ConcourseConnect

Installation, Setup and Upgrade

Thursday, June 4, 2009

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Introduction

Welcome to ConcourseConnect!

ConcourseConnect is a business social software application which enables you to launch social networking sites, corporate intranets and complete web sites.

The installation, configuration, and upgrade of ConcourseConnect is intended to be as simple as possible. However, this document assumes that you have a working knowledge of the required applications. Please read the complete instructions for a successful installation or upgrade.

This information is provided to those that have read and agreed to the ConcourseConnect license agreement.

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Requirements

Download ConcourseConnect

For the latest version and downloads, check the Concursive Wiki:
http://www.concursive.com/show/concourseconnect/wiki/Downloads

Pick your software requirements

ConcourseConnect works on a number of platforms. This means that you can choose what works best for your organization. The Concursive development team uses PostgreSQL, Apache Tomcat 5.5 and Sun Java 5 as the base reference platform. You can also use Apache Tomcat 6 and Sun Java 6.

Operating System
Linux
Mac OSX
Microsoft Windows
Solaris OS

Database Server
PostgreSQL 8.2/8.3

Application Server + Sun Java VM
Apache Tomcat 5.5 + Sun Java 5.0 JRE

Important Notice About Email

The ConcourseConnect software sends email regarding user invitations, user notifications and reports. ***In order for ConcourseConnect to send email, a qualified mail server must be used.*** This mail server must allow the software to send email to internal and external email addresses. After setting up ConcourseConnect, you should create a user account and invite a sample user with an external email address, such as a gmail or yahoo address, for testing.

Important Notice About Integrated Services

The ConcourseConnect software relies on remote application services from Concursive for various functionality. This means that once the ConcourseConnect software is registered for Concursive Services, the application will make requests to Concursive to fulfill the various services. The Open Source release ***does not*** currently include the services registration form and remote services capability.

Pick your hardware requirements

ConcourseConnect is lightweight. Any server you can buy today is generally more than you'll need to get started. However, configure it based on the demands of your site. A single server can be used for the web server, database server, and mail server. However, as the site's popularity grows you may need to expand the hardware or use a load-balanced and clustered configuration (available separately from Concursive).

10s of users
2 GHz (x2)
1 GB
120 GB
RAID

100s of users
2 GHz (x2)
2 GB
160 GB
RAID

1,000s of users
2 GHz (x4)
4 GB
200 GB+
RAID
LOAD BALANCED

1,000,000s of users
2 GHz (x4)
8 GB
500 GB+
RAID
LOAD BALANCED

Suggested steps for a successful Linux Installation

Install Java and Tomcat

1. Download and install the Java JRE 5.0 from http://www.java.com
2. Download and install Tomcat 5.5 stable archive from http://tomcat.apache.org/download-55.cgi
3. Depending on the total memory of your system, typically set Tomcat's memory to half of the server by setting the following environment variable (directly in the startup.sh file):

   ```
   export JAVA_OPTS="-Xms256m -Xmx256m"
   ```

4. Enable software graphics rendering, or else graphics capabilities will fail, by setting the following environment variable (directly in the startup.sh file):

   ```
   export CATALINA_OPTS=-Djava.awt.headless=true
   ```

5. Copy the ConcourseConnect Web Application Archive (connect.war) file into Tomcat's "webapps" directory
6. Setup a service to automatically have Tomcat start and stop during startup and shutdown, according to Tomcat's documentation.

If you are using PostgreSQL then perform the following additional steps:

1. Verify if PostgreSQL is installed with "psql --version"
2. If your installation does not already have PostgreSQL 8, then download and install PostgreSQL 8.3 from http://www.postgresql.org
3. Make sure TCP/IP connections are enabled for localhost in pg_hba.conf
4. Create a "connect" user using the following command, allow this user to create and administrate the database:

   ```
   createuser connect
   ```

5. Create a "connect" database using the following command:

   ```
   createdb -E UNICODE connect
   ```

Now that the necessary software and servers are installed, proceed with setting up ConcourseConnect as follows:

1. Start the Apache Tomcat service
2. Log in to the ConcourseConnect setup process by using a browser and going to "http://127.0.0.1:8080/connect" (assuming the file installed was connect.war and you are connecting to 127.0.0.1)
3. Follow the on-screen directions and provide the database information when prompted

Additional advanced steps to consider:

1. Change Tomcat port to 80 (must either integrate with Apache Web Server or turn off Apache Web server)
2. Setup database and file library backups

Suggested steps for a successful Mac OSX Installation

Install Tomcat

1. Download and install Tomcat 5.5 stable archive from http://tomcat.apache.org/download-55.cgi

2. Depending on the total memory of your system, typically set Tomcat's memory to half of the server by setting the following environment variable (in startup.sh):

   ```
   export JAVA_OPTS="-Xms256m -Xmx256m"
   ```

3. Copy the ConcourseConnect Web Application Archive (connect.war) file into Tomcat's "webapps" directory

4. Enable software graphics rendering, or else graphics capabilities may fail, by setting the following environment variable (directly in the startup.sh file):

   ```
   export CATALINA_OPTS=-Djava.awt.headless=true
   ```

5. Setup a service to automatically have Tomcat start and stop during startup and shutdown

If you are using PostgreSQL then perform the following additional steps:

1. Download the PostgreSQL 8.3 Installer from Enterprise DB at http://www.enterprisedb.com/products/download.do

2. Make sure TCP/IP connections are enabled for localhost in pg_hba.conf

3. Create a "connect" user using "createuser"

4. Create a "connect" database using "createdb -E UNICODE connect"

Now that the necessary software and servers are installed, proceed with setting up ConcourseConnect as follows:

1. Start the Apache Tomcat service

2. Log in to the ConcourseConnect setup process by using a browser and navigating to "http://127.0.0.1:8080/connect" (assuming the file installed was connect.war and you are connecting to 127.0.0.1)

3. Follow the on-screen directions and provide the database information when prompted

Additional advanced steps to consider:

1. Change Tomcat port to 80 (must either integrate with Apache Web Server or turn off Apache Web server)

2. Setup database and file library backups

Suggested steps for a successful Windows Installation

Install Java and Tomcat

1. Download and install the Java JRE 5.0 from http://www.java.com
2. Download and install Tomcat 5.5 stable binary (Windows Service Installer exe) from http://tomcat.apache.org/download-55.cgi ; depending on the total memory of your system, typically set Tomcat's memory to half of the server using Tomcat's configuration editor
3. Using the Windows Services Control Panel, stop the "Apache Tomcat" service
4. Copy the ConcourseConnect Web Application Archive (connect.war) file into Tomcat's "webapps" directory -- usually located in "C:\Program Files\Apache Software\Tomcat \webapps"

If you are using PostgreSQL then perform the following additional steps:

1. Create a Windows user on the system named "postgres" (normal user, non-administrator) and remember the password used
2. Download and install PostgreSQL 8.3 Windows (win32) binary (.exe) from http://www.postgresql.org
3. During the installation, make sure to create a postgres database user named "connect" and remember the password used
4. Using the Application "PgAdmin III," which was installed with PostgreSQL, login to the database server and create a new database called "connect" with UNICODE setting

Now that the necessary software and servers are installed, proceed with setting up ConcourseConnect as follows:

1. Start the Apache Tomcat service
2. Log in to the ConcourseConnect setup process by using a browser and going to "http://127.0.0.1:8080/connect" (assuming the file installed was connect.war and you are connecting to 127.0.0.1)
3. Follow the on-screen directions and provide the database information when prompted

Additional advanced steps to consider:

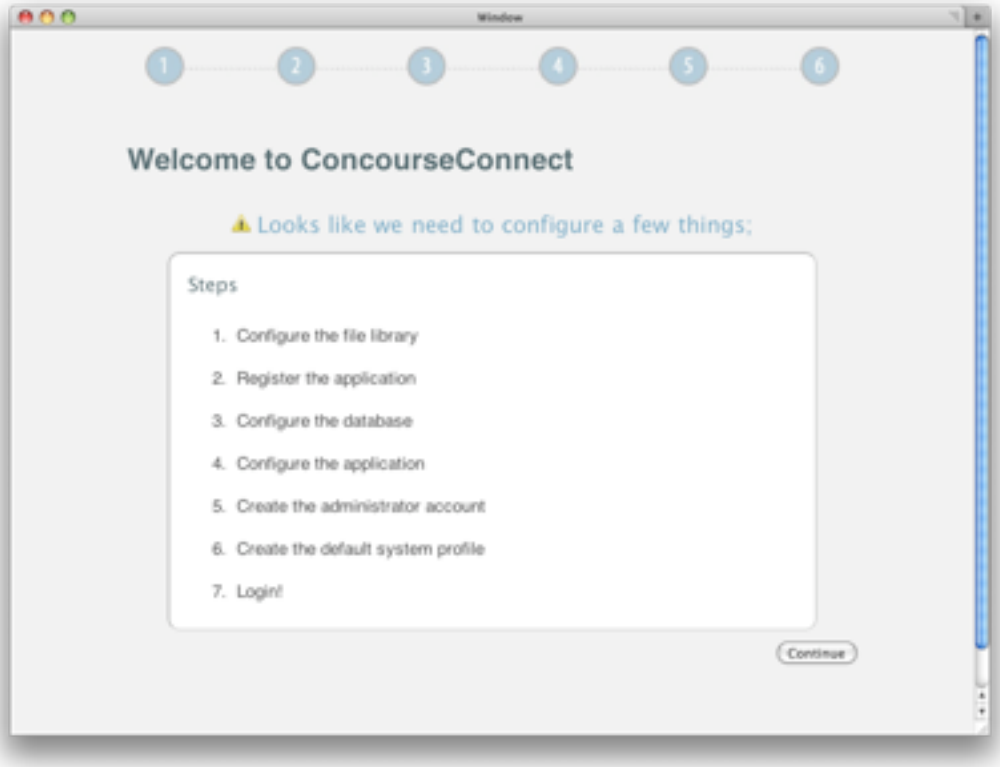
1. Setup backups for the database, file library and connect.war
2. Change Apache Tomcat port to 80 (must either integrate with an existing web server like Apache Web Server or IIS, or turn off the existing web server and just use Apache Tomcat)
3. Obtain and configure the web server for SSL with an SSL certificate
4. Determine and configure the web context that makes sense for your users, for example
    4.1. http://www.example.com/connect
    4.2. http://connect.example.com
    4.3. http://www.example.com

Web Based Setup

Welcome Page

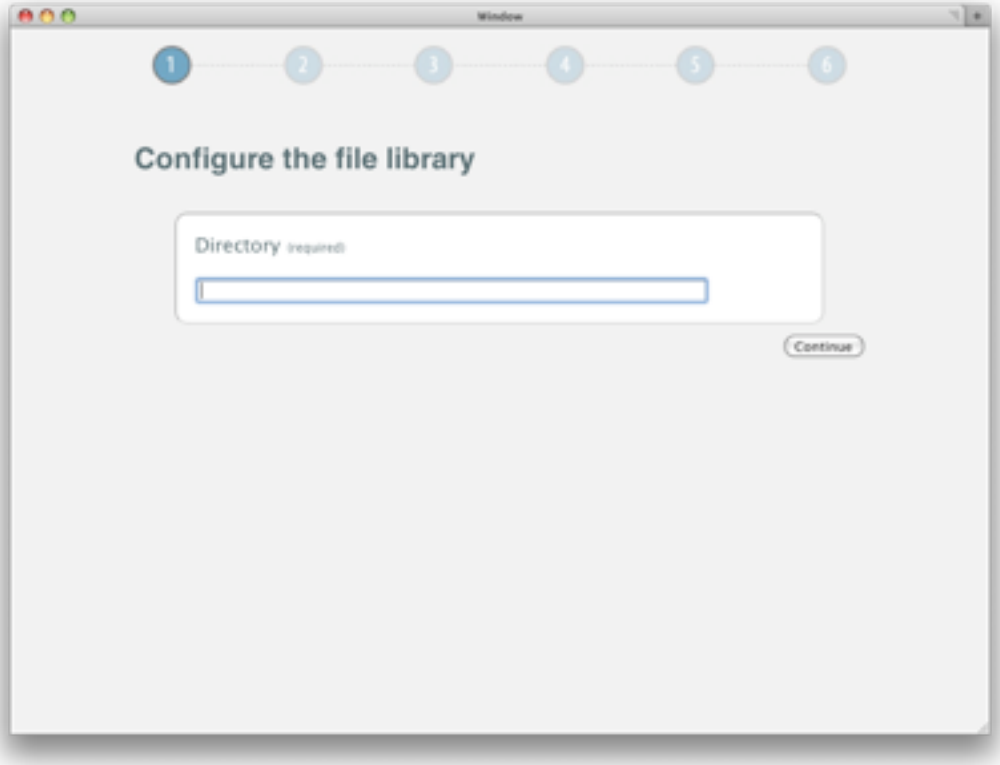
Once ConcourseConnect is installed, you should see the following welcome message in your browser. You're now ready to continue with the web-based portion of the install.

There are six (6) main steps for configuration.



Configure the file library

The application stores configuration information, user documents, and application components in the application's "file library." The file library is simply a path to where those files should be stored. Make sure the application can write to that path, and that there is plenty of free disk space.

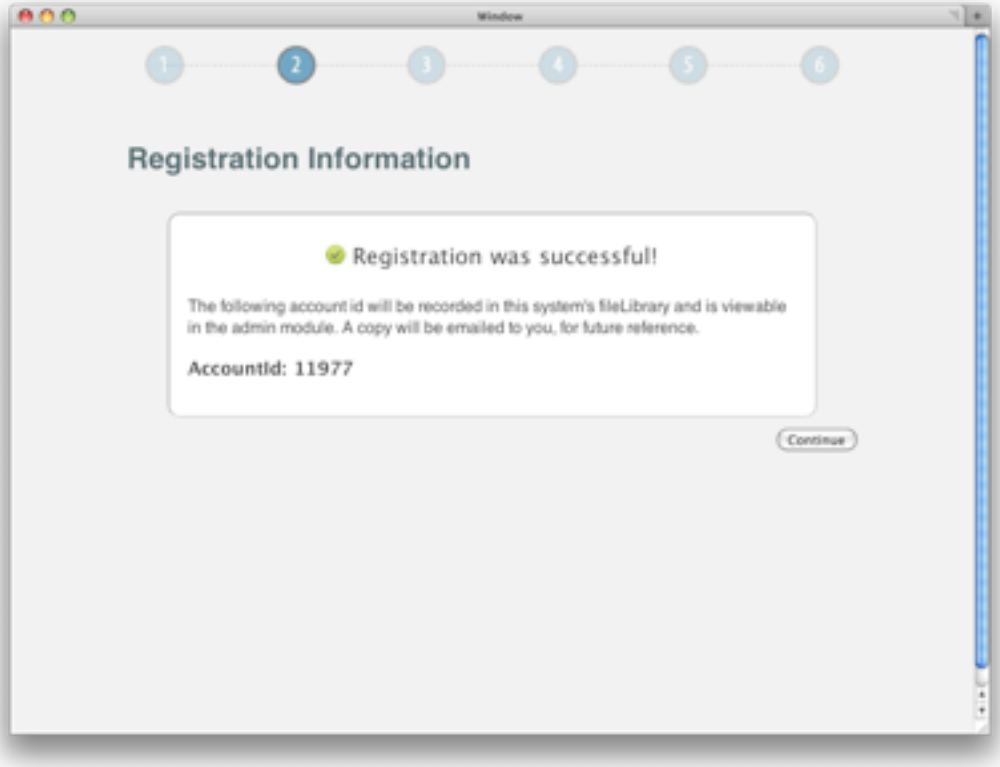


Registration Information

ConcourseConnect uses web-based services for added functionality. Specifically, Web Services for Remote Portlets (WSRP) is used for standardizing interactions between ConcourseConnect and the Concursive Services server. SSL is used for the communication. As part of the WSRP specification, each ConcourseConnect has a unique identity for obtaining entitled services. The services can be remotely updated without each ConcourseConnect being updated individually. Additionally, custom services can be deployed in which only a single instance is entitled to use.

Complete the form and choose to continue to enable the services.

The Open Source release does not include the services registration page.

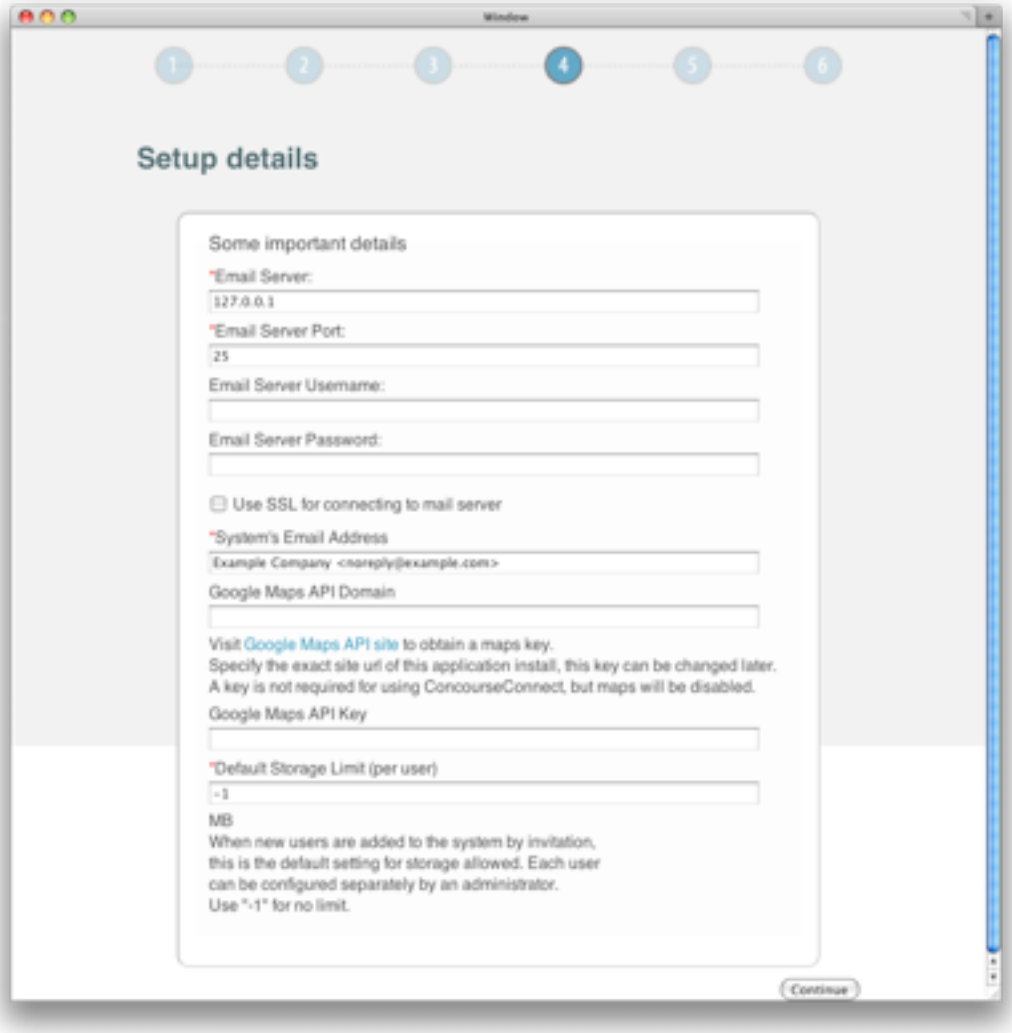


Database

Specify the database connection. The database connection will be tested first. If a connection is successful, then the database schema will be installed, if it does not already exist.

Server Details

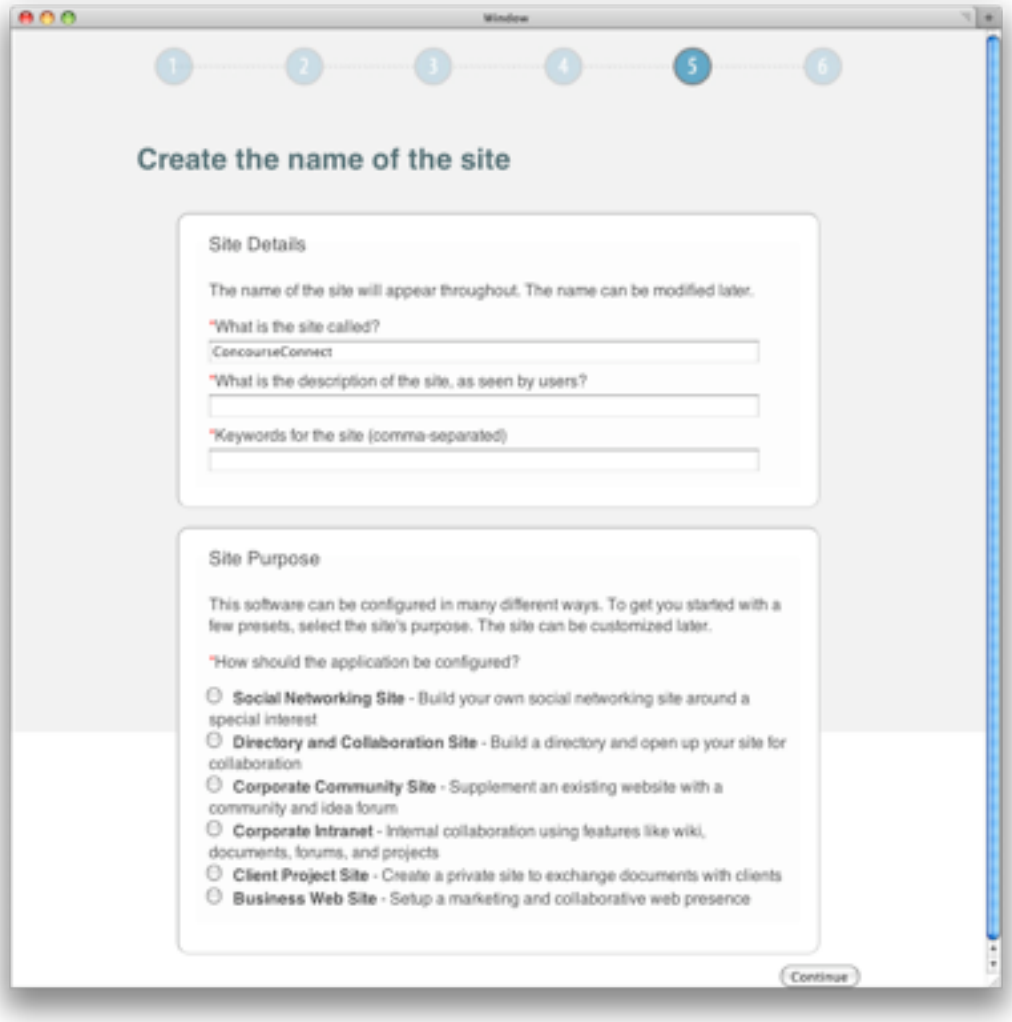
The application settings are set for email and other behavior. Complete the requested information.



Site Settings

Information about the site is configured. Each site has a name, description, and keywords, as seen by users and search engines.

Additionally, each site has a purpose. Choose the purpose of the site so that default tabs are configured. The tabs and related information can be modified later using the Administrative Configuration module after the system has been setup.



Create an Administrator Account

The administrator is responsible for managing the site. The administrator can appoint other users as administrators later, if necessary.

Administrators are notified about key happenings in the system. For example, when a user completes the “Contact Us” form in the web site, the administrators are notified.

Setup is Complete

Home Page

Once installation is complete, you should see the default site home page. Depending on the purpose of the site, you may see different tabs.

Followup Configuration

The site is not quite ready for users just yet. Now that the installation part is complete, please consult the user documentation for customizing and launching your site.

The latest user documentation is available in the Concursive wiki:
http://www.concursive.com/show/concourseconnect/wiki/User+Documentation

Customizing your site includes...

Using the Admin Module

- Configure the site name, logo, and theme
- Configure the enabled tab categories that will appear across the application
- Configure the related category defaults

Configuring the Main Profile

- Update the site's wiki by navigating to the "About Us" link a the top of the site's header
- Write content for each of the tab's landing pages, using the wiki; choose to view the Wiki Index
- Write content for the home page, using the wiki
- ...and more

Upgrade Procedure

Upgrading from a previous version of ConcourseConnect has been designed to be as simple as possible. All of your previous ConcourseConnect configuration information is saved in the file library, which, by default, is not in the same path as the webapp, preserving your information.

Please review all upgrade steps to ensure that the upgrade goes as planned. The upgrade process can be completed in under 10 minutes if you are prepared and everything goes well.

IMPORTANT: Make sure to backup the ConcourseConnect database and file library before continuing with the upgrade. The upgrade process will make irreversible changes to your database, unless you have a backup.

1. Shutdown the Apache Tomcat web application server
2. Backup the "connect" database -- you can restore this database if a problem occurs during upgrade
3. Backup the file library, specified during application installation -- if a problem occurs then the "build.properties" file will need to be restored
4. Backup the existing Apache Tomcat webapps/connect.war file -- you can restore this WAR if a problem occurs during upgrade
5. Delete the existing Apache Tomcat webapps/connect directory -- this is important to avoid any problems with Tomcat; delete the existing Apache Tomcat work/Catalina/localhost/connect directory
6. Copy the connect.war file into Tomcat's webapps folder, overwriting the existing connect.war file -- replacing the existing file is important
7. Startup the Apache Tomcat web application server
8. Login to ConcourseConnect to perform additional upgrade steps as instructed by the application

Once the ConcourseConnect application has started, and you are able to connect with a web browser, you will be prompted with a page indicating that the application has detected an out-of-date database. Follow the on-screen instructions to finish the upgrade.

NOTE: If you are not presented with an upgrade screen, it's possible that your browser has cached the login screen. Try refreshing your browser or emptying its cache.

NOTE: Until an administrator logs into ConcourseConnect and confirms the upgrade, users will not be able to login.

NOTE: If any problems occur during the upgrade, a detailed report is generated in the Apache Tomcat log file which can be used to further identify the problem. The log file is located in Tomcat's logs directory, usually as catalina.out or stdout.txt.