Email Address: mail**<br>**First Name: fname** |

5. To clear fields not mapped to LDAP fields, select the **Upon synchronization, clear Collaboration fields that are not mapped to LDAP fields**.

6. Perform one of the following options:

| If You Want To | Then |
|---|---|
| Save your settings | Click **OK**. |
| Save your settings and import the user accounts | Click **Synchronize Users**. |
| Save your settings and import user accounts and group information | Click **Synchronize Users and Groups**. |

# Schedule Automated Tasks

The uPerform server can be configured to automatically:

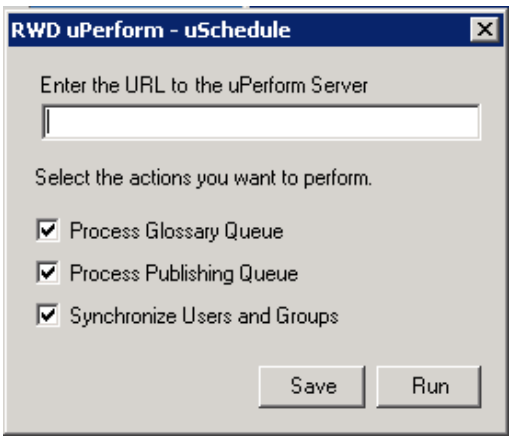
- ❒ Globalize the documents in the globalize queue daily during off-peak hours.
- ❒ Automatically publish the documents in the publish queue daily at off-peak hours.
- ❒ Automatically synchronize your users and groups.

The RWD.uSchedule.exe application and the Microsoft Windows task can be configured and run from any computer with access to the uPerform application server. In addition, you can have multiple RWD.uSchedule.exe applications and tasks to allow you to execute multiple configuration options (for example, execute a Glossary task at midnight and execute a Publishing task at 7:00am).

## *Scheduling Tasks*

1. In Windows Explorer, browse to the RWD.uSchedule.exe file and double-click on the file to launch the executable.

The RWD.uSchedule.exe file is located on the application server at C:\Program Files\RWDuPerform\Collaboration\WWW\uPerformWS\bin. You can copy this file to your local computer for configuration and execution.



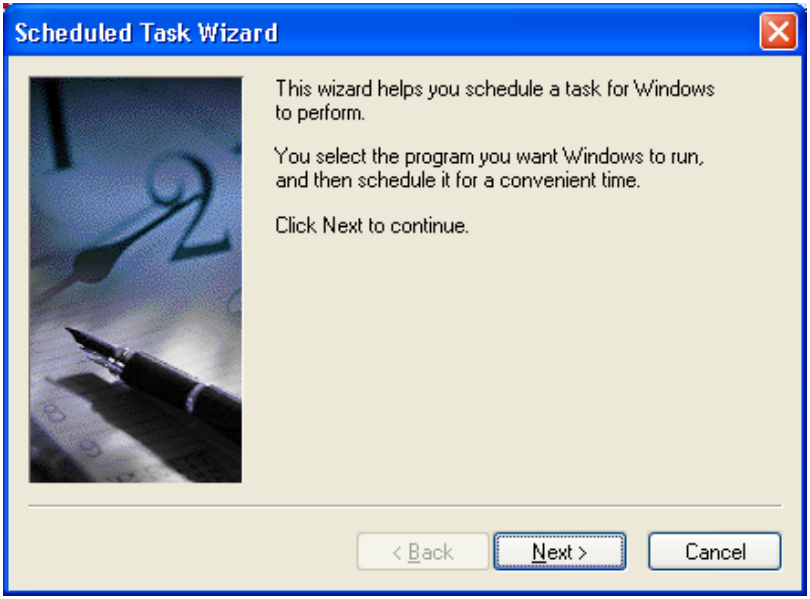
2. Complete the following fields:

| Field | Description |
|---|---|
| Enter the URL to the uPerform Server | Enter the URL to the uPerform application server.<br>Example: **http://myserver.uperform.com/** |
| Process Glossary Queue | Select the **Process Glossary Queue** checkbox to execute a globalize task. |
| Process Publishing Queue | Select the **Process Publishing Queue** checkbox to execute a publish task. |
| Synchronize Users and Groups | Select the **Synchronize Users and Groups** checkbox to execute a synchronize task. |

3. Click **Save** to save your configuration settings for use in a Microsoft Windows task.

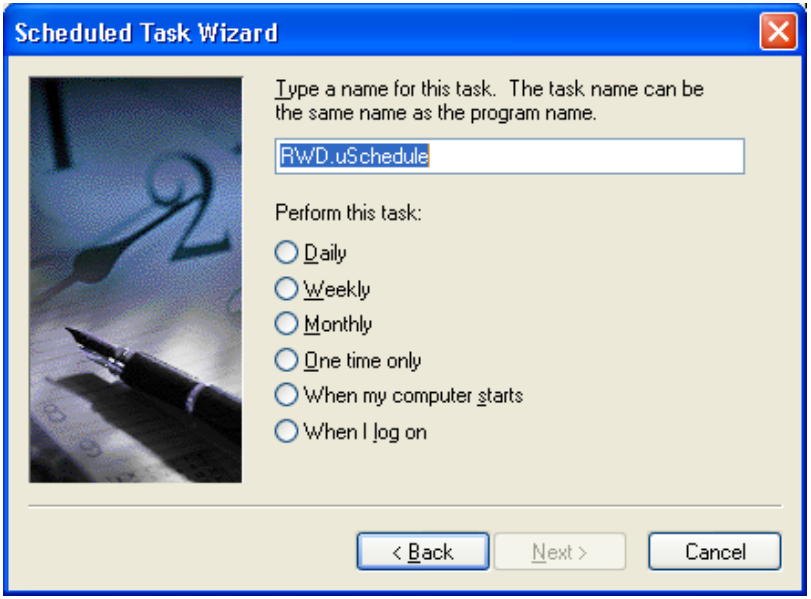
To execute your settings immediately, click **Run**.

4. Select **START > CONTROL PANEL > SCHEDULED TASK > ADD SCHEDULED TASK**.




5. Click **Next**.

6. Click **Browse...** to browse to the location of the **RWD.uSchedule.exe** file, select the executable, and click **Open**.



7. Complete the following fields:

| Field | Description |
|---|---|
| Type a name for this task | Enter a descriptive name to identify the task.<br>Example: **RWD.uSchedule** |
| Perform this task | Select the radio button corresponding to the desired task frequency. |

8. Click **Next**.

The following screen will vary based on the task frequency you selected in the previous screen.

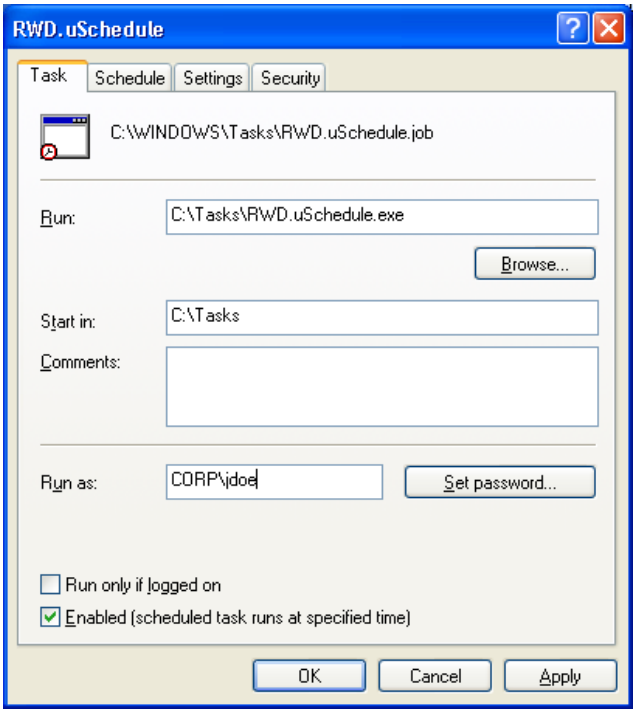
9. Select the time and date options relevant to the task frequency, and click **Next**.

**10.** Complete the following fields:

| Field | Description |
|---|---|
| Enter the password | The password for the user account indicated in the **Enter the user name** field. |
| Confirm password | The password for the user account indicated in the **Enter the user name** field. |

**11.** Click **Next**.

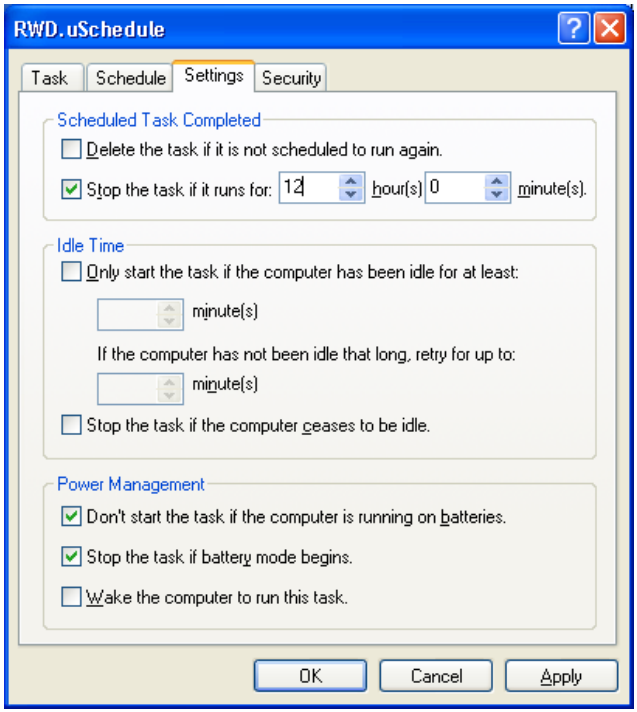
**12.** Click the **Open advanced properties for this task when I click Finish** checkbox, and click **Finish**.




**13.** Complete the following field:

| Field | Description |
|---|---|
| Run | Append -r to the end of the path to the RWD.uSchedule executable to direct the task to execute the globalize and/or publish tasks you specified when configuring the executable.<br>Example: "**C:\Tasks\RWD.uSchedule.exe" -r** |

**14.** Select the **Settings** tab.




**15.** Complete the following field:

| Field | Description |
|---|---|
| hour(s) | Enable the **Stop the task if it runs for** checkbox, and specify the timeout for this task.<br>Example: **12** |

**16.** Click **OK**.

You can also use the Microsoft Windows Task Scheduler to setup and configure the migration content verification executable (ContentVerification.exe) if you have migrated Info Pak content to a uPerform project. Refer to the companion manual *Managing Content with RWD uPerform* for complete details on migrating Info Pak content.

## Post-Installation Verification Checklist

The following checklist can be used to validate the server installation.

| Task | Reference |
|---|---|
| Create a project on the server. | *Managing Content with RWD uPerform* |
| Add a template to the server, and assign the template to the new project. | *Creating Content with RWD uPerform* and *Managing Content with RWD uPerform* |
| Create a document using the template and check in the new document to the project. (Ensure that there is at least one term in a field/definition table.) | *Creating Content with RWD uPerform* |
| Does the document check in successfully? | *Managing Content with RWD uPerform* |
| Add a definition for the term included in the document. | *Creating Content with RWD uPerform* |
| View the Globalize Queue. Was the document added to the queue? | *Managing Content with RWD uPerform* |
| Select **Globalize Now** to globalize the document. | *Managing Content with RWD uPerform* |
| View the Globalization history. | *Managing Content with RWD uPerform* |
| View the document. Was the new definition inserted into the document? | *Creating Content with RWD uPerform* |
| Add the document to the Publishing Queue. | *Managing Content with RWD uPerform* |
| View the publishing queue, and select **Publish Now**. | *Managing Content with RWD uPerform* |
| View the publish history. Did the document publish successfully? | *Managing Content with RWD uPerform* |

# Chapter 5: Upgrading an Existing uPerform Server

You can upgrade an existing RWD uPerform® server to a newer version.

# Introduction to Upgrading an Existing uPerform Server

If you are upgrading to version 3.0 using Microsoft SQL Server as your database server, you can do so from versions 2.0 and higher. It is recommended that you back up any version 2.X customizations, the Autonomy IDOL Server, and Vignette and the uPerform server software. In addition, it is recommended that you conduct the upgrade during a time when the uPerform server is not being used (for example, during a weekend).

During an upgrade, note that only those controls or fields that require user input are enabled. The upgrade process must be performed in the order specified in this section.

An upgrade log will be created in the root of the collaboration folder <uPerform Location/Collaboration\3.0 UpgradeLog.txt>. This log will contain any debug and/or error messages that occur during the upgrade.

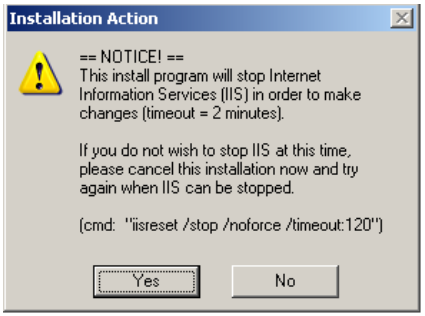
# Upgrading the uPerform Server

If your Collaboration database name starts with a numeric (for example, 4acme), contact RWD Product Support prior to conducting the upgrade.

## *Installing the uPerform Software*

1. Login to the application server.
2. Locate the installation files on your computer.
3. Double-click on **uPerform_Server_Installation.exe** to launch the upgrade.

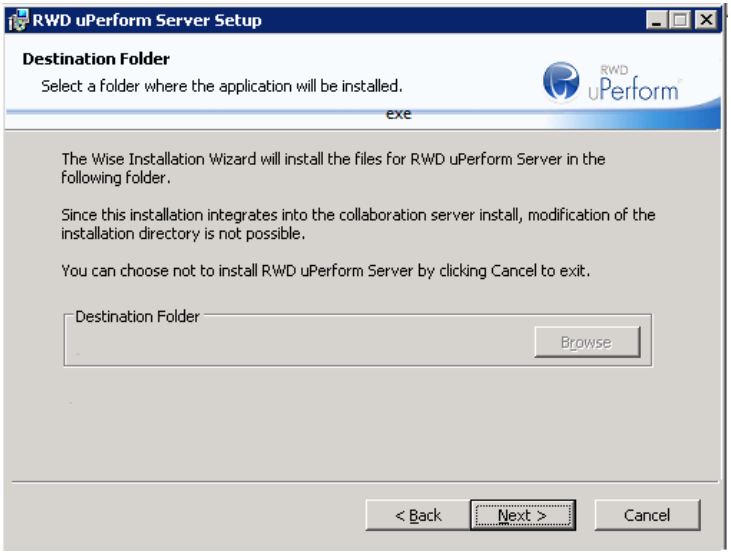
4. Click **Run**.



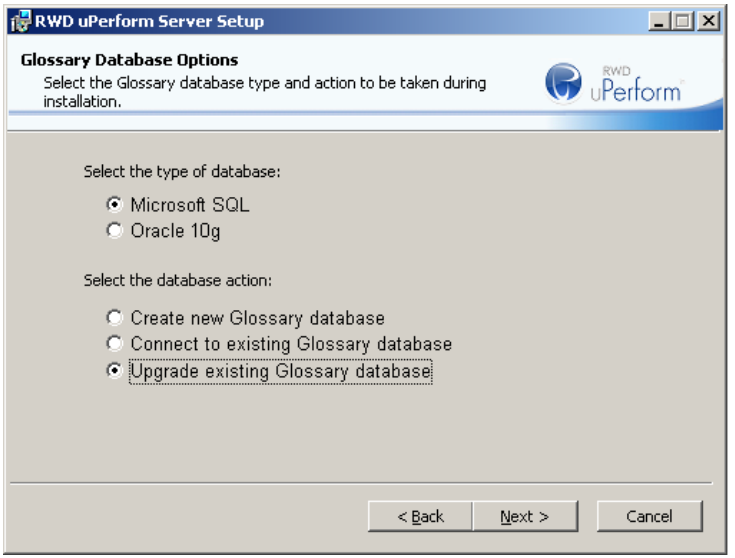

**5.** At the prompt, click **Yes**.

This process may take several minutes.

**6.** Click **Next**.


RWD uPerform Server Setup
Destination Folder
Select a folder where the application will be installed.
RWD uPerform
exe
The Wise Installation Wizard will install the files for RWD uPerform Server in the following folder.
Since this installation integrates into the collaboration server install, modification of the installation directory is not possible.
You can choose not to install RWD uPerform Server by clicking Cancel to exit.
Destination Folder
Browse
< Back
Next >
Cancel

7. Click **Next**.

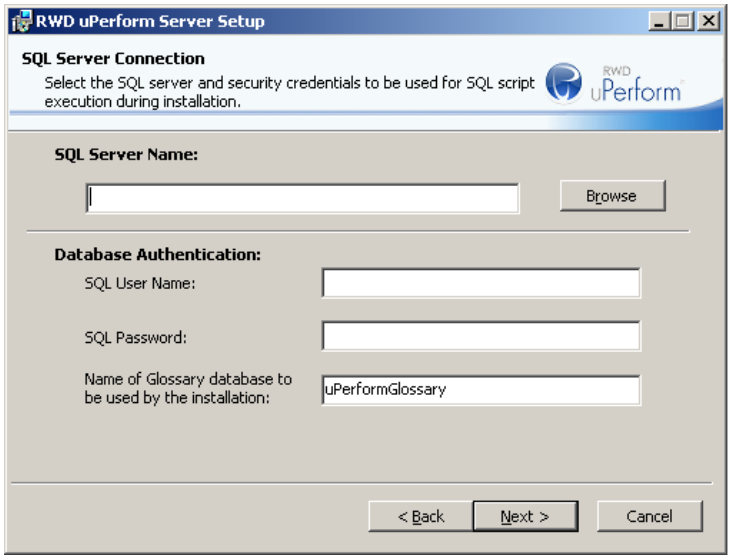



8. Perform one of the following options:

| If You Want To | Then |
|---|---|
| Upgrade a Microsoft SQL database | Select **Microsoft SQL**, and go to Step 9 |
| Upgrade an Oracle database | Select **Oracle 10g**, and go to Step 16. |

9. Select **Upgrade existing Glossary database**.

10. Click **Next**.




**11.** Enter the SQL Server DNS hostname in the **SQL Server Name** field.

**12.** Enter the SQL administrator user name and password to enable upgrade of the existing Glossary database.

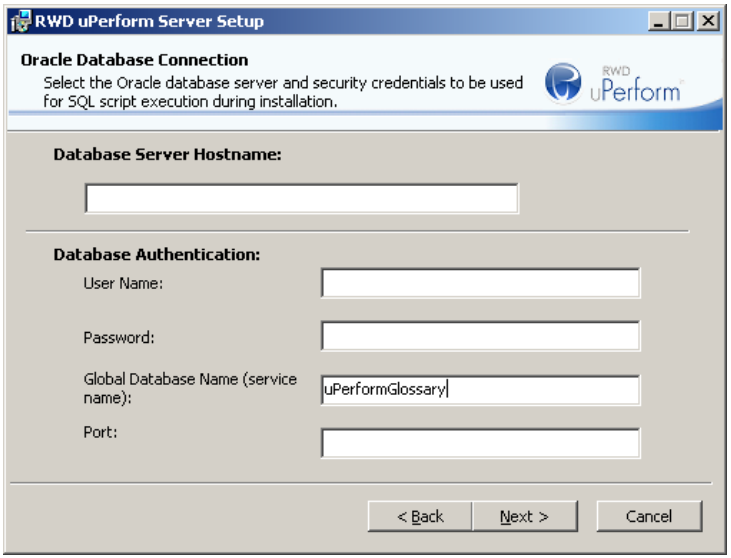
You must have administrative rights to specify a user name and password.

**13.** Enter the name of the existing Glossary database in the **Name of Glossary database to be used by the installation** field.

**14.** Click **Next**.

If you are using SQL Server 2005, the upgrade process runs a check for the READ_COMMITTED_SNAPSHOT command. If the check fails or is set incorrectly, you must run the command after the installation is complete. For more information, “Turning On the READ_ COMMITTED_SNAPSHOT Command” on page 120.

**15.** Go to Step 21.




16. Enter the Oracle DNS hostname in the **Database Server Hostname** field.

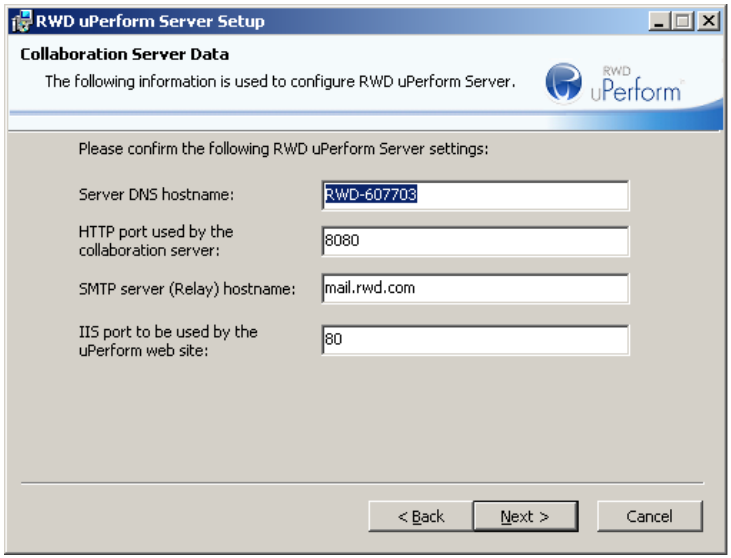
17. Enter the Oracle administrator user name and password to enable upgrade of the existing Glossary database.

You must have administrative rights to specify a user name and password.

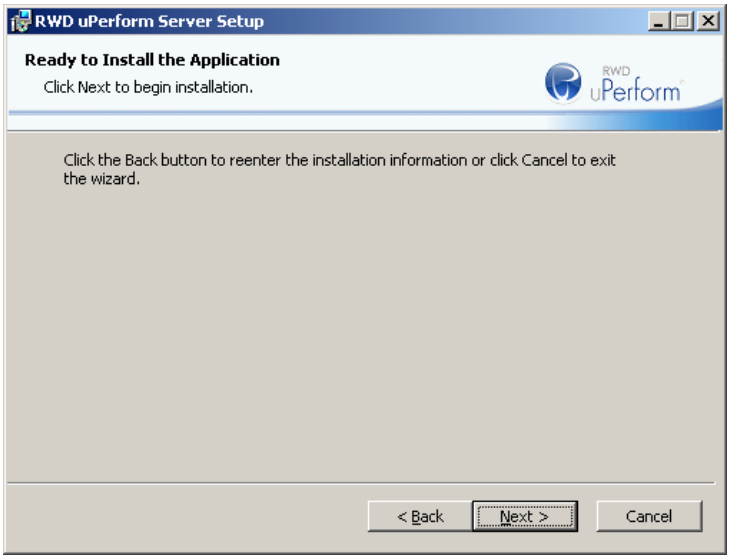
18. Enter the name of the existing Glossary database in the **Glossary Database Name (service name)** field.

19. Enter the Oracle database port number in the **Port** field.

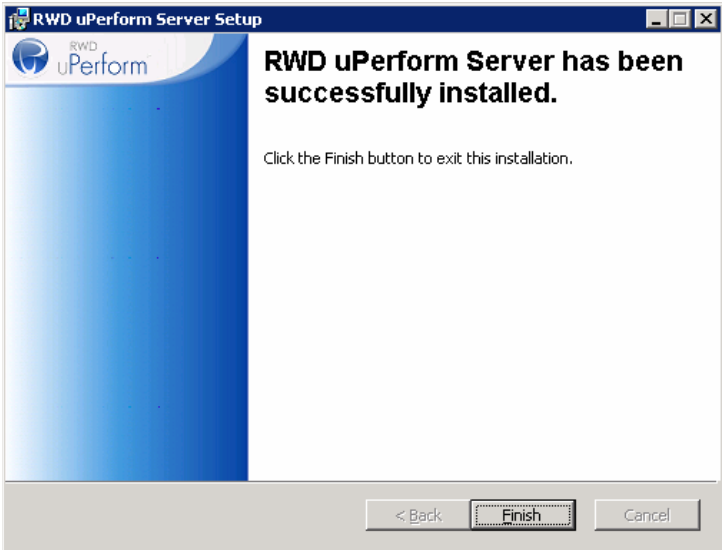
20. Click **Next**.




**21.** Click **Next**.




**22.** Click **Next**.




23. When the upgrade is completed, click **Finish**.

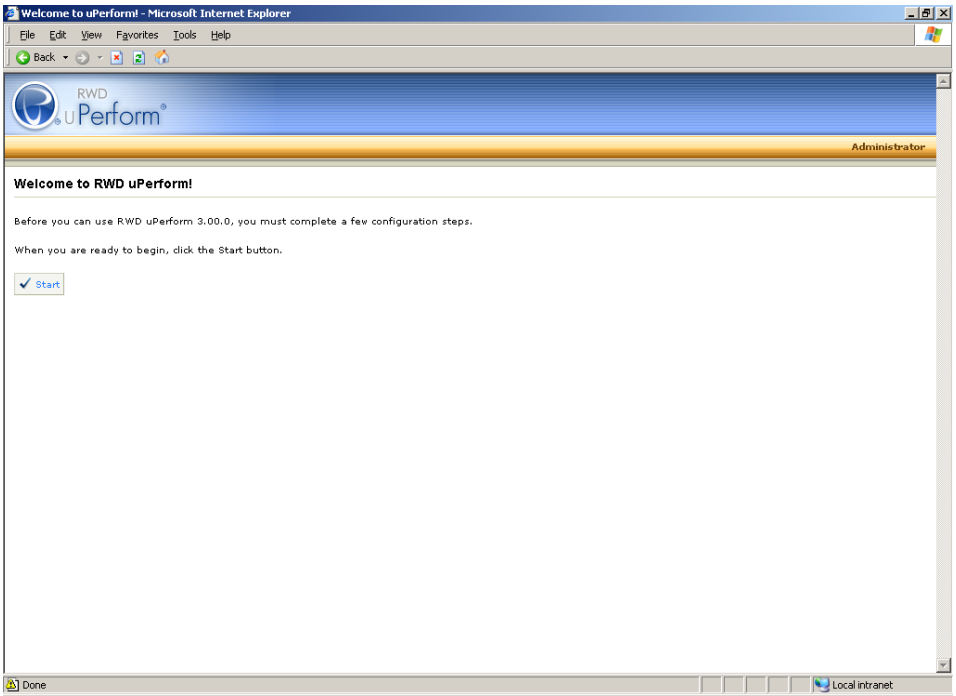
24. In Internet Explorer, enter the uPerform server URL in the format **http://<Collaboration-ServerName>** and login to the server as the **Admin** user to confirm a successful upgrade.

If you are using a port other than the default port 80 for IIS, you must enter the uPerform server URL in the format **http://<CollaborationServerName>:<IIS port number>**.

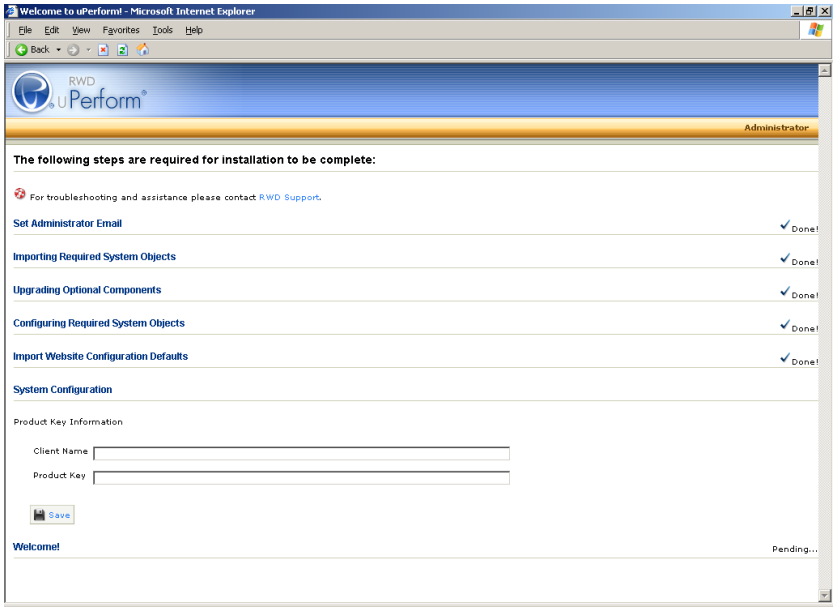
## *Configuring the Server After Upgrade*

1. In Internet Explorer, enter the uPerform server URL in the format **http://<Collaboration-ServerName>** and login to the server as the **Admin** user to confirm a successful upgrade.

If you are using a port other than the default port 80 for IIS, you must enter the uPerform server URL in the format **http://<CollaborationServerName>:<IIS port number>**.



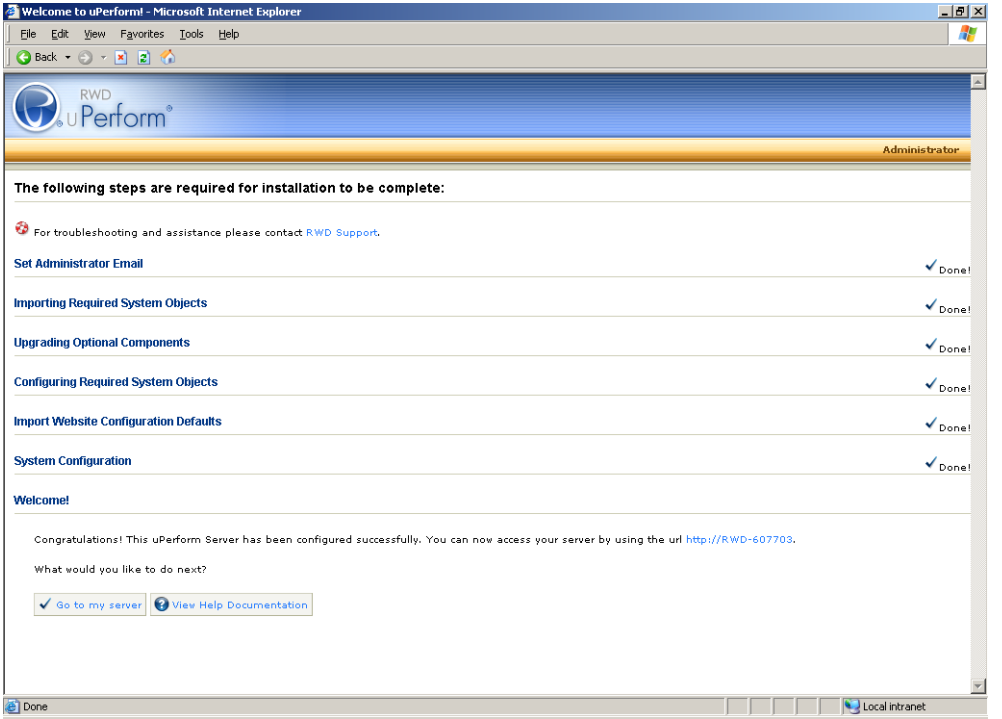

2. Click **Start**.




3. Complete the following fields:

| Field | Description |
|---|---|
| Client Name | Enter the registered client name. |
| Product Key | Enter the product key provided. |

4. Click **Save**.




Do not close Internet Explorer.

5. On the application server, navigate to **[uPerform Location]\Collaboration**.
6. Locate the **3.0 DBUpgrade.sql** file.
7. Copy the **3.0 DBUpgrade.sql** file to the database server.
8. Using SQL Server Management Studio, connect to the updated glossary database.
9. Select **FILE > OPEN > FILE**.
10. Navigate to the **3.0 DBUpgrade.sql** file that was copied to the database server.
11. Ensure the glossary database is selected as the **Active Database** in SQL Sever Management Studio.

12. Click **Execute**.

13. Check for errors in the **Results** pane.

14. In Internet Explorer, click **Go to my server** in the uPerform Server workspace.

Optionally, click **View Help Documentation** to view the PDF help documents for RWD uPerform.

15. Confirm that there are no error lines in the upgrade log file ([uPerform Location]\Collaboration\3.0UpgradeLog.txt).

16. If you have implemented SSO, re-apply the SSO procedure as documented in “Implement SSO Using NTLM Authentication” on page 125.

## Post-Upgrade Verification Checklist

The following checklist can be used to validate the server installation.

| Task | Reference |
|---|---|
| Create a project on the server. | *Managing Content with RWD uPerform* |
| Add a template to the server, and assign the template to the new project. | *Creating Content with RWD uPerform* and *Managing Content with RWD uPerform* |
| Create a document using the template and check in the new document to the project. (Ensure that there is at least one term in a field/definition table.) | *Creating Content with RWD uPerform* |
| Does the document check in successfully, and does the version increment from 2.0 or higher to 3.0 (as a result of glossary activities)? | *Managing Content with RWD uPerform* |
| Add a definition for the term included in the document. | *Creating Content with RWD uPerform* |
| View the Globalize Queue. Was the document added to the queue? | *Managing Content with RWD uPerform* |
| Select **Globalize Now** to globalize the document. | *Managing Content with RWD uPerform* |
| View the Globalization history. | *Managing Content with RWD uPerform* |
| View the document. Was the new definition inserted into the document? | *Creating Content with RWD uPerform* |
| Add the document to the Publishing Queue. | *Managing Content with RWD uPerform* |
| View the publishing queue, and select **Publish Now**. | *Managing Content with RWD uPerform* |
| View the publish history. Did the document publish successfully? | *Managing Content with RWD uPerform* |

# Chapter 6: **Client Overview**

The RWD uPerform® environment also includes an editor interface (the client application). Like the server, the client has several hardware and software requirements for installation and operation.

## Introduction to the Client

The uPerform client is used by authors to create a dual-function document that is both a step-by-step procedural document and an interactive simulation. In addition, authors can use the client to rapidly create eLearning courses.

The client also provides local publishing capability and various server interactions such as check-in/checkout functionality.

For complete details on installing and using the uPerform client, refer to the companion manual *Creating Content with RWD uPerform*.

## Confirming the Required Client Hardware and Software

To install and operate the RWD uPerform client, your environment must meet minimum hardware and software specifications. A complete set of hardware and software requirements for both the uPerform client and server can be found in the *RWD uPerform Technical Specifications,* available on the RWD and SAP knowledgebase websites.

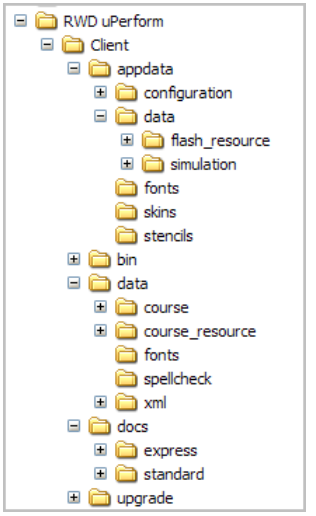
# Installing the Client

## Installing the uPerform Client Software

For detailed instructions on configuring the uPerform client installation and installing the client software, refer to “Chapter 2, Getting Started: Creating Content” in the companion manual *Creating Content with RWD uPerform*.

## Overview of Folders Installed on Client

During client installation, the following folder structure is created on the computer at C:\Program Files\RWD uPerform\Client.




Upon client application launch, a similar folder structure is created in:

- Windows XP: C:\Documents and Settings\[username]\Application Data\RWD\uPerform\version x.xx
- Windows Vista: C:\Users\[username]\App Data\Roaming\RWD\uPerform\version x.xx

These folder structures and the content of the folders must be maintained to ensure proper operation of the client.

A description of the folders available within the above locations follows:

- configuration: Contains recorder configuration files and application settings that are retained from session to session.
- data: Contains files to support the publishing of simulations and courses in Flash format.
- documents: Created in the \Application Data folder structure upon application launch. Stores extracted documents and templates that are currently open in the editor. Do not modify the contents of this folder while the editor is open.
- fonts: Contains font files used for publishing.
- logs: Created in the \Application Data folder structure upon application launch. Contains editor, recorder, publishing, and batch check-in log files.
- skins: Contains skins for the course player background.
- stencils: Contains stencils for developing courses.
- templates: Contains standard and custom templates available from the uPerform editor.
- spellcheck: Contains spellcheck dictionaries in available languages.
- temp: The temporary working directory for the application.
- unpacked: The working directory for skins, stencils, and templates.
- upgrade: Contains files necessary for upgrade from versions 2.0 and higher to version 3.0.
- xml: Contains the XML schema and the transforms (XSLT files) required to create published content. To ensure proper file creation and publishing, do not edit or delete these files.

Additionally, the default location for content created with uPerform is: In Windows XP C:\Documents and Settings\[Username]\My Documents and in Windows Vista: C:\Users\Documents.

# Chapter 7: Uninstalling the Server

The RWD uPerform® application server and search server software can be uninstalled using standard uninstall procedures.

## Introduction to Uninstalling

The following subsections describe the uninstall process for both the application server and the search server. Complete details on uninstalling the client software can be found in *Creating Content with RWD uPerform*.

Uninstalling the uPerform server will not delete the contents of the installation directory nor the contents of your database.

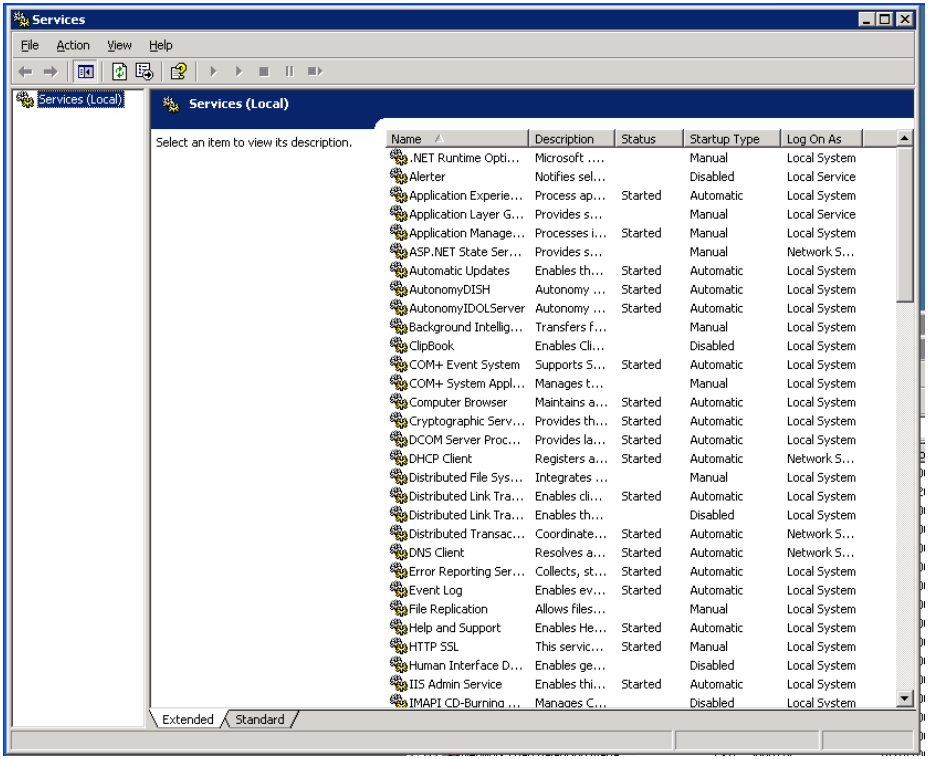
Before you uninstall the uPerform server, you should backup your database.

# Uninstalling

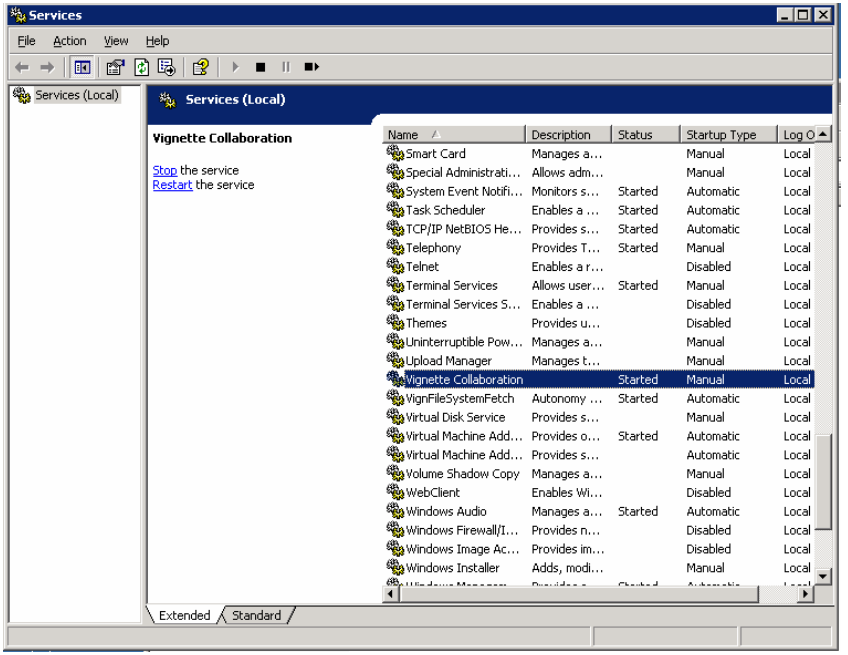
## *Stopping the Vignette Software*

1. Select **START > CONTROL PANEL**.

2. Select **Administrator Tools**.



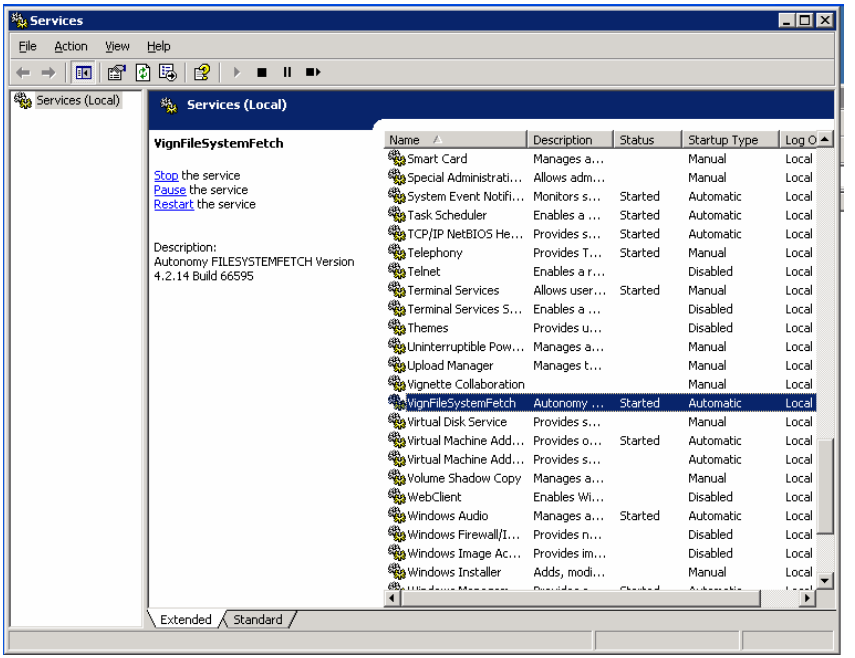

3. Select **Services**.




4. Select **Vignette Collaboration**.

5. Select **Stop the service**.

6. Select **VignFileSystemFetch**.




7. Select **Stop the service**.

8. If you were operating in a clustered environment, open a command prompt and browse to **[Vignette Installation Location]\Collaboration** and enter **bin\stoprmid.bat**.

This step will allow you to delete the C:\Program Files\RWD uPerform folder from the server without restarting the server.

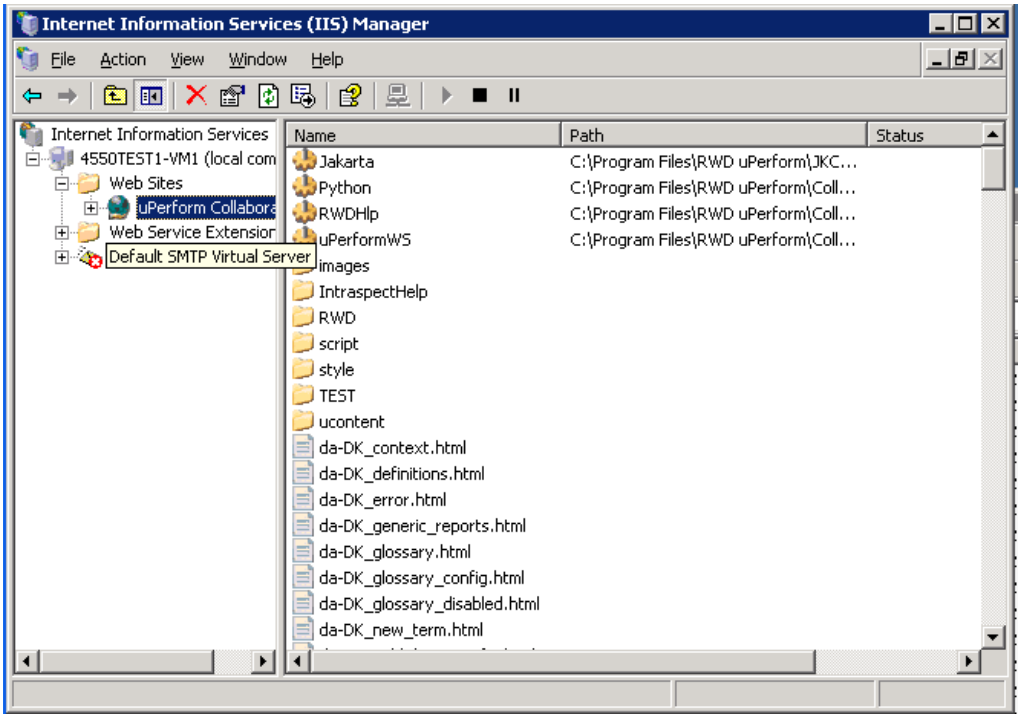
## *Deleting the RWD uPerform Website*

1. Select **START > CONTROL PANEL**.

2. Select **Administrator Tools**.

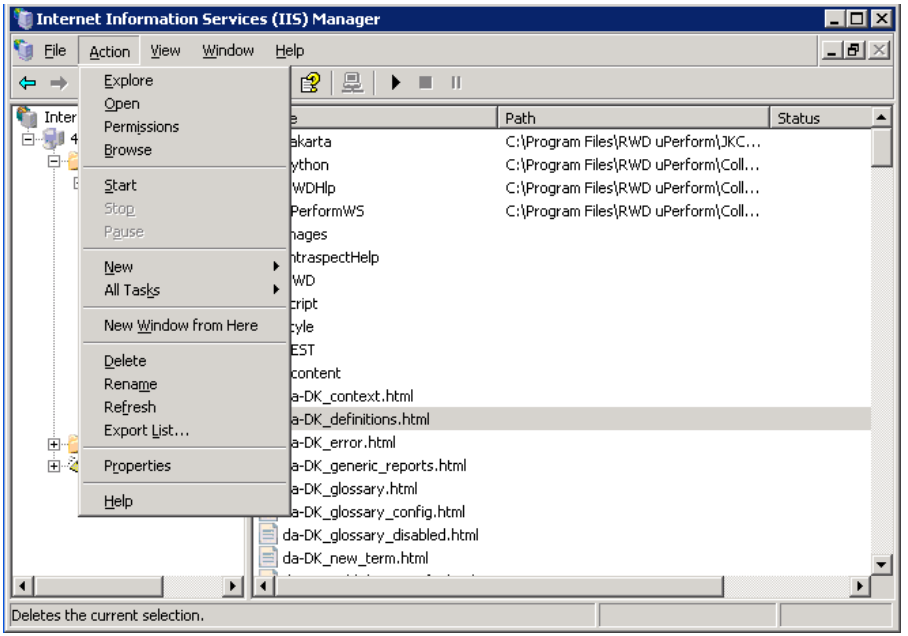
3. Select **Internet Information Services (IIS) Manager**.

4. Select the **uPerform Collaboration** website.




5. Click to stop the service.

6. Select **ACTION > DELETE** to delete the website.




7. Select **Web Service Extensions**.

8. Right-click on **WebDav**, and select **Prohibit**.

9. Right-click on **Jakarta**, and select **Delete**.

10. Right-click on **local computer**.

11. Select **ALL TASKS > RESTART IIS**.

    Do not click **End Now** as this will cause the website to be recreated. Allow the process to run until complete.

12. Close IIS Manager.

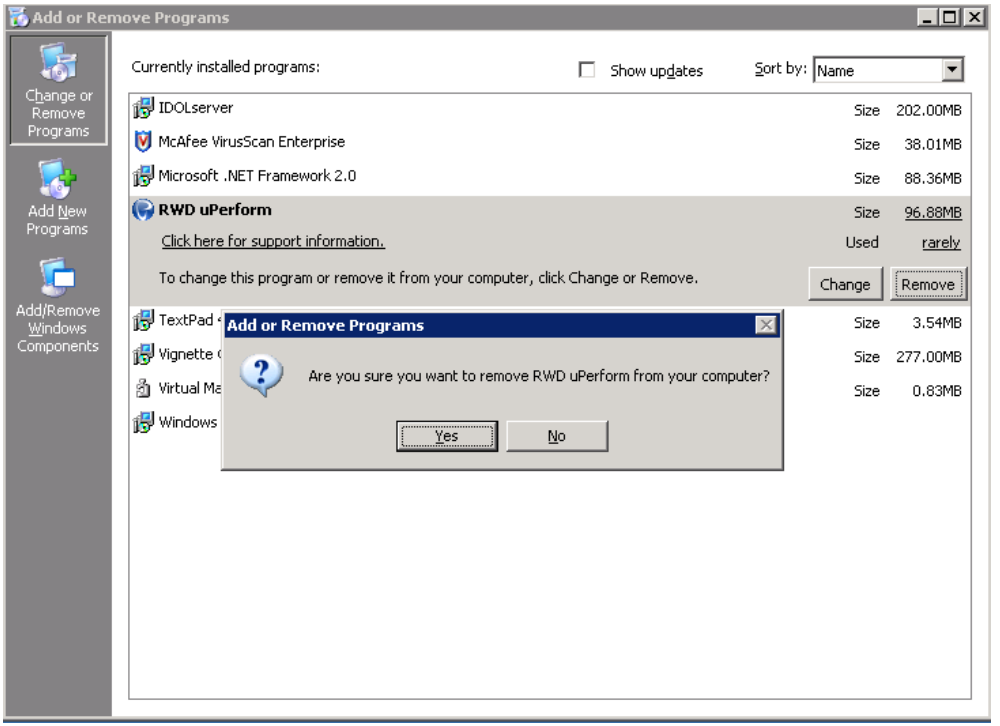
## *Uninstalling RWD uPerform*

1. Select **Start > Control Panel > Administrator Tools**.

2. Select **Add or Remove Programs**.

3. Select **RWD uPerform**.

4. Click **Remove**.




5. Click **Yes**.

6. Click **Finish**.

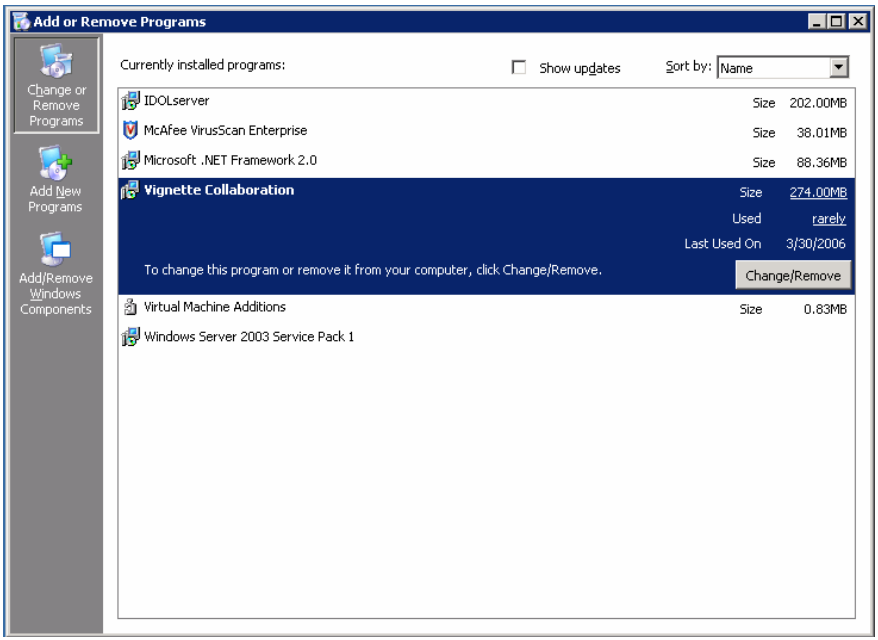
If this process fails (typically because IIS Manager 6.0 has not released some files), restart the server or stop the **IIS Admin** and **World Wide Web Publishing Services** and try the process again.

## *Uninstalling Vignette Collaboration*

1. Select **START > CONTROL PANEL**.

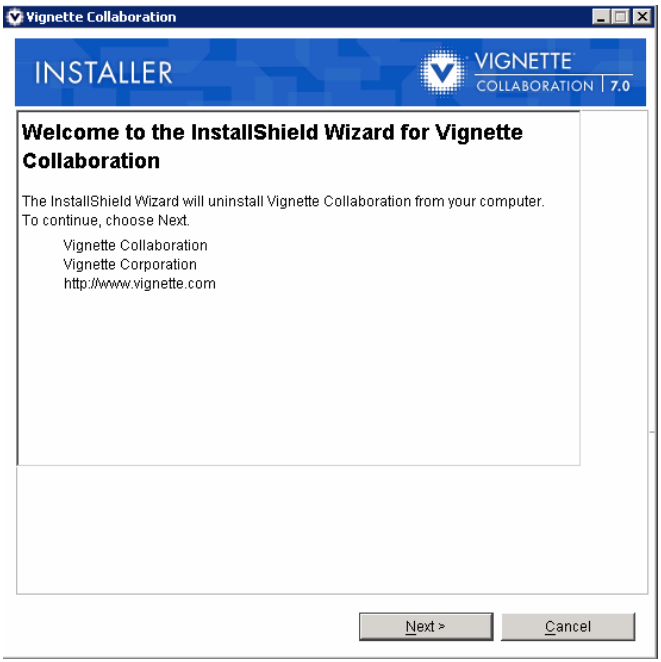
2. Select **Add or Remove Programs**.

3. Select **Vignette Collaboration**.

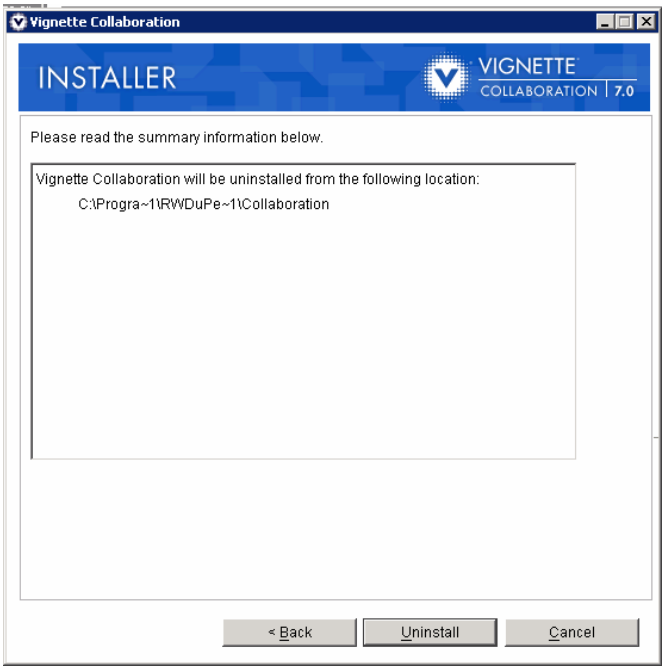



4. Click **Change/Remove**.

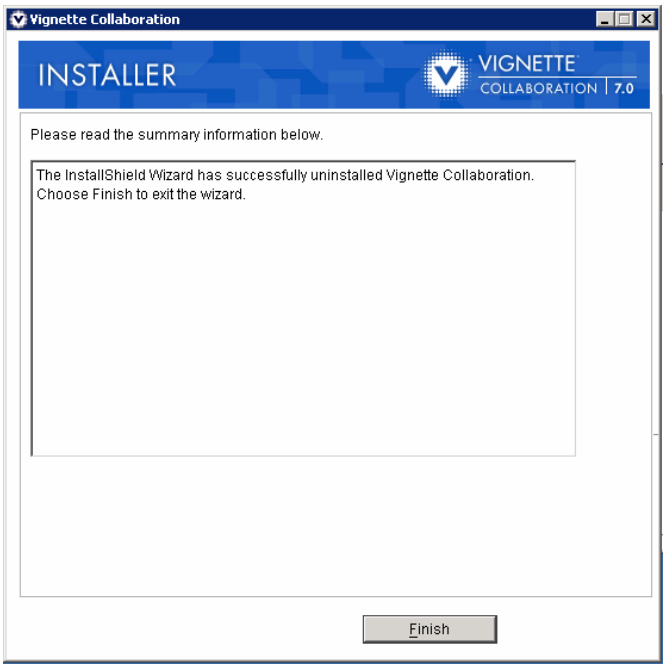
If the uninstaller fails because Vignette processes are running, set the **Vignette Collaboration** service startup type to **Manual** and restart the server.


Vignette Collaboration
INSTALLER
VIGNETTE
COLLABORATION 7.0
Welcome to the InstallShield Wizard for Vignette Collaboration
The InstallShield Wizard will uninstall Vignette Collaboration from your computer.
To continue, choose Next.
Vignette Collaboration
Vignette Corporation
http://www.vignette.com
Next >
Cancel

5. Click **Next**.




6. Click **Uninstall**.




7. Click **Finish**.

## *Deleting the uPerform Directory*

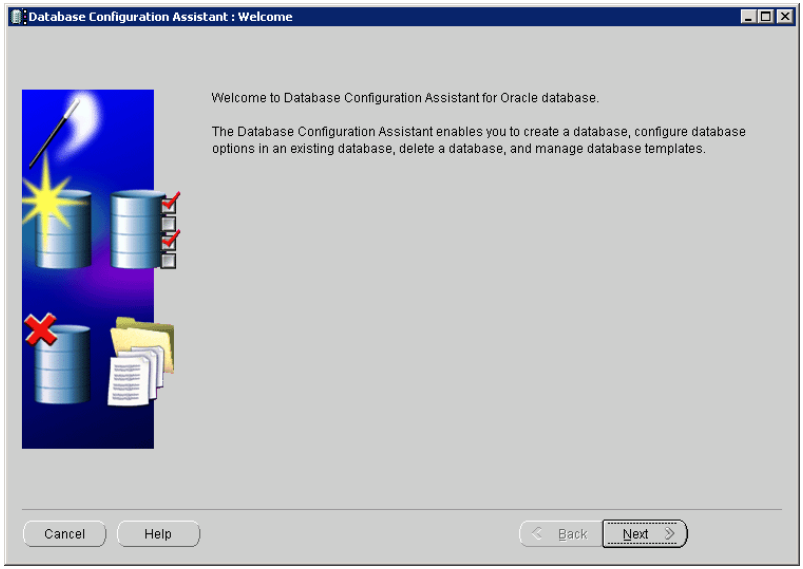
1. Using Windows Explorer, select the **[uPerform Location]\Collaboration** folder.
2. Select **FILE > DELETE**.
3. Click **Yes** at the confirmation prompt.

## *Deleting the Microsoft SQL Server Database*

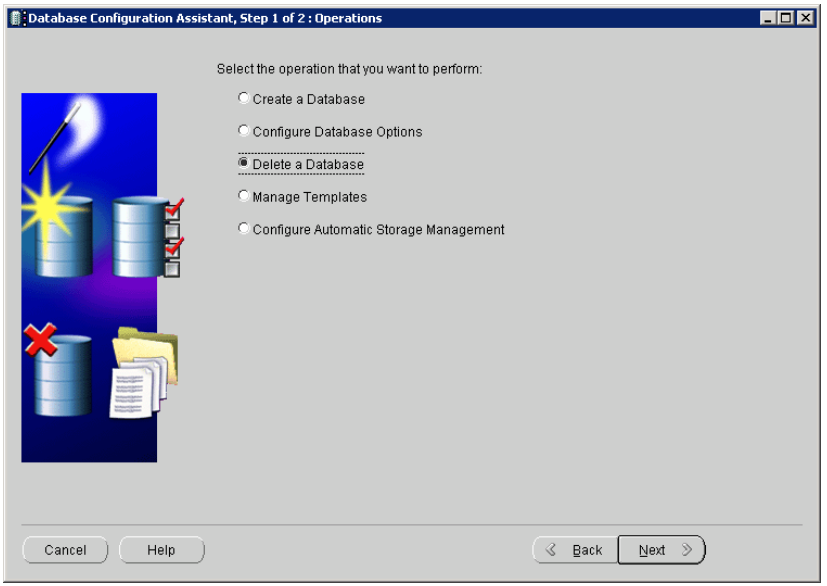
1. Login to the database server.
2. Delete the Glossary and Collaboration databases used by your uPerform instance.

## *Deleting the Oracle Database*

1. Select **START > ALL PROGRAMS > ORACLE - ORADB10G_HOME > CONFIGURATION AND MIGRATION TOOLS > DATABASE CONFIGURATION ASSISTANT**.

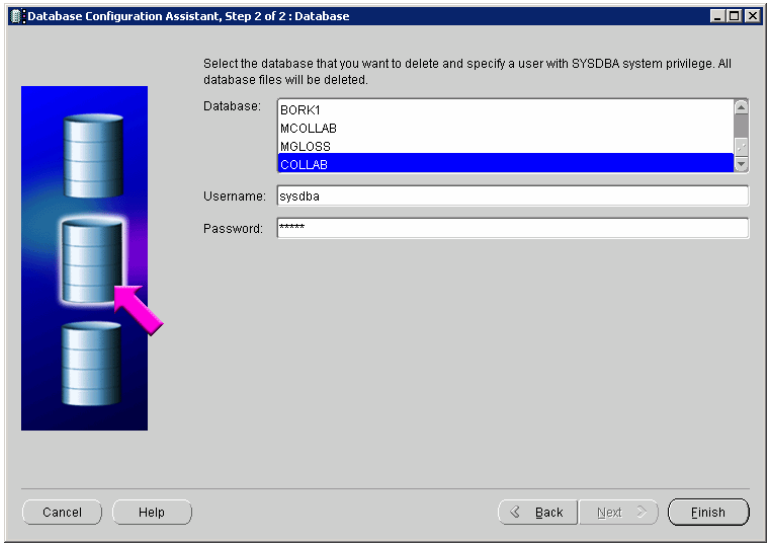



2. Click **Next**.




3. Select **Delete a Database**.

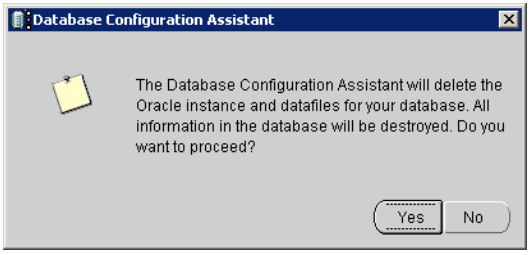
4. Click **Next**.



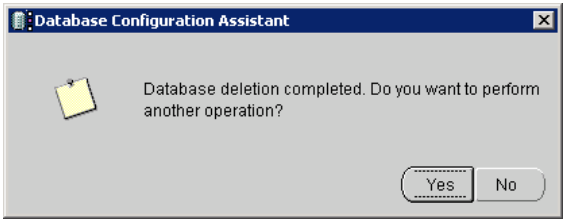

5. Select the Collaboration or Glossary database you want to delete.

6. Enter the username and password for the Oracle administrator.

7. Click **Finish**.




8. Click **Yes**.

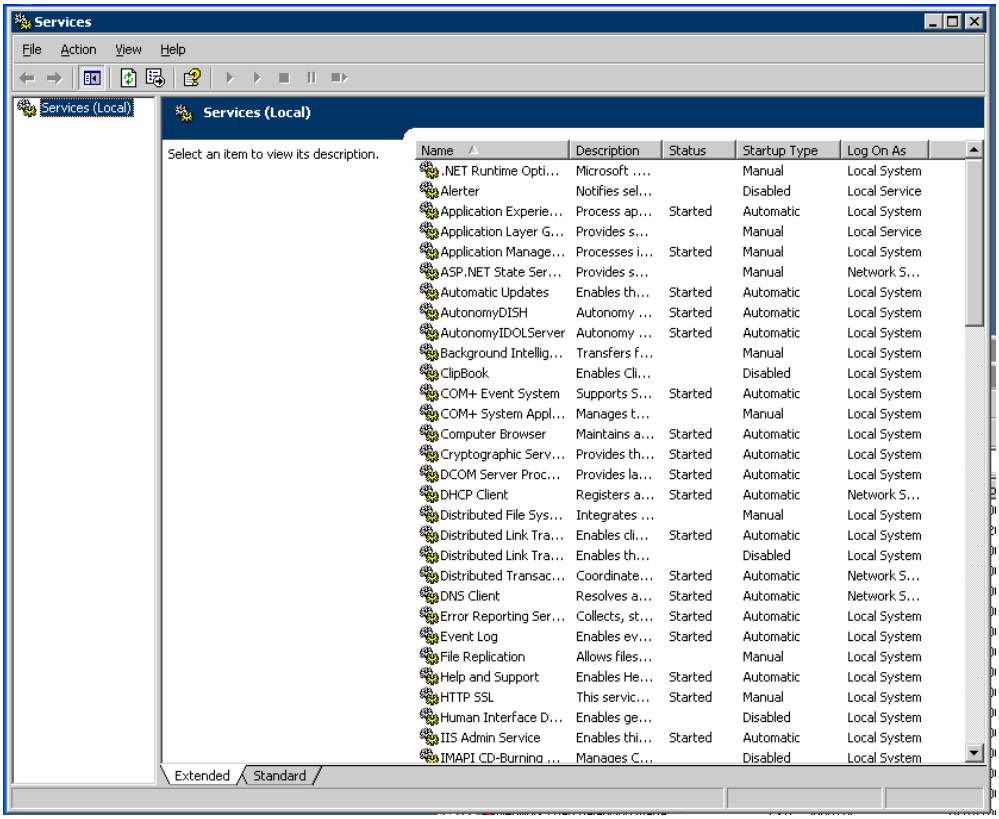



9. Perform one of the following options:

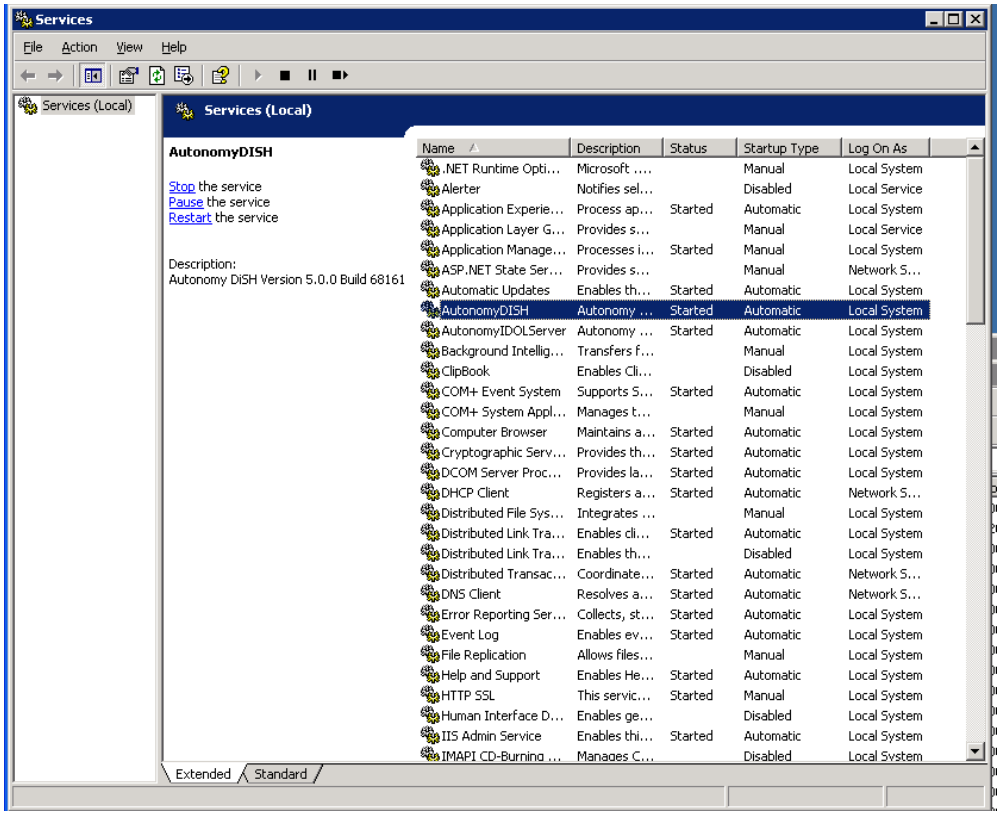
| If You Want To | Then |
|---|---|
| Perform a second uninstall to delete a glossary database | Click **Yes**.<br>Repeat Steps 3 through 9. |
| Perform a second uninstall to delete a collaboration database | Click **Yes**.<br>Repeat Steps 3 through 9. |
| Complete the uninstall | Click **No**. |

## *Uninstalling the Autonomy Search Software*

1. Select **START > CONTROL PANEL**.
2. Select **Administrator Tools**.

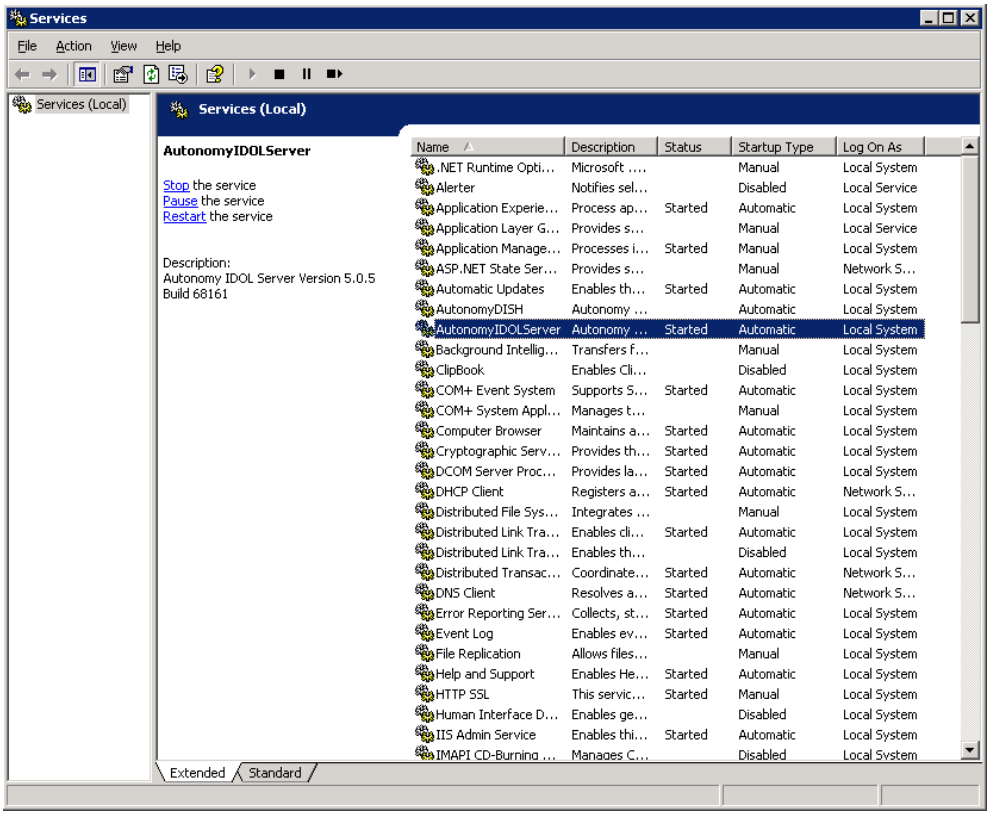



**3.** Select **Services**.




4. Select **AutonomyDISH**.

5. Select **Stop the service**.



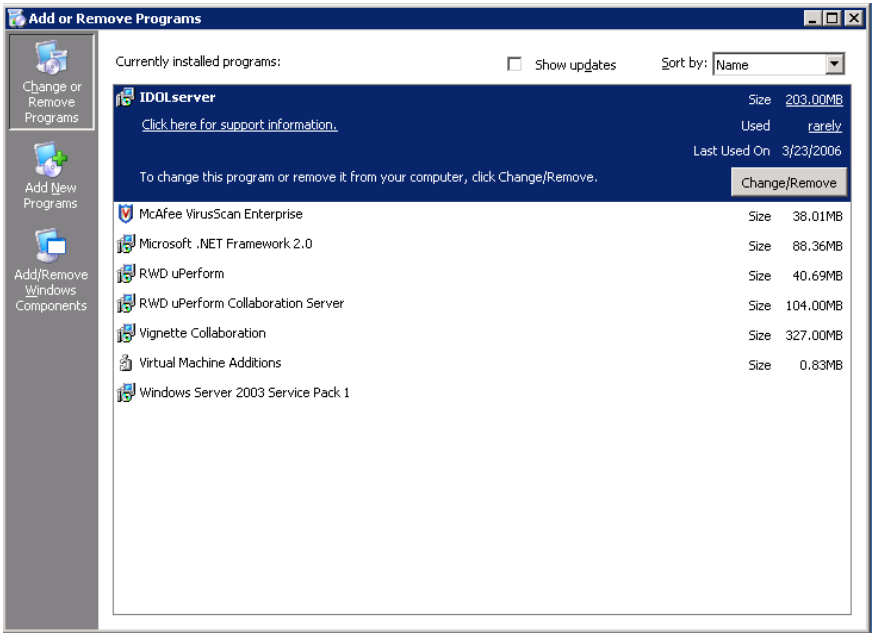

6. Select **AutonomyIDOLServer**.

7. Select **Stop the service**.

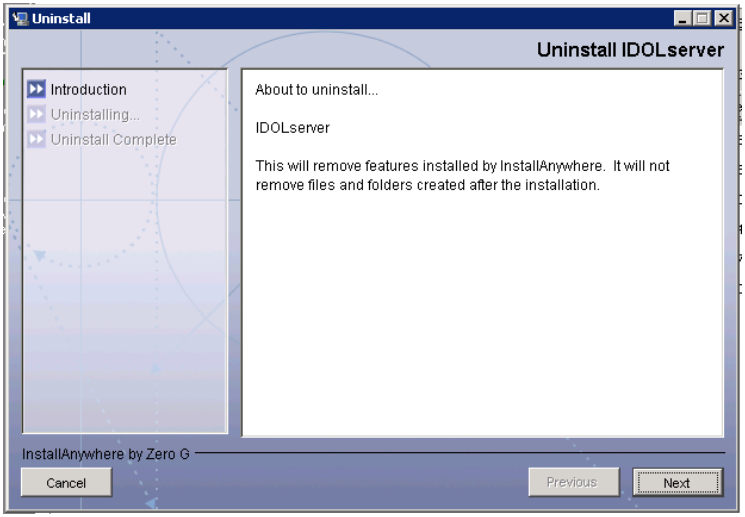
8. Select **START > CONTROL PANEL**.

9. Select **Add or Remove Programs**.

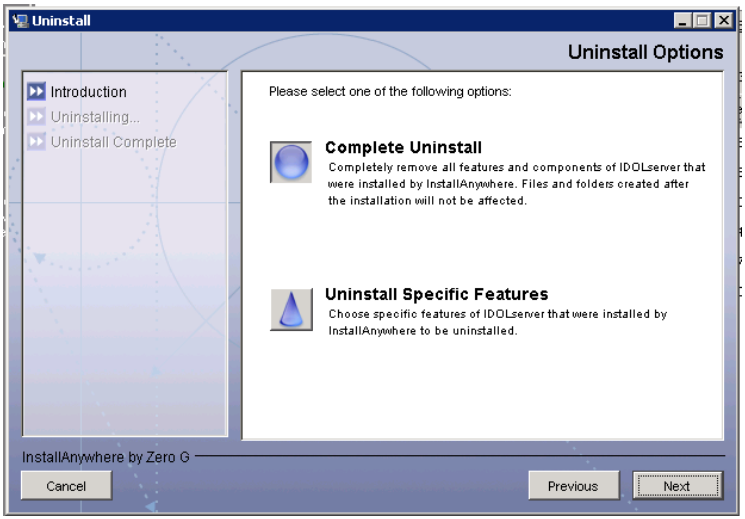
10. Select **IDOL server**.




**11.** Select **Change/Remove**.

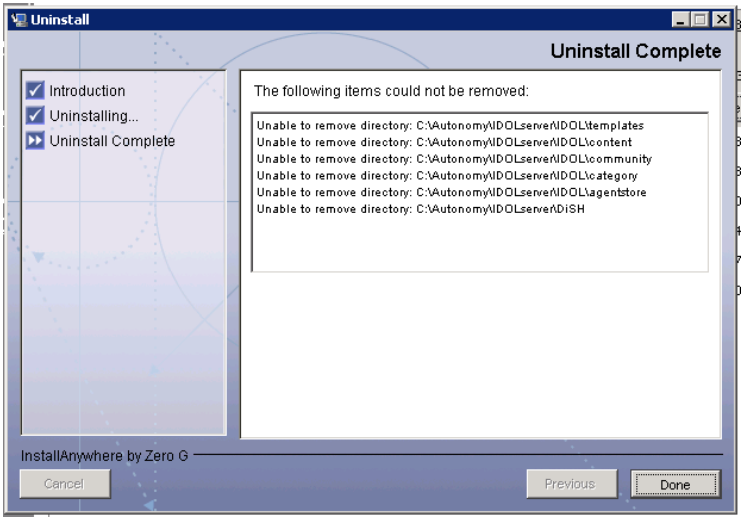



**12.** Click **Next**.



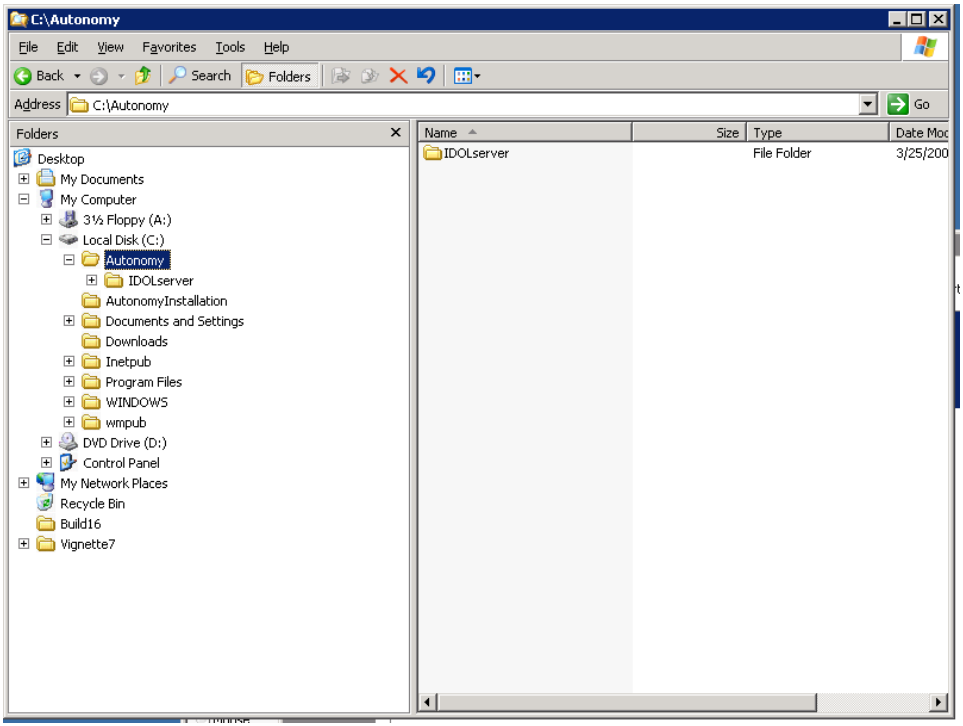

**13.** Select **Complete Uninstall**.

**14.** Click **Next**.




**15.** Click **Done**.

**16.** Navigate to the **Autonomy** folder in Windows Explorer.




17. Delete the **Autonomy** folder.

18. Click **Yes** at the confirmation prompt.

19. Select **START > SHUTDOWN**.

20. Select **Restart** from the drop-down list.

21. Click **OK**.

# Chapter 8: Customizing Options Within uPerform

RWD uPerform® provides three major website customization options: 1) specifying a skin to determine which styles and .xsl files are used on the website; 2) modifying the images, styles, and XSL files that dictate website display; and 3) managing website configuration options such as content filtering and standard phrasing.

## Introduction to Customizing Options

The uPerform website folder contains all of the files necessary to drive the display of your end user website. These files are organized via the use of a customizable website skin, which controls the visual display and layout of your end user website. You can modify and preview your website changes in a staging area prior to modifying your production environment.

Website customization steps include:

- ❒ Create a website folder
- ❒ Create a skin
- ❒ Customize the files within the website folder for use with the skin

The /WWW/RWDuPerform01 website folder on the uPerform application server contains three subfolders used in the customization process:

- ❒ Images: Contains images used on the end user website.
- ❒ Style: Contains customizable cascading style sheet (CSS) files.
- ❒ Transform: Contains customizable Extensible Stylesheet Language (XSL) files.

The /WWW/RWDuPerform01 folder is located in the **[uPerform Installation Location]/ Collaboration** directory. It is recommended that you create a new website folder using the RWDuPerform01 folder as a template.

The layout of uPerform content files and the display of publications intended for your end users can be modified via the template editor. For complete details on the template editor, refer to the companion manual *Managing Content with RWD uPerform*.

# Customizing the Delivered Website Folder

The /WWW/RWDuPerform01 folder is delivered with the RWD uPerform server software and is stored on the uPerform application (web) server. This folder contains all of the image, style, and transform files that control the formatting and display of the end user website.

Before creating a skin and customizing your website, you must create a new folder based on the default RWDuPerform01 folder.

## *Creating a Custom Website Folder*

1. Select the /WWW/RWDuPerform01 folder on the application server.
2. Copy the folder.
3. Paste the copied folder into the /WWW folder.
4. Rename the new folder using a name that is meaningful to your end user website (for example, AcmeERP01).

   Do not use the text “RWDuPerform” in your new folder name as RWD may deliver additional ‘RWDuPerform’ folders in future uPerform releases.
5. Refer to the following subsections for guidance on modifying the contents of your new custom folder.

# Using Cascading Style Sheets

A cascading style sheet (CSS) file allows you to maintain centralized settings for formatting options (for example, font and font size) in one file for use by multiple HTML files. uPerform uses CSS files to control the display of the end user website. The CSS files are stored on the uPerform application server in the /WWW/[MySite]/Style folder.

Before making changes to CSS files, you must create a custom folder. For more information, refer to “Customizing the Delivered Website Folder” on page 201.

## Guidance on Modifying Cascading Style Sheets

uPerform includes three CSS files:

- InfoPakContent.css: Controls the display of Info Pak content presented to the user.
- uPerformEndUser.css: Controls the display of website pages presented to the user.
- uPerformEndUserDocument.css: Controls styles on the uPerform document page.

You can modify these files to incorporate your corporate standards (for example, font and color scheme).

A complete tutorial on modifying cascading style sheets is beyond the scope of this manual. Several books and websites discuss this topic in detail. In particular, the World Wide Web Consortium (W3C) provides helpful information at http://www.w3.org/Style/CSS/.

The following table provides general guidance on performing common customization tasks in the style sheets.

| If You Want To | Go To | Modify |
|---|---|---|
| Customize the logo and other elements in the top banner | The **titleBar** section of the CSS file. | **#titleBar** to set the dimensions, background color, and image URL for the banner.<br>**#titleBarLogo** to set the logo dimensions and URL.<br>**#titleBarNav** to set the remaining banner image and dimension options.<br>**#titleBarNav #searchGo** to style the Search Go button.<br>**#titleBarNav #P1** to style the Search text input box. |
| Change the background color in the content area | The **body** tag and **#contentWrapper** style in the end user CSS file. | **body** tag to specify font, color, and background.<br>**#contentWrapper** to specify height and background. |
| Modify the colors used in the left navigation bar | The **navBar** and **navBarToggle** sections in the CSS file. | **navBar** to specify the overall display of the left navigation bar and to set the font size and font color on header tags within the navigation bar.<br>**.commandbarToggleBtnShow** and **.commandbarToggleBtnHide** to modify the toggle button itself and the width of the navigation bar.<br>Styles that include 'Links' in the name control the display of buttons, including the color and graphic. |

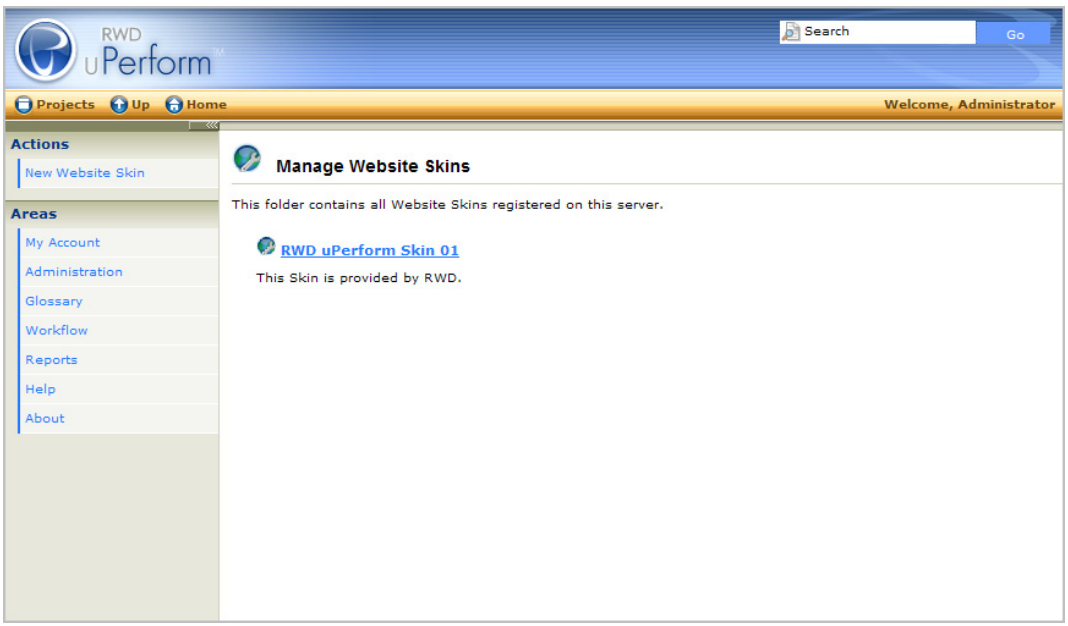
# Working with Website Skins

Website skins allow you to customize the display of your end user website. You create a skin by specifying styles and .xsl files from a custom /WWW/[MySite] folder. You can choose as many or as few .xsl files as you want to display on the end user view. However, each page that will display to the end user must have an .xsl file specified.

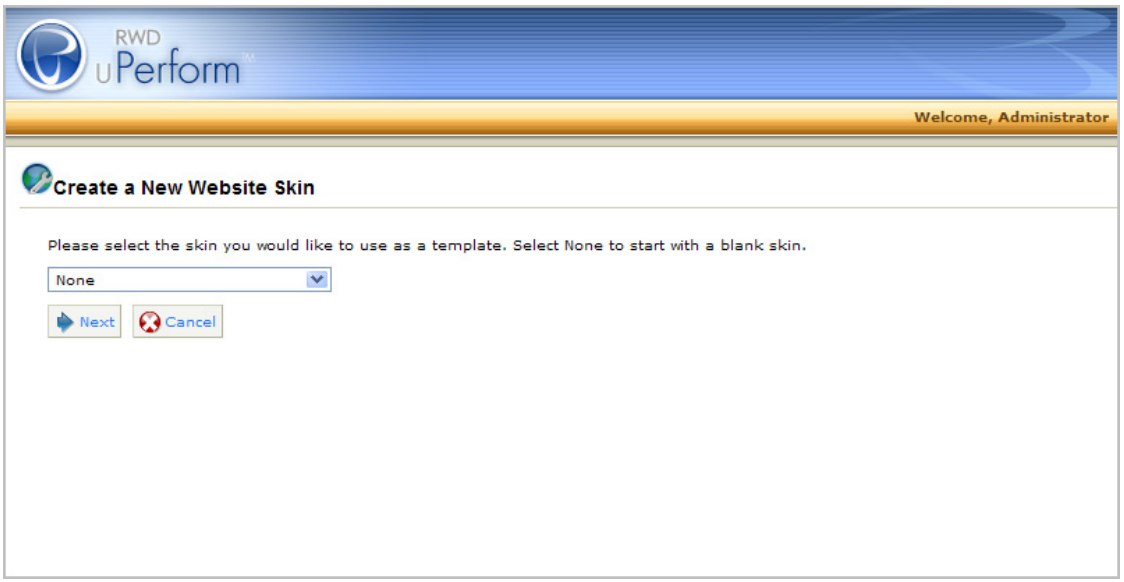
In addition, you can use an existing skin as a template for creating a new skin.

## *Creating a Website Skin*

1. Click **Administration**.
2. Click **End User Website Configuration**.
3. Click **Manage Website Skins** under *End User Website Configuration*.



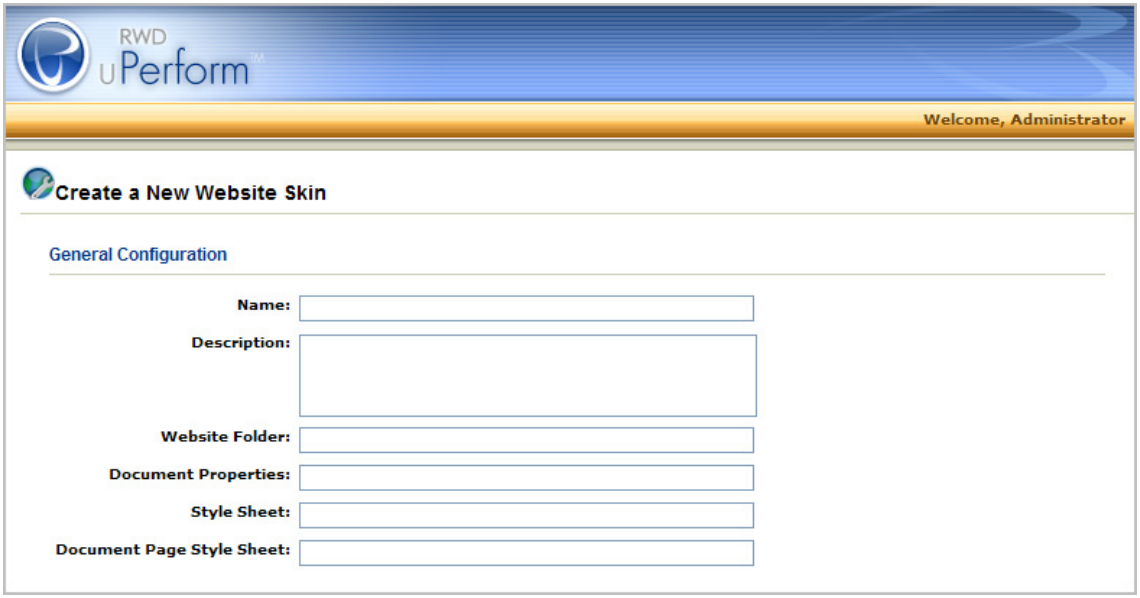
4. Click **New Website Skin**.




5. Perform one of the following options:

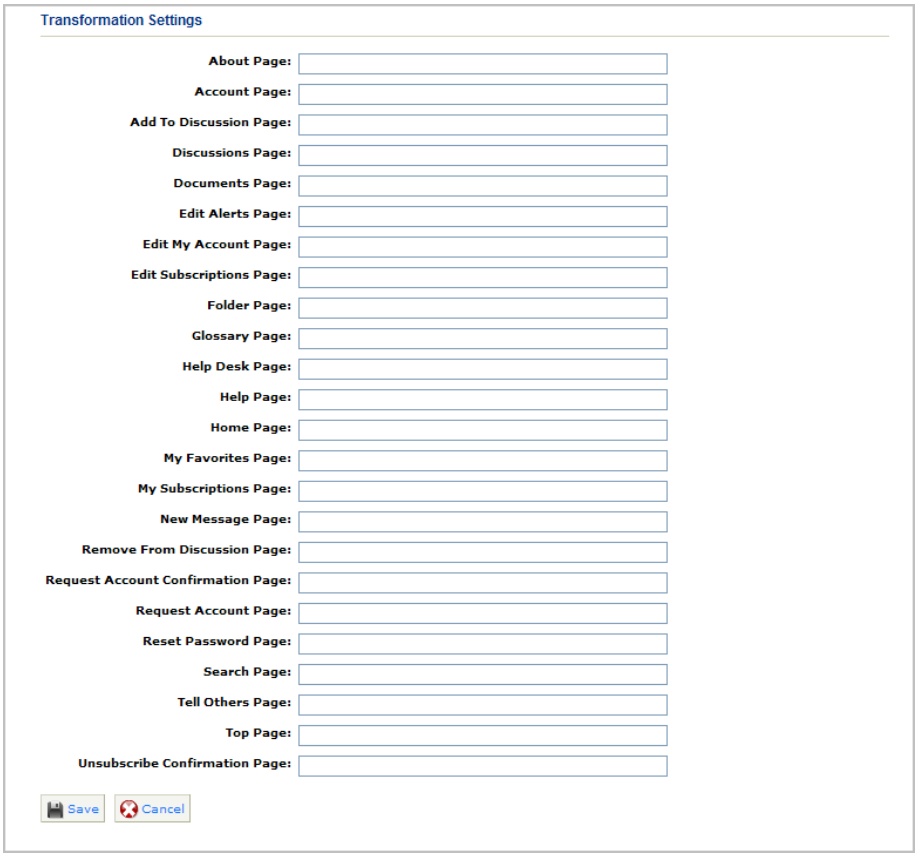
| If You Want To | Then |
|---|---|
| Create a blank website skin | Select **None** from the drop-down list. |
| Select an existing website skin to use as a template | Select a skin from the drop-down list. |

6. Click **Next**.




7. Under **General Configuration**, edit the following fields:

| Field | Description |
|---|---|
| Name | Title of the website skin. |
| Description | Description of the website skin. |
| Website Folder | Folder name for your custom site.<br>Example: **MySite** |
| Document Properties | Which properties of the document are provided in the .xml<br>Example: **transaction_code** |
| Style Sheet | The .css file from WWW/[MySite]/style folder that is used on all pages except the document page. |
| Document Page Style Sheet | The .css file from WWW/[MySite]/style folder that is used on the document page. |




**8.** Under **Transformation Settings**, perform one of the following options:

| If You Want To | Then |
|---|---|
| Create new transformation settings | Enter the name(s) of the .xsl files used to display content on the end user website. For a list of these files, refer to "Guidance on XSL Transformations" on page 209.<br>Example: **About page:** about.xsl |
| Edit the transformation settings from an existing template | Edit the name of the .xsl file as necessary.<br>All pages that will display to the end user must have an .xsl file specified. |

9. Click **Save**.

10. Perform one of the following actions:

| If You Want To | Then |
|---|---|
| Preview the website customizations | For more information, refer to “Using XSL Transformations” on page 209. |
| Specify the website folder to activate your customizations on the production website | For more information, refer to “Using General Configuration Settings” on page 213. |

# Using XSL Transformations

An Extensible Stylesheet Language (XSL) file allows you to control the layout of rendered XML pages. uPerform uses XSL files to control the display of the website. The XSL files are stored on the uPerform application server in the /WWW/[MySite]/Transform folder. Before making changes to XSL files, you must create a custom folder. For more information, refer to “Customizing the Delivered Website Folder” on page 201.

## Guidance on XSL Transformations

The /WWW/[MySite]/Transform folder contains the following XSL files:

- about.xsl: Controls the display of the “About” page.
- account.xsl: Controls the display of the “My Account” page.
- adddiscussion.xsl: Controls the form for end users to become a discussion recipient.
- confirmation: Controls the “Request Account” confirmation page.
- context.xsl: Controls the display of “bread crumb” text and is not available in the website skin.
- discussion.xsl: Controls the display of the “Website Discussion” page.
- document.xsl: Controls the display of the content cover page.
- editmyalerts.xsl: Controls the display of the “Edit My Alerts” page.
- editmyfavorites.xsl: Controls the display of the “Edit my Favorites” page.editsubscription.xsl: Controls the display of the “Subscribe” page for documents, folders, and discussions.
- editmysubscriptions.xsl: Controls the display of the “Edit My Subscriptions” page.
- folder.xsl: Controls the display of the project title page and “Areas” folders.
- form.xsl: Controls the display of the “Edit My Account Page” and the “Add New Message” and “Request Account” pages.

- ❒ glossary.xsl: Controls the display of the glossary page.
- ❒ header.xsl: Controls the display of the website header. This is a global modification and is not available in the website skin.
- ❒ help.xsl: Controls the display of the help page.
- ❒ helpdesk.xsl: Controls the display of the help desk page.
- ❒ home.xsl: Controls the display of the home page.
- ❒ imports.xsl: Imports common transforms on all pages and is not available in the website skin.
- ❒ nav.xsl: Controls the display of the navigation toolbar and is not available in the website skin.
- ❒ objectimages.xsl: Controls the display of images on the website, ensures that the correct image is linked to the correct object, and is not available in the website skin.
- ❒ removediscussion.xsl: Controls the form for end users to remove themselves from a discussion.
- ❒ resetpassword.xsl: Controls the display of the “Reset Password” page.
- ❒ search.xsl: Controls the display of the “Search Results” page.
- ❒ tellothers.xsl: Controls the display of the “Tell Others” page.
- ❒ top.xsl: Controls the display of the “Projects” page
- ❒ unsubscribe.xsl: Controls the display of the “Unsubscribe” page.

A complete tutorial on XSL transformation is beyond the scope of this manual. Several books and websites discuss this topic in detail. In particular, the World Wide Web Consortium (W3C) provides helpful information at http://www.w3.org/Style/XSL/.

The /WWW/Schemes folder contains .xsd files that assist in defining the schema for the XSL files. These .xsd files should be used as a reference only; do not make changes to these files.

# Using Image Files

You can overwrite the delivered images to customize logos and icons that display on the website. Image files are stored on the uPerform application server in the folder /WWW/[MySite]/Images.

Before making changes to image files, you must create a custom website folder. For more information, refer to “Customizing the Delivered Website Folder” on page 201.

## *Customizing Image Files*

To replace a delivered image file with a custom image (for example, your company logo), perform the following steps:

1. To retain a copy of the original delivered image file, rename the file (for example, add a “.old” extension to the filename).
2. Navigate to the location of your custom image file.
3. Copy the file.
4. Paste the file into the /WWW/[custom website folder]/Images folder.
5. Rename the file using the name of the original image file in the custom folder.

## Previewing the Website Customizations

After customizing the website, you should preview your changes prior to activating the changes in your production environment.

To preview the website changes, append the following to the uPerform website URL:

**?mode=EU_<MySiteSkin>**

For example: **http://www.AcmeSalesTraining.com/gm/?mode=EU_[MySiteSkin]**

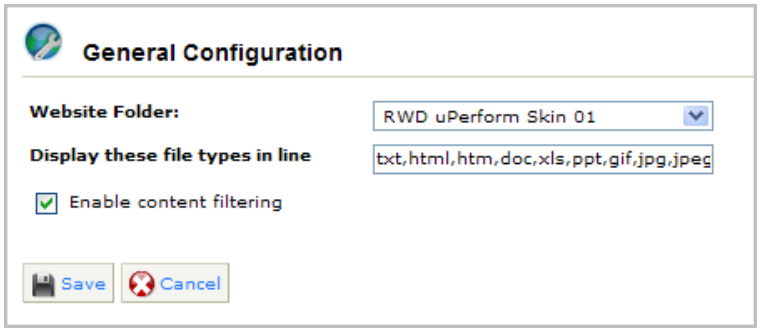
If you use browser caching, you may need to clear your browser cache in order to view changes made to the website.

To activate your customizations in your production website, refer to “Using General Configuration Settings” on page 213.

# Using General Configuration Settings

General configuration settings allow you to specify the website display to present to your end users (default or custom), enable content filtering, and specify to open files inline.

1. Click **Administration** on the left menu of the server workspace.
2. Click **End User Website Configuration** in the *Administration* area.
3. Click **General Configuration** in the *End User Website Configuration* area



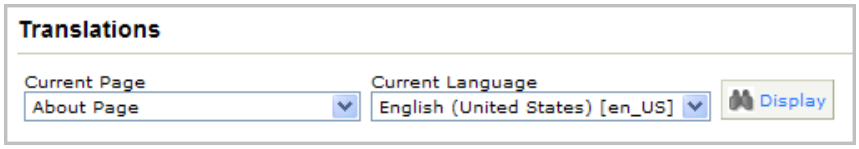

4. Complete the following fields:

| Field | Description |
|---|---|
| Website Folder | Select the website skin to be used. |
| Display these file types in line | Enter the file extension(s) for the file type(s) you want to display on the end user website in an inline frame. File types not listed will open in a new window.<br>Separate multiple file types with a comma.<br>Do not include a period (.) before the file extension. |
| Enable content filtering | Select this option to enable content filtering on the end user website. |

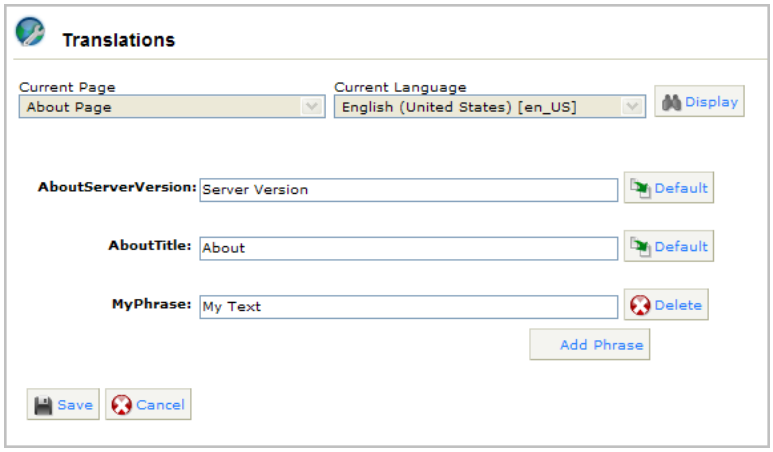
5. Click **Save**.

### *Working with Phrases*

1. Click **Administration** on the left menu of the server workspace.
2. Click **End User Website Configuration** in the *Administration* area.
3. Click **Translations** in the *End User Website Configuration* area.

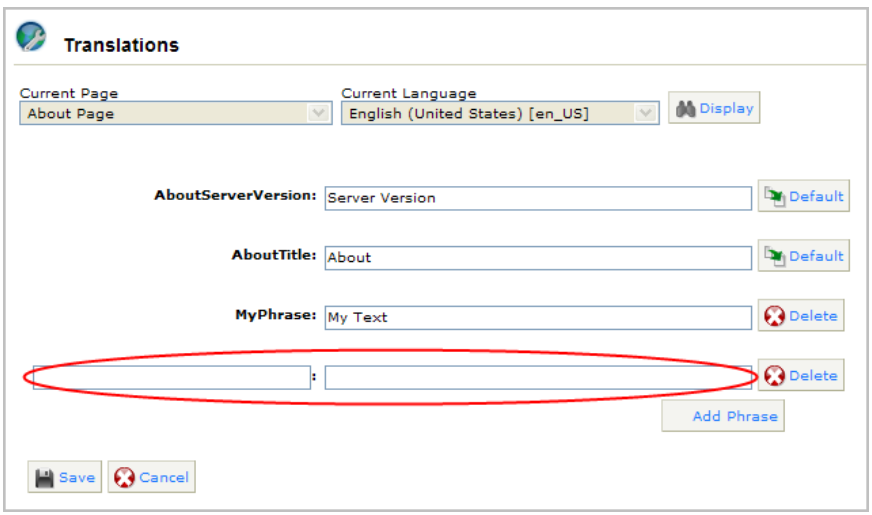



4. Select the page containing the phrase to be modified from the **Current Page** drop-down list.
5. In the **Current Language** field, select the language in which the phrase is to be modified.
6. Click **Display**.



**7.** Perform one of the following options:

| If You Want To | Then |
|---|---|
| Edit the standard phrases | Edit the standard phrase(s) to specify the desired custom phrase.<br>To revert to the standard phrase, click **Default** to the right of the phrase.<br>Go to Step 10. |
| Add a phrase | Click **Add phrase**.<br>Go to Step 8. |
| Delete a phrase | Click **Delete** next to the phrase you want to delete.<br>Click **OK**.<br>You cannot delete standard uPerform phrases.<br>Go to Step 10. |




**8.** Enter a phrase title in the left-most field.

The title can only contain characters A-Z. Special characters, numbers, and spaces are not permitted.

9. Enter the corresponding phrase in the right-most field.

10. Click **Save**.

You must enter the modified phrase in all desired languages by repeating Step 5 through Step 8 for each language.

# Chapter 9: Managing the Recycle Bin

The RWD uPerform® server includes recycle bin functionality to provide access to deleted content. From a recycle bin, you can restore deleted content as needed.

## Introduction to the Recycle Bin

The uPerform recycle bin acts as a ‘safety net’ from which to restore deleted content. When a user deletes content objects, discussions, folders, and subfolders, these items are moved to a recycle bin; they are not permanently deleted from the uPerform server.

There is one recycle bin for each uPerform project. Only administrators have access to the recycle bin.

A deleted project is not sent to the recycle bin. A deleted project, including all of its documents, messages, and folders, cannot be restored.

# Restoring from the Recycle Bin

An administrator can restore items from the recycle bin. When restored, the item is returned to its original location in the uPerform document library. The restore operation sets the owner of the object to the user who restored the item.

A deleted project is not sent to the recycle bin. A deleted project, including all of its documents, messages, and folders, cannot be restored.

## *Restoring an Item From the Recycle Bin*

1. Log into the uPerform server via a web browser.
2. Click

.
3. Select the project from which the item was deleted.
4. Click **Recycle Bin** on the left menu.
5. Click on the hyperlink of the object to restore.
6. Click **OK** to restore the object.

# Chapter 10: Performing Routine Server Maintenance

To ensure optimal operation of your RWD uPerform® server environment, several routine maintenance tasks should be performed regularly. These tasks include executing periodic backups and regularly reviewing available logs.

# Introduction to Routine Server Maintenance

In addition to your crucial backup activities, you should also plan to perform other routine system maintenance tasks on the uPerform servers.

## Rebooting the Servers

If you need to reboot the search server or the database server, shutdown the uPerform environment as described in "Shutting Down the uPerform Environment" on page 224 before rebooting.

At startup, one of the first processes executed by the uPerform server application is to communicate with the search server. If the search server is not running, the indexing service may fail. Consequently, after rebooting, the search server must be running before starting the uPerform application server. Confirm the search server is running by referring to "Testing the Search Functionality Configuration" on page 101. After ensuring the search server is running, refer to "Starting Up the uPerform Environment" on page 224.

## Backups

A regularly-scheduled backup of all servers in the uPerform landscape is strongly suggested. In addition, you should also perform the following on a regularly-scheduled interval:

- ❒ Collaboration and Glossary database backups using the storage application recommended by your IT department.
- ❒ [uPerformLocation]\Collaboration\WWW\uContent folder backup using conventional file backup applications and procedures.

## System Maintenance Tasks

On a periodic basis, perform the following routine tasks on the uPerform servers:

- ❒ Periodically reboot the uPerform application server.
- ❒ Defragment the server disk drives to improve daily performance.
- ❒ Periodically change the administrator password on all uPerform servers.
- ❒ Review the following log files for errors:

  Microsoft Windows Event Viewer (on all servers)

  C:\Program Files\RWD uPerform\Collaboration\log\CollabConsole.txt (on the application server; logs all uPerform activity, including errors)

  C:\Program Files\RWD uPerform\WWW\uPerformWS\ServerErrors.xml (on the application server; logs Glossary activities)

- ❒ Periodically install Microsoft Windows hotfixes and patches. Execute Windows Updates manually on the database server and search server as automatic updates may reboot servers periodically. This practice minimizes the chance of the server rebooting while uPerform is running. (Prior to installing operating system and/or database upgrades, contact RWD Product Support to confirm the upgrade is supported by RWD uPerform.)
- ❒ Check the CPU and memory utilization of the servers.
- ❒ Perform database integrity checks on the database server:

  Check the amount of free space.

  Check the integrity of the backed up databases.

- ❒ Install and operate spyware and virus prevention software on the servers. If it is acceptable with corporate security policies, it is recommended that the virus scanner ignore the entire uPerform install directory.

# Startup and Shutdown Processes for uPerform

In the event of power failures or emergency situations, you will need to shutdown the servers. The following subsections describe the recommended steps for shutting down the servers to avoid data loss and/or corruption.

## *Shutting Down the uPerform Environment*

1. Login and shutdown the application server.
2. Login and shutdown the search server.
3. Login and shutdown the database server.

The database server is always the last server to be shutdown.

## *Starting Up the uPerform Environment*

1. Start the database server.
2. Login to the database server, and ensure the SQL Server Service or Oracle service is started and operational.
3. Start the search server.
4. Login and test the search server operation as described in "Verifying the Autonomy IDOL Server Install" on page 73.
5. After successfully testing both the database and search servers, start the application server.
6. Attempt to login to uPerform via the URL: http://[your server address].
7. Test the search functionality again from the uPerform web browser interface.

# Additional Information and Troubleshooting

## White Papers

RWD-provided white papers are an excellent way to learn more about the uPerform server. These papers are updated frequently and are available on the RWD uPerform knowledgebase at http://www.products.rwd.com. For customers who license RWD uPerform through the RWD-SAP global reseller agreement, the SAP-hosted knowledgebase is available at http://service.sap.com.

Current RWD white papers include:

- ❒ uPerform Big Picture
- ❒ Installing RWD uPerform in a Load Balancing Environment
- ❒ Getting Started with RWD uPerform
- ❒ Moving an RWD uPerform Database
- ❒ uPerform Sample Architecture
- ❒ Creating a Database Maintenance Plan for RWD uPerform
- ❒ uPerform Database: Frequently Asked Questions

## Frequently Asked Questions

Frequently Asked Questions (FAQs) also offer up-to-date troubleshooting solutions for issues you may encounter with the uPerform server. FAQs are available on the RWD uPerform knowledgebase at http://www.products.rwd.com. For customers who license RWD uPerform through the RWD-SAP global reseller agreement, the SAP-hosted knowledgebase is available at http://service.sap.com.

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