HP IDOL Site Admin

Software Version: 10.9

Installation Guide

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Contents

Chapter 1: Introduction

IDOL Site Admin is an administration interface that provides a single point of access for monitoring and managing multiple IDOL servers.

For more information, refer to the *IDOL Site Admin User Guide*.

Chapter 2: Set Up IDOL Site Admin

This section describes how to install and access IDOL Site Admin.

Upgrade IDOL Site Admin

If you previously installed the 10.8 version of IDOL Site Admin, use the following procedure to upgrade to the 10.9 version.

To upgrade IDOL Site Admin

1. Stop Tomcat.

2. Back up your IDOL Site Admin 10.8 configuration file and PostgreSQL database. See "Back Up IDOL Site Admin Configuration File" on page 19 and "Back Up PostgreSQL Database" on page 19 for more details.

3. Delete the IDOLSITEADMIN_CONFIG environment variable.

4. Set up the siteadmin home directory, and set the ownership of the directory to be the Tomcat user (see "IDOL Site Admin Home Directory" on page 9 for more details).

5. Configure the Java system property as described in "Configure Tomcat" on page 10.

6. Replace the siteadmin.war file in the Tomcat webapps directory with the new 10.9 siteadmin.war.

7. Start Tomcat.

> **Note:** The startup process might take longer than usual, because the database schema will be upgraded.

8. Log on to IDOL Site Admin with your existing user credentials.

Prerequisites

IDOL Site Admin supports the following operating systems and third party software.

- Ubuntu Linux 12.04 LTS (Precise Pangolin)

- Windows Server 2008 R2

- Java 1.7

- Apache Tomcat 7

> **Note:** IDOL Site Admin does not recommend using the third party software beyond the End of Life dates that have been announced as follows:
>
> - Ubuntu 12.04 LTS: April 2017
>
> - PostgreSQL 9.1: September 2016
>
> - Java 1.7: March 2015

External Requirements

Before you install IDOL Site Admin, you must install and configure the following components and software, either on the same server on which you intend to install IDOL Site Admin, or on a separate server.

IDOL Components

- IDOL Community 10.9

- IDOL Agentstore 10.9

- IDOL Coordinator 10.9

- IDOL Controller 10.9

Autonomy recommends that you install a separate instance of IDOL Community and IDOL Agentstore specifically for use with IDOL Site Admin, and that you configure the Community data DRE to point at your Agentstore.

Third Party Software

- PostgreSQL 9.1

- (Optional) SMTP Server

> **Note:** IDOL Site Admin requires TCP-only network access to the Community and Coordinator IDOL components, and to PostgreSQL and SMTP Server. IDOL Site Admin does **not** require network access to Agentstore 10.9 or any Controller 10.9 components.

IDOL Site Admin Home Directory

You must define a new directory to use as the IDOL Site Admin home directory. This directory contains the IDOL Site Admin configuration file (`config.json`), and a `logs` subfolder that contains the IDOL Site Admin log files. The Tomcat user must have read and write access to the home directory.

Autonomy recommends that you set the home directory as follows:

- Linux: `/opt/siteadmin`

- Windows: `C:\autonomy\siteadmin`

The location of the home directory is required during the Tomcat configuration process; see "Configure Tomcat" on the next page for more information.

Install and Configure PostgreSQL

To install PostgreSQL, go to http://www.postgresql.org/download/ and follow the instructions to download and install the software in the appropriate format for your system.

After you have installed PostgreSQL, you must carry out the following configuration changes.

- Create a PostgreSQL user for IDOL Site Admin to use when it connects to the database. For more information on how to create a new PostgreSQL user account, refer to the PostgreSQL `createuser` documentation.

> **Note:** You must also create an associated database for that user.

- In the `pg_hba.conf` file, configure PostgreSQL to accept connections from the IDOL Site Admin host. For more information about client authentication, refer to the PostgreSQL `pg_hba.conf` file documentation.

Configure Tomcat

After you have installed Tomcat, you must carry out the following configuration changes.

- Delete the contents of the Tomcat `webapps` directory to remove the default Tomcat 7 web applications.

> **Caution:** Do **not** carry out this change if you are using your Tomcat installation for other web applications.

- In the `/etc/default/tomcat7` file (Ubuntu installations), configure the Tomcat `JAVA_OPTS` variable as follows to allow more memory allocation and Permanent Generation garbage collection, and set the location of the IDOL Site Admin home directory:

  ```
  JAVA_OPTS="-Djava.awt.headless=true -Xmx1536m -XX:+UseConcMarkSweepGC" –
  Dhp.idolsiteadmin.home=<user_specified_directory>"
  ```

  where *<user_specified_directory>* is the location on your system of the directory that you want to use as the IDOL Site Admin home directory.

> **Note:** The number passed to `-Xmx` must not exceed the amount of RAM available on your host.

To make the change for Windows installations, use the following procedure.

To configure the JAVA_OPTS variable (Windows installations)

1. From the **Start** menu, choose **Monitor Tomcat**.

   The Apache Tomcat 7.0 Tomcat7 Properties dialog box opens.

2. Click the **Java** tab.

3. Add `-Djava.awt.headless=true` to the Java Options list.

4. Add `–Dhp.idolsiteadmin.home=<user_specified_directory>` to the Java Options list, where *<user_specified_directory>* is the location on your system of the directory that you want to use as the IDOL Site Admin home directory.

5. In the **Maximum memory pool** field, enter `1536`.

> **Note:** This assumes that there is at least 1.5 GB of memory available on your machine.

6. Click **Apply**, then click **OK** to close the dialog box.

Install IDOL Site Admin

Use the following procedure to install IDOL Site Admin.

To install IDOL Site Admin

1. Download the IDOL Site Admin web application archive file.

2. Move the .war file to your Tomcat webapps directory, then start Tomcat to deploy the file.

3. Open your Web browser and go to `http://ServerName:Port/siteadmin`, where *ServerName* is the host name or IP address of the IDOL Site Admin host, and *Port* is the number of the port that Tomcat 7 is configured to listen on for HTTP requests. By default, the port number is `8080`.

   A logon screen opens.

4. Go to the IDOL Site Admin home directory as specified in the `hp.idolsiteadmin.home` Java system property, and open the IDOL Site Admin configuration file (`config.json`) in a text editor. See "IDOL Site Admin Home Directory" on page 9 and "Configure Tomcat" on the previous page for more information.

5. Use the default user name and password in the `login` section of the configuration file to log on to the Web page that you opened in Step 4. For example:

   ```
   "login": {
       "defaultLogin": {
         "username": "the_username_you_want",
         "password": "the_password_to_enter"
       }
   }
   ```

   > **Note:** IDOL Site Admin prepopulates the login page with the default user name when you log on for the first time.

   The Settings screen opens.

6. On the Settings screen, enter the connection details for the external requirements that are listed in "Prerequisites" on page 8. Click **Test Connection** for each section to check that IDOL Site Admin

can connect to each server.

> **Note:** You can choose to connect to your Community component using `http` or `https`. If you choose `https`, you must configure Community to use SSL.

7. After IDOL Site Admin connects to the Community component, you can no longer use the default administrator user name. You must click **Users** in the Settings menu to go to the User Management page and create user details in the Community component. See "User Roles" on page 15 for more information.

> **Note:** If you do not take this step you must manually create users in the IDOL Community 10.9 back end. Refer to the *IDOL Server Administration Guide* for more information.

8. Click **Save Changes**.

9. Restart your Tomcat server (see "Start and Stop IDOL Site Admin" on the next page for more information).

10. In your Web browser, go to `http://ServerName:Port/siteadmin` and log on with the user details that you created in Step 6.

    IDOL Site Admin is now installed and ready.

> **Note:** When you load IDOL Site Admin, your Web browser runs a series of test HTTP requests, and displays details of any errors to assist in fixing the issues.

Configure Document Tracking

Use the following procedure to set up document tracking in IDOL Site Admin.

To configure document tracking

1. Set up a PostgreSQL database and initialize the IDOL document tracking schema.

> **Note:** Note that you cannot initialize the database schema from within IDOL Site Admin; refer to the *IDOL Server Administration Guide* for more information.

2. Configure each IDOL server to track documents into the PostgreSQL database.

3. Go to the Settings page in IDOL Site Admin, and specify the host, port, database, and logon information for the PostgreSQL database that you set up in Step 1, so that IDOL Site Admin can communicate with the database.

Start and Stop IDOL Site Admin

You can stop, start, and restart IDOL Site Admin by stopping, starting, and restarting the Tomcat application server.

Ubuntu Linux

Use the `service` command to stop, start, and restart the Tomcat application server.

```
sudo service tomcat7 stop
sudo service tomcat7 start
sudo service tomcat7 restart
```

Note: You must be able to run commands as the root user.

Windows Server 2008 R2

If you have installed Tomcat 7 as a service, use the Services snap-in (`services.msc`) to stop, start, and restart the Tomcat application server.

Note: You must have local administrator permissions.

Chapter 3: User Roles

IDOL Site Admin supports the following user roles:

- **Everyone**. IDOL Site Admin assigns this role to all users by default. This role grants no privileges. Users with only this role cannot log on to IDOL Site Admin.

- **Admin**. Users with this role can log on to IDOL Site Admin and administer IDOL Servers.

- **UserAdmin**. Users with this role have all the rights associated with the Admin role. In addition, they can create new users, delete users, change user roles, change user passwords, and change connections in the Settings page.

> **Note:** The UserAdmin role is intended for IDOL Site Admin system administrators, rather than IDOL system administrators.

Chapter 4: Monitor IDOL Site Admin

Autonomy recommends that you carry out the following tests to check that IDOL Site Admin is running properly:

- Run the service command `sudo service tomcat7 status` to check that the Tomcat 7 service is running.

- Check that Tomcat 7 is accepting TCP and HTTP connections on the configured port.

- Check that Tomcat 7 accepts HTTP connections on the location that IDOL Site Admin is deployed to (for example, `http://localhost:8080/siteadmin`), and that it responds with the **302 Moved Temporarily** status code.

JSON Health Check API

IDOL Site Admin includes a JSON health check test, which you can use in conjunction with external monitoring systems such as Nagios to check the status of the IDOL Site Admin backend components. Authentication is not required to use this feature.

To run a health check

- In your Web browser, go to `http://`*host*`:`*port*`/siteadmin/api/external/health/healthCheck.json`, where *host* and *port* are the host name or IP address and port details of your IDOL Site Admin installation.

- The output indicates the health of each component in the form of `componentName` and `state` pairs, and also shows the number of warnings or errors. For example:

```
{"componentHealth":[{"componentName":"DOC.TRACKING","state":"DISABLED"},
{"componentName":"COMMUNITY","state":"UP"},
{"componentName":"POSTGRES","state":"UP"},
{"componentName":"COORDINATOR","state":"UP"}],"numWarnings":0,"numErrors":0}
```

Log File

IDOL Site Admin includes a log file, `siteadmin.log`, that records information on events, server requests, and system changes (for example, when a user logs in, or adds a service) that might be

helpful in the event of a problem. The log file is located in the `logs` subfolder of the IDOL Site Admin home directory, and records the following information for each event:

- The date and time of the event.

- The IP address that the request came from.

- The user name that made the request.

- The type of event.

Example Log File

```
10:35:36.760                     Initializing caches
10:35:37.430                     Finished initializing caches
10:35:37.738                     APPLICATION STARTED
10:35:37.976           0:0:0:0:0:0:0:1 USER john_smith LOGGED IN
10:38:29.725           0:0:0:0:0:0:0:1 USER jane_doe LOGGED IN
11:20:59.257   john_smith      0:0:0:0:0:0:0:1 CHANGE APPLICATION CONFIGURATION
11:21:29.765   john_smith      0:0:0:0:0:0:0:1 CHANGE APPLICATION CONFIGURATION
11:35:38.286                     Deleted 19 old alert(s) older than 1209600000 ms
11:44:29.297   jane_doe        0:0:0:0:0:0:0:1 REMOVE CONTROLLER 76b3c400-9be9-8031-a2de-
005056bd5830
11:44:36.055   jane_doe        0:0:0:0:0:0:0:1 ADD CONTROLLER a57fcb00-60cd-8031-a2de-
005056bd7989
11:55:49.597   jane_doe        0:0:0:0:0:0:0:1 EXECUTED SERVICE ACTION
action=getstatistics&ResponseFormat=json ON SERVICE WITH PORT 18000 ON CONTROLLER
a57fcb00-60cd-8031-a2de-005056bd7989
11:55:51.971   john_smith      0:0:0:0:0:0:0:1 EXECUTED ACI ACTION
action=GetRequestLog&Tail=100&format=xml&ResponseFormat=json ON SERVICE WITH PORT
18000 ON CONTROLLER a57fcb00-60cd-8031-a2de-005056bd7989
```

Chapter 5: Back Up and Restore IDOL Site Admin

IDOL Site Admin stores data in the following locations:

- IDOL Site Admin configuration file

- PostgreSQL database

- IDOL Community component

- IDOL Coordinator

If you want to back up IDOL Site Admin so that you can restore your setup at a later date, you must back up the data from all four locations.

Back Up IDOL Site Admin Configuration File

The IDOL Site Admin configuration file stores all the connection settings that you can edit using the Settings page.

To back up the IDOL Site Admin configuration file

1. Find the `hp.idolsiteadmin.home` Java system property that you created during installation. This system property contains the location of the IDOL Site Admin home directory where the configuration file is stored (see "IDOL Site Admin Home Directory" on page 9 and "Configure Tomcat" on page 10 for more information).

2. Go to the location of the IDOL Site Admin home directory as specified in the `hp.idolsiteadmin.home` value, then back up the `config.json` file to another computer.

Back Up PostgreSQL Database

IDOL Site Admin uses a PostgreSQL database to store information on task history, alerts, groups, and server details.

You can use the `pg_dump` command to back up your PostgreSQL database. For more information on how to create and restore an SQL dump, refer to the PostgreSQL 9.1 documentation at http://www.postgresql.org/docs/9.1/static/backup.html.

Back Up IDOL Community component

The IDOL Community component stores information about your user accounts. To back up the Community component, use the `UserExport` action. For more information about this action, refer to the *IDOL Server Reference*.

Back Up IDOL Coordinator

IDOL Coordinator stores details of the hosts and services that you have registered with IDOL Site Admin. To back up Coordinator, use the `BackUpServer` and `RestoreServer` actions. For more information about these actions, refer to the *IDOL Server Reference*.

You can use the `pg_dump` and `pg_restore` commands to back up and restore the PostgreSQL back end component for the Coordinator. You must have PostgreSQL 9.0 or higher installed on the client machine that Coordinator is running on to use these commands. For more information on how to create and restore an SQL dump, refer to the PostgreSQL 9.1 documentation at http://www.postgresql.org/docs/9.1/static/backup.html, and the *Coordinator Reference.*

Restore IDOL Site Admin

Use the following procedure to restore IDOL Site Admin.

To restore IDOL Site Admin

1. Stop IDOL Site Admin if it is currently running.

2. Restore your original configuration file settings by replacing the existing IDOL Site Admin configuration file with the backed up file (see "Back Up IDOL Site Admin Configuration File" on the previous page for more information).

3. Use the `pg_restore` command to restore the PostgreSQL database dump (refer to the PostgreSQL 9.1 documentation at http://www.postgresql.org/ docs/9.1/static/backup.html for more information).

4. Use the `UserImport` action to restore the IDOL Community backup. For more information on this action, refer to the *IDOL Server Reference*.

5. Use the `RestoreServer` action to restore your Coordinator backup.

6. Start IDOL Site Admin. Your previous settings are restored.

Chapter 6: Cluster IDOL Site Admin

You can cluster IDOL Site Admin for high availability. For more information on how to configure this feature, refer to the Apache Tomcat Clustering/Session Replication documentation.

After you have clustered the Tomcat application servers, you should use a load balancer to route traffic to the clustered back ends. If you are running IDOL Site Admin on Ubuntu Linux, IDOL Site Admin recommends that you use HAProxy with Keepalived to maintain an active-passive load balancer configuration.

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