



ConcourseConnect

Installation, Setup and Upgrade

Revised November 19, 2014



Introduction	3
Requirements	4
Suggested steps for a successful Linux Installation	6
Web Based Setup	11
Followup Configuration	20
Upgrade Procedure	24

Introduction

Welcome to ConcourseConnect!

ConcourseConnect is a business social software application which enables you to launch social networking sites, collaborative 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.

Legal Notice

ConcourseConnect is Copyright © 2007-2014 by Conursive Corporation and is distributed under different licenses depending on the version you have acquired. Please consult your license agreement for specifics.

IN NO EVENT SHALL CONCURSIVE CORPORATION BE LIABLE TO ANY PARTY FOR DIRECT, INDIRECT, SPECIAL, INCIDENTAL, OR CONSEQUENTIAL DAMAGES, INCLUDING LOST PROFITS, ARISING OUT OF THE USE OF THIS SOFTWARE AND ITS DOCUMENTATION, EVEN IF CONCURSIVE CORPORATION HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGE. CONCURSIVE CORPORATION SPECIFICALLY DISCLAIMS ANY WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE. THE SOFTWARE PROVIDED HEREUNDER IS ON AN "AS-IS" BASIS.

Requirements

Download ConcourseConnect

For the latest version and downloads, check your assigned Concourse Project.
<http://www.concourse.com>.

Pick your software requirements

The Concourse development team uses PostgreSQL 9.3, Apache Tomcat 7 and Oracle Java JDK 7 as the base reference platform. We also use Linux and Mac OS X, but rarely Windows.

Operating System
Linux
Mac OS X
Microsoft Windows

Database Server
PostgreSQL 9.3

Application Server + Sun Java VM
Apache Tomcat 7.0 + Oracle Java JDK 7

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. Configuring a network Reverse DNS with a valid SPF record will improve the chances of email going to a user's inbox.

Important Notice About Integrated Services

The ConcourseConnect software relies on remote application services from Concourse or other 3rd party services for various functionality. This means that once the ConcourseConnect software is registered, the application may make requests to Concourse or 3rd party services to fulfill the various services – these include geocoding, maps and meta-data for embedded media like videos.

Pick your hardware/cloud requirements

ConcourseConnect is generally lightweight. Any server you can buy today or cloud slice you configure 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. As the site's popularity grows you may need to expand the hardware or use a load-balanced and clustered configuration (available separately from Concourse).

A minimum of 1 GB is required to handle the application and background image processing. Enabling document processing requires OpenOffice and additional memory.

10s of users	100s of users	1,000s of users	1,000,000s of users
2 GHz (x2)	2 GHz (x2)	2 GHz (x4)	2 GHz (x8)
1 GB	2 GB	4 GB	8 GB
120 GB	160 GB	200 GB+	500 GB+
RAID	RAID	RAID	RAID
		LOAD BALANCED	LOAD BALANCED

Connect requires 640 MB (due to in-memory image scaling)

Postgres database requires 256 MB

Open Office conversion requires 512 MB

CPU: at least 2 units for multi-threaded operation

I/O: database access

Memory: at least 1 GB for application, cache, image processing; at least 2 GB for optional document processing

Disk: user content, documents, index, configuration

Suggested steps for a successful Linux Installation

Requirements

- Configure the network settings
- Create system users
- Turn off root SSH
- Setup the firewall for web ports 80/443, limit SSH
- Install Oracle Java
- Install Apache Tomcat (configure memory settings; add to system startup)
- Setup Logrotate
- Install PostgreSQL 9.3 (configure access and tune database memory settings)
- Install Postfix and verify settings (defaults are normally ok)
- Put Concurrency items into place (/home/fileLibrary; /home/webapps; backup scripts)
- Setup remote database and file backups in crontab
- Install Apache OpenOffice
- Install SWFTools

Install Java and Tomcat

1. Download and install the Java JDK
<http://www.oracle.com/technetwork/java/javase/downloads/index.html>
2. Download and install Tomcat stable
<http://tomcat.apache.org>
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):

```
JAVA_OPTS="-Xms256m -Xmx384m -XX:PermSize=128m -XX:MaxPermSize=256m  
-XX:+UseParNewGC"
```

```
JAVA_OPTS="-Xms768m -Xmx2048m -XX:PermSize=512m -XX:MaxPermSize=768m  
-XX:+UseParNewGC"
```

```
JAVA_OPTS="-Xms4096m -Xmx4096m -XX:PermSize=256m -XX:MaxPermSize=1024m  
-XX:+UseParNewGC"
```

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

```
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.

7. Make sure the operating system doesn't have OpenJDK installed

```
yum remove java-*-openjdk*
```

Example Tomcat server.xml file

```
<Service...>
```

```
  <Connector port="80" protocol="HTTP/1.1"
```

```
    connectionTimeout="20000"
```

```
    redirectPort="8443" />
```

```
  <Connector address="192.0.0.0" port="443" maxHttpHeaderSize="8192"
```

```
    maxThreads="75"
```

```
    enableLookups="false" disableUploadTimeout="true"
```

```
    acceptCount="100" scheme="https" secure="true"
```

```
  SSLEnabled="true"
```

```
    clientAuth="false" sslProtocol="TLS"
```

```
    keystoreFile="/home/tomcat/example/keystore.jks"
```

```
    keystorePass="keystore pass"
```

```
    keyAlias="tomcat" />
```

```
  <Engine name="Catalina" defaultHost="localhost">
```

```

    <Realm.../>

    <Valve className="org.apache.catalina.valves.AccessLogValve"
        directory="logs" prefix="access_log." suffix=".txt"
        pattern="%h %l %v %t &quot;%r&quot; %s %b"
        resolveHosts="false"/>

    <Host name="localhost" appBase="webapps"
        unpackWARs="true" autoDeploy="true">

    </Host>

<!-- Assumes the connect.war is called ROOT.war in the /connect path -->

    <Host name="example.com" appBase="/home/tomcat/example/connect"
        unpackWARs="true" autoDeploy="false">

        <Alias>www.example.com</Alias>

        <Alias>example.dev.concursive.com</Alias>

    </Host>

</Engine>

</Service>

```

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, then download and install PostgreSQL <http://www.postgresql.org>
3. Make sure TCP/IP connections are enabled for localhost in pg_hba.conf and setup a trust if necessary
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 (see Web Based Setup section); once fully installed, restart Tomcat to make sure the installation still starts up as expected

Additional advanced steps to consider before and after installation:

1. Make sure Tomcat automatically starts up when the server starts up (try restarting the server to verify)
2. Determine and configure the web context that makes sense for your users, for example:

```
http://www.example.com/connect  
http://connect.example.com  
http://www.example.com
```

3. Change the Apache Tomcat Web Server port to 80 (must either integrate with Apache Web Server or make sure any separate Apache Web server is turned off and not already using port 80)
4. Configure Tomcat's logging format
5. Install an SSL certificate
6. Install and configure logrotate

```
# yum install crontab logrotate  
# logrotate --force /etc/logrotate.d/tomcat  
/usr/java/tomcat/logs/catalina-daemon.out {  
    copytruncate  
    missingok  
    compress  
    notifempty  
    daily  
    rotate 7  
    create 0600 root root  
}
```

7. Install and configure SWFTools, PDF2PNG, OpenOffice 4.0; Connect will manage starting and stopping OpenOffice in server mode

```
yum install -y ghostscript ImageMagick
```

```
yum install -y gcc* make automake zlib-devel libjpeg-devel giflib-devel  
freetype-devel
```

```
wget http://www.swftools.org/swftools-0.9.1.tar.gz && tar xzf  
swftools-0.9.1.tar.gz && cd swftools-0.9.1 && ./configure && make &&  
make install
```

```
yum remove openoffice.org* libreoffice.org*
```

```
wget http://sourceforge.net/projects/openofficeorg.mirror/files/4.1.0/  
binaries/en-US/Apache_OpenOffice_4.1.0_Linux_x86-64_install-rpm_en-  
US.tar.gz
```

```
tar xzf Apache_OpenOffice_4.1.0_Linux_x86-64_install-rpm_en-US.tar.gz
```

```
cd en-US/RPMS/
```

```
rpm -Uvh *.rpm
```

```
ln -s /opt/openoffice4 /opt/openoffice.org3
```

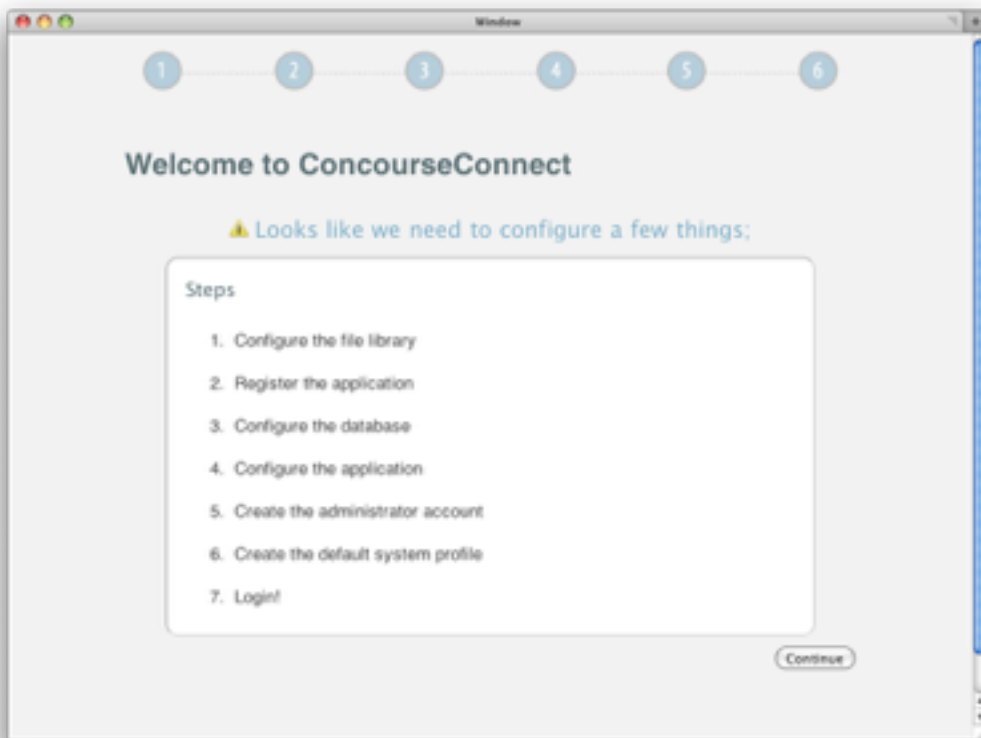
8. Perform database and file library backups on a schedule.
9. Configure ConcourseConnect's build.properties file in the fileLibrary path

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.

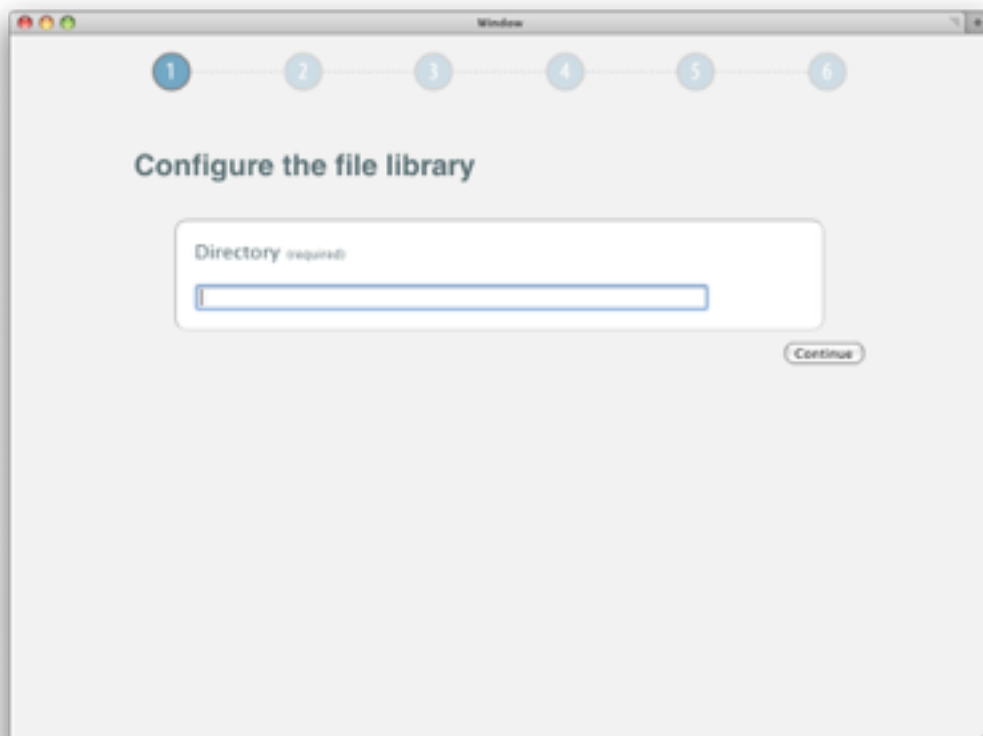
There are six (6) main steps for configuration.



Configure the file library for new or existing installations

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. An example path is: `/home/fileLibrary/connect`

NOTE: If you are restoring Connect from a backup or another server, then specify the path of an existing fileLibrary and Connect will detect it and offer to use it. Check the fileLibrary’s `build.properties` file to make sure all properties are correct for this system before continuing.

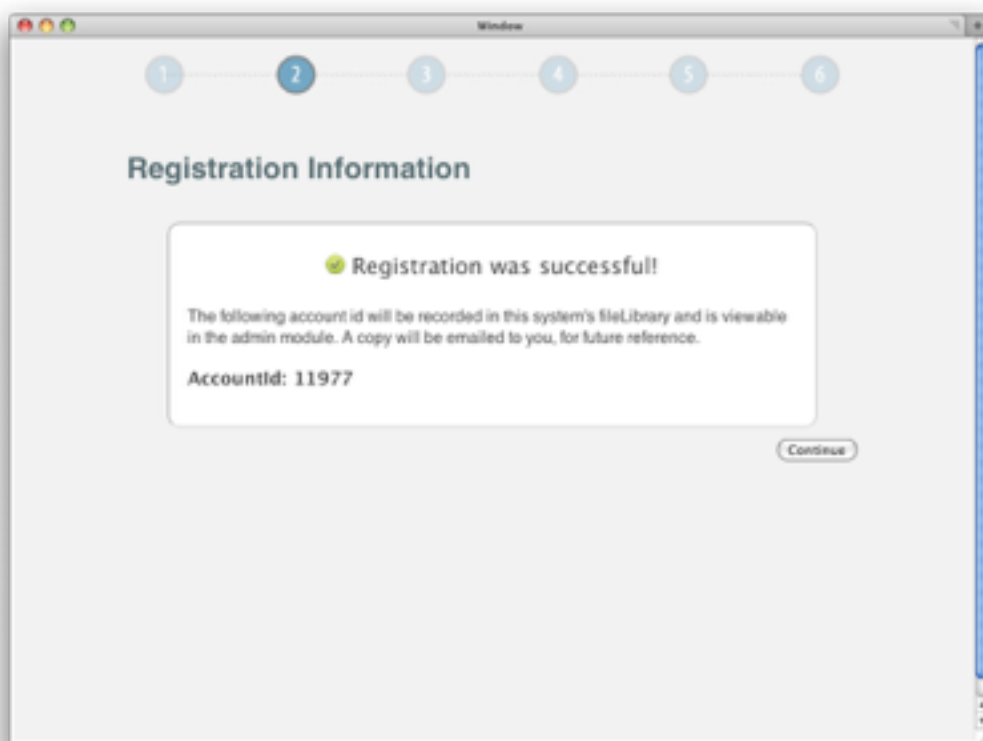


Registration Information

ConcourseConnect uses web-based services for added functionality. Specifically, Web Services for Remote Portlets (WSRP) is used for standardizing interactions between ConcourseConnect and the Concourse 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.

The image shows a window titled "Configure the database connection". At the top, there is a progress indicator with six steps, where step 3 is currently active. The main content area is titled "Configure the database connection" and contains a "Database Details" section. This section includes the following fields:

- *Database:** A dropdown menu showing "PostgreSQL 8.1/8.2/8.1/8.0".
- *Address:** A text input field containing "127.0.0.1".
- *Port:** A text input field containing "5432".
- *Database:** A text input field containing "connect".
- *User Name:** A text input field containing "postgres".
- Password:** An empty text input field.

A "Continue" button is located at the bottom right of the dialog box.

Server Details

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

The screenshot shows a 'Setup details' window with a progress indicator at the top showing steps 1 through 6, with step 4 highlighted. The window contains the following fields and options:

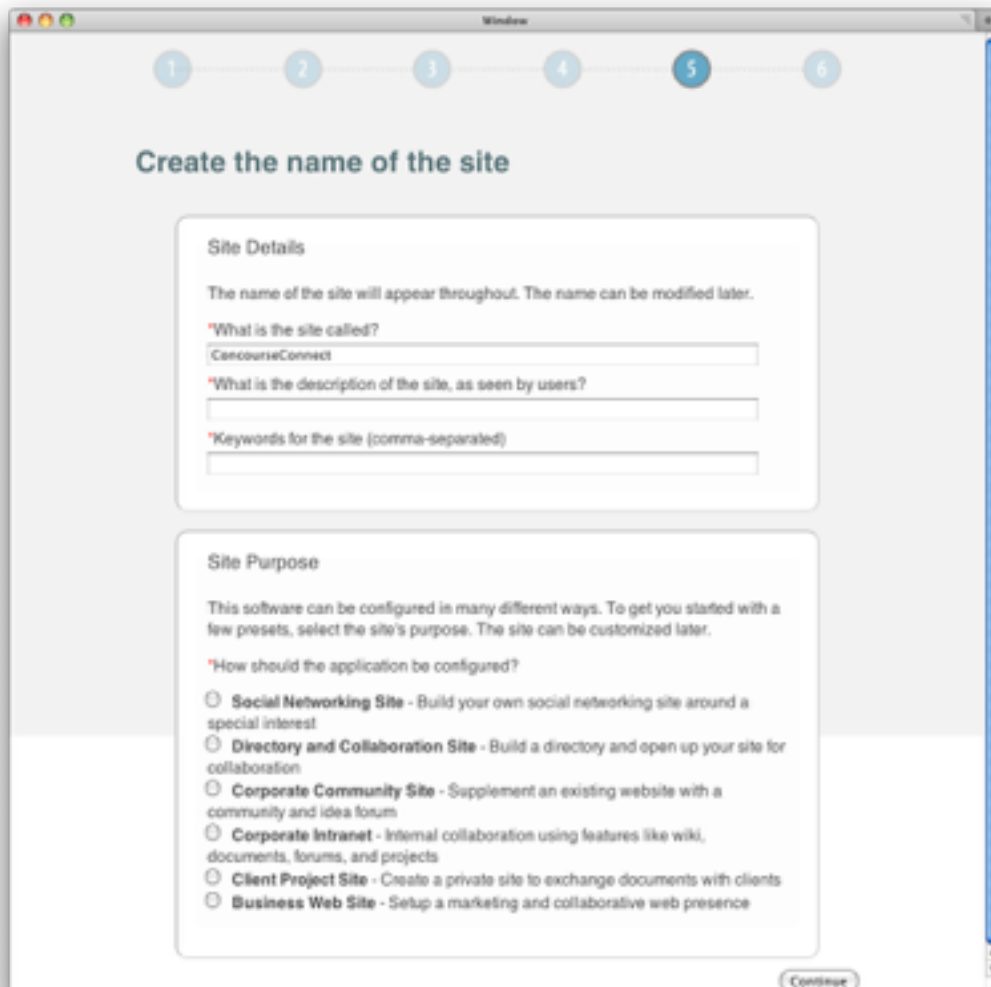
- Some important details**
- *Email Server:** 127.0.0.1
- *Email Server Port:** 25
- Email Server Username:** (empty field)
- Email Server Password:** (empty field)
- Use SSL for connecting to mail server
- *System's Email Address:** Example Company <noreply@example.com>
- Google Maps API Domain:** (empty field)
- Visit [Google Maps API site](#) to obtain a maps key. Specify the exact site url of this application install, this key can be changed later. A key is not required for using ConcourseConnect, but maps will be disabled.
- Google Maps API Key:** (empty field)
- *Default Storage Limit (per user):** -1
- MB**
- When new users are added to the system by invitation, this is the default setting for storage allowed. Each user can be configured separately by an administrator. Use "-1" for no limit.

A 'Continue' button is located at the bottom right of the form area.

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.



The screenshot shows a web-based configuration window titled "Create the name of the site". At the top, there is a progress indicator with six numbered steps (1-6), where step 5 is highlighted in blue. The main content is divided into two sections: "Site Details" and "Site Purpose".

Site Details

The name of the site will appear throughout. The name can be modified later.

*What is the site called?

*What is the description of the site, as seen by users?

*Keywords for the site (comma-separated)

Site Purpose

This software can be configured in many different ways. To get you started with a few presets, select the site's purpose. The site can be customized later.

*How should the application be configured?

- Social Networking Site** - Build your own social networking site around a special interest
- Directory and Collaboration Site** - Build a directory and open up your site for collaboration
- Corporate Community Site** - Supplement an existing website with a community and idea forum
- Corporate Intranet** - Internal collaboration using features like wiki, documents, forums, and projects
- Client Project Site** - Create a private site to exchange documents with clients
- Business Web Site** - Setup a marketing and collaborative web presence

At the bottom right of the form, there is a "Continue" button.

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. There are additional details that can be configured in the site's fileLibrary/build.properties file. Some important properties:

```
# When links are sent in email, what should the URL info be?
#URL.SCHEME=http
#URL.DOMAIN_NAME=www.example.com
#URL.PORT=8080
#URL.CONTEXT=/connect

# Default language (each user can have a different language selected)
# Implemented choices include: en_US, de_DE, es_ES, en_GP, en_AU, en_ZA
SYSTEM.LANGUAGE=en_US

# Default Timezone... like Europe/London, Australia/Sydney, Africa/
Johannesburg, Africa/Gaborone
#SYSTEM.TIMEZONE=

# Default Currency... like USD, GBP, EUR, AUD, ZAR
#SYSTEM.CURRENCY=

# Default Country... like UNITED STATES, UNITED KINGDOM, AUSTRALIA, SOUTH
AFRICA
#SYSTEM.COUNTRY=

# Show holidays on the calendar, based on SYSTEM.LANGUAGE
HOLIDAYS=TRUE

#SYSTEM.LANGUAGE=en_AU
#SYSTEM.TIMEZONE=Australia/Tasmania
#SYSTEM.CURRENCY=AUD
#SYSTEM.COUNTRY=AUSTRALIA
#HOLIDAYS=TRUE

#SYSTEM.LANGUAGE=en_ZA
#SYSTEM.TIMEZONE=Africa/Johannesburg
#SYSTEM.CURRENCY=ZAR
#SYSTEM.COUNTRY=SOUTH AFRICA
#HOLIDAYS=TRUE

# Web site characteristics
#SHOW_LOGIN_MENU=true
#SHOW_SITE_MENU=true
#SHOW_SEARCH=true
#SHOW_REGISTER=true
#SHOW_NAVIGATION=true
#SHOW_MY_PAGE_TAB=true
#SHOW_CONTENT_FOOTER=true
#SHOW_CONTACT_US_FOOTER=true
#SHOW_ABOUT_US=true
#SITE_TAG_LINE=Powered by Concursive
```

```

# Can users register at the site?
REGISTER=true
# Must an admin approve the registration?
REQUIRES_AUTHORIZATION=false
# Are users shown the license T&C when registering?
LICENSE=true
# Can users invite other users?
INVITE=true
# Is the site's content completely locked down?
SENSITIVE_INFORMATION=false
# Can any user start a project?
START_PROJECTS=true
# How many MB can each user store in the documents module?
ACCOUNT.SIZE=-1
# Show the geolocation field when performing searches?
USE_LOCATIONS=true
# Enable the site to use multiple landing pages based on languages enabled?
USE_LANGUAGES=false
# What role will a user have by default on their own profile?
DEFAULT_USER_PROFILE_ROLE=Manager
# Which user privacy permission is the default? (choose one)
#DEFAULT_USER_PRIVACY_PERMISSIONS=friends, users, everyone
# Which user profile tabs are the defaults for users? What should they be
called?
#DEFAULT_USER_PROFILE_TABS=Profile, Photos, Videos, Blog, Wiki, Classifieds,
Documents, Lists, Badges, Friends, Messages, Reviews

# Settings for the timesheet module
#PROJECTS.START_DAY=sunday, monday
#PROJECTS.MILEAGE_RATE=0.565

# Sharing links to facebook and twitter
#SHARING.ENABLED=true
#SHARING.LINKS=facebook

# Connection Pool Settings, optimize based on the underlying server settings
CONNECTION_POOL.DEBUG=true
CONNECTION_POOL.TEST_CONNECTIONS=false
CONNECTION_POOL.ALLOW_SHRINKING=true
CONNECTION_POOL.MAX_CONNECTIONS=10
CONNECTION_POOL.MAX_CONNECTIONS.APPS=5
CONNECTION_POOL.MAX_CONNECTIONS.WORKFLOW=3
CONNECTION_POOL.MAX_CONNECTIONS.CACHE=3
CONNECTION_POOL.MAX_CONNECTIONS.RSS=2
CONNECTION_POOL.MAX_CONNECTIONS.API=2
CONNECTION_POOL.MAX_CONNECTIONS.USER_API=5
CONNECTION_POOL.MAX_CONNECTIONS.DECISION_MANAGER=5
CONNECTION_POOL.MAX_IDLE_TIME.SECONDS=60
CONNECTION_POOL.MAX_DEAD_TIME.SECONDS=300

# Facebook integration for logins
#FACEBOOK.ENABLED=true
#FACEBOOK.APP_ID=

```

```
#FACEBOOK.APP_SECRET=

# Google Maps API to show maps in the website
#GOOGLE_MAPS.DOMAIN=www.example.com
#GOOGLE_MAPS.KEY=ABQIAAAafsfi-fG5t8ulbbAwLsplJRTBfUk9TZrBRaIteybtn

# Google Analytics API
#GOOGLE_ANALYTICS.VERIFY=
#GOOGLE_ANALYTICS.ID=

# Kaltura for video services
#KALTURA.SCHEME=http
#KALTURA.DOMAIN=www.example.com
#KALTURA.PORT=80
#KALTURA.PARTNER_ID=
#KALTURA.ADMIN_SECRET=
#KALTURA.USER_SECRET=

# Use MapQuest for Geocoding
#MAP_QUEST.KEY=

# OpenOffice Document Conversion
#OPENOFFICE.ENABLED=true
#OPENOFFICE.PORT=2002

# OpenMeetings API
#OPENMEETINGS.URL=http://localhost:5080/openmeetings
#OPENMEETINGS.USERNAME=admin
#OPENMEETINGS.PASSWORD=password
#OPENMEETINGS.VERSION=1.3

# Ustream API
#USTREAM.KEY=

# Contact Us Form
#CONTACT_US.CAPTCHA_REQUIRED=true
#CONTACT_US.EMAIL_TO=user@example.com
#CONTACT_US.EMAIL_CC=user@example.com

# New User Registrations
####ADMIN.USER_REGISTERED.EMAIL_TO=user@example.com
####ADMIN.USER_REGISTERED.EMAIL_CC=user@example.com

## Notification Settings
#NOTIFICATIONS.NEW_LISTINGS=true
####ADMIN.NEW_LISTINGS.EMAIL_TO=user@example.com
####ADMIN.NEW_LISTINGS.EMAIL_CC=user@example.com

# Monitors
#MONITOR.EMAIL_TO=

# Put an http-digest authentication password in front of the website
#SITE.AUTHENTICATION=true
#SITE.AUTHENTICATION.USERNAME=
```

```
#SITE.AUTHENTICATION.PASSWORD=
```

```
# Force the application into HTTPS scheme when users are logged in  
#SSL=false
```

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 at 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. Your Theme and CSS is also backed up to the fileLibrary.

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 and review the catalina log file for upgrade details
8. Login to ConcourseConnect to verify that the application is available and the upgrade worked

NOTE: Once the ConcourseConnect application has started, and you are able to connect with a web browser, you may be prompted with a page indicating that the application is being upgraded. This means that an error occurred during the upgrade and you must review the logs to see why it failed. Users will not be able to login until the upgrade fail is resolved.

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.