



# IDOL Site Admin

Software Version: 11.6

## Installation Guide

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# Chapter 1: Introduction

Micro Focus 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.

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## Prerequisites

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

- Ubuntu Linux 14.04 LTS (Trusty Tahr)
- Windows Server 2012 R2
- Java 1.8
- Internet Explorer 11
- Chrome (latest version)
- Firefox (latest version)

**NOTE:**

Micro Focus does not recommend using the third-party software beyond the End of Life dates that have been announced as follows:

- Ubuntu 14.04 LTS: April 2019
- PostgreSQL 9.3: September 2018
- Windows Server 2012 R2: September 2018

## 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 Site Admin requires access to the following Micro Focus IDOL components.

- IDOL Community component 11.6. Community manages users in IDOL Site Admin.
- IDOL Agentstore component 11.6. Agentstore is an IDOL Content component, configured to store user details for Community.
- IDOL Coordinator 11.6. Coordinator is a central monitoring service from which you can view the logs, manage components, and monitor the status of components in your wider IDOL installation. IDOL Site Admin uses this service to provide information about your system.
- IDOL Controller 11.6. Controller is installed on each machine that hosts IDOL services. It monitors the IDOL services on that machine and communicates with Coordinator.

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

**NOTE:**

IDOL Site Admin requires TCP-only network access to the Community and Coordinator components. IDOL Site Admin does **not** require network access to Agentstore or any Controller components.

You can install IDOL components separately, by downloading and installing the component ZIP packages, or you can use the full IDOL Server installer package to install all your components with IDOL Site Admin in one installer pass.

For information about how to install IDOL Site Admin and its required components, see [Install IDOL Site Admin by Using the IDOL Server Installer, on page 12](#).

For details about how to install Community and Agentstore separately, refer to the *IDOL Getting Started Guide*.

**NOTE:**

To install Agentstore from a ZIP package, you download and install the IDOL Content component, and then rename the executable and configuration files (for example, rename `content.exe` to `agentstore.exe`).

For details about how to install Controller and Coordinator separately, see [Install Controller and Coordinator, on page 23](#).

## Third-Party Software

The following third-party software might be required to use certain IDOL Site Admin functions.

- PostgreSQL 9.3. The PostgreSQL is normally optional, but it is required to use document tracking. See [Configure Document Tracking, on page 25](#).
- SMTP Server. The SMTP server is required for email alerting.

**NOTE:**

IDOL Site Admin requires TCP-only network access to PostgreSQL and SMTP Server.

## 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.

Micro Focus recommends that you set the home directory as follows:

- Linux: `/opt/siteadmin/home`
- Windows: `C:\ProgramData\SiteAdmin`

The location of the home directory is required during the installation process; see [Install IDOL Site Admin, below](#) 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.

## Install IDOL Site Admin

The following sections describe how to install IDOL Site Admin.

### Available Installer Formats

You can install IDOL Site Admin by using three different methods:

- the IDOL Server interactive installer
- the IDOL Site Admin interactive installer
- a zip package containing the IDOL Site Admin components

## IDOL Server Installer

This installer contains IDOL Site Admin as well as all the main IDOL components. This method has a larger installer package, but allows you to install IDOL Site Admin and all its required IDOL components in one pass. This option provides the simplest installation process when you want to install the main IDOL Site Admin components on a single server.

The IDOL Server installer creates all required directories, and on Windows it can optionally set up your IDOL components to run as services. During installation, you specify the IDOL Site Admin home directory and the paths for installation, as well as the ports for the IDOL components that you want to install.

## Interactive Installer

The IDOL Site Admin interactive installer contains only IDOL Site Admin. This method might be appropriate if you want to install your IDOL components on multiple machines, or if you want to use the more lightweight installation packages.

The IDOL Site Admin installer creates all required directories, and sets up IDOL Site Admin to run as a service. During installation, you specify the IDOL Site Admin home directory and the paths for installation.

## Zip Package

The ISA zip package contains an executable Java `.jar` file. Unlike traditional Java web applications, IDOL Site Admin does not require a stand-alone application server (for example, Tomcat), because one is embedded within the `.jar` file.

## Install IDOL Site Admin by Using the IDOL Server Installer

The IDOL Server installer includes all the main IDOL components, including IDOL Site Admin.

You can use this installer to install IDOL Site Admin and its required IDOL components in a single pass, which can simplify your installation process.

The following sections describe how to use the IDOL Server installer to install the required components.

### **NOTE:**

You can install most of the components that IDOL Site Admin requires on one server or multiple servers, as required.

However, you must install a Controller component on every server where you have IDOL services that you want to monitor by using IDOL Site Admin. In this case, you can either run the IDOL Server installer on each server, or you can use the Controller ZIP package to install only Controller (see [Install Controller, on page 23](#)).

## Install IDOL Site Admin on Windows

Use the following procedure to install IDOL Site Admin on Microsoft Windows operating systems, by using the IDOL Server installer.

The IDOL Server installer provides the major IDOL components. It also includes License Server, which IDOL Site Admin requires to run.

### To install IDOL Site Admin

1. Double-click the appropriate installer package:

`IDOLServer_VersionNumber_Platform.exe`

where:

*VersionNumber* is the product version.

*Platform* is your software platform.

The Setup dialog box opens.

2. Click **Next**.

The License Agreement dialog box opens.

3. Read the license agreement. Select **I accept the agreement**, and then click **Next**.

The Installation Directory dialog box opens.

4. Specify the directory to install IDOL Site Admin (and optionally other components such as License Server) in. By default, the system installs on `C:\MicroFocus\IDOLServer-VersionNumber`. Click




to choose another location. Click **Next**.

The Installation Mode dialog box opens.

5. Select **Custom**, and then click **Next**.

The License Server dialog box opens. Choose whether you have an existing License Server.

- To use an existing License Server
  - a. On the License Server dialog box, click **Yes**, and then click **Next**. The Existing License Server dialog box opens.
  - b. Specify the host and ACI port of your License Server, and then click **Next**.
- To install a new instance of License Server
  - a. On the License Server dialog box, click **No**, and then click **Next**. The Service Name dialog box opens.
  - b. In the Service name box, type the name of the Windows service to use for the License Server, and then click **Next**. The License Server dialog box opens.
  - c. Specify the ports that you want License Server to listen on, and then type the path to your IDOL license key file (`licensekey.dat`), which you obtained when you purchased IDOL Site Admin, or click  and navigate to the location. Click **Next**.

The Component Selection dialog box opens.

6. Click **Next**.

7. Select the check boxes for the components that you want to install, and specify the port information for each component, or leave the fields blank to accept the default port settings.

For each component, you can optionally provide port information to specify the ports that the component must use. The port that you choose must not be used by any other service. The installer allows you to set the following port types:

**ACI Port** The port that client machines use to send ACI actions to the component.

**Index Port** The port that client machines use to send index actions to the component. This port is available only for the Content, Agentstore, and DIH components.

**Service Port** The port that client machines use to send service requests to the component. This port is also the port that the component uses for License Server communication.

The following table lists the required components for your IDOL Site Admin installation, and the default ports that the installer uses if you do not provide an alternative value. You must change the port information if the default port value is already in use.

Component	Default port information
Agentstore	ACI Port: 9050 Index Port: 9051 Service Port: 9052
Community	ACI Port: 9030 Service Port: 9032
Controller	ACI Port: 41200 Service Port: 41202
Coordinator	ACI Port: 40200 Service Port: 40202
IDOL Site Admin	HTTP Port: 8080

You can also optionally choose to install the components as a Windows service. In this case, select **Create Windows service**. You can specify a name to use for the service, or accept the default name.

If you do not want to install the component as a service at installation time, you can choose to add the services later. See [Install an IDOL Component as a Service on Windows, on the next page](#).

Click **Next** or **Back** to move between components.

8. After you have specified your settings, the Summary dialog box opens. Verify the settings you made and click **Next**.

The Ready to Install dialog box opens.

9. Click **Next**.

The Installing dialog box opens, indicating the progress of the installation. If you want to end the installation process, click **Cancel**.

10. After installation is complete, click **Finish** to close the installation wizard.

## Install an IDOL Component as a Service on Windows

On Microsoft Windows operating systems, you can install any IDOL component as a Windows service. Installing a component as a Windows service makes it easy to start and stop the component, and you can configure a component to start automatically when you start Windows.

Use the following procedure to install IDOL Site Admin as a Windows service from a command line.

### To install a component as a Windows service

1. Open a command prompt with administrative privileges (right-click the icon and select **Run as administrator**).
2. Navigate to the directory that contains the component that you want to install as a service.
3. Send the following command:

```
Component.exe -install
```

where *Component.exe* is the executable file of the component that you want to install as a service.

The `-install` command has the following optional arguments:

<code>-start {[auto]   [manual]   [disable]}</code>	The startup mode for the component. <b>Auto</b> means that Windows services automatically starts the component. <b>Manual</b> means that you must start the service manually. <b>Disable</b> means that you cannot start the service. The default option is <b>Auto</b> .
<code>-username <i>UserName</i></code>	The user name that the service runs under. By default, it uses a local system account.
<code>-password <i>Password</i></code>	The password for the service user.
<code>-servicename <i>ServiceName</i></code>	The name to use for the service. If your service name contains spaces, use quotation marks (") around the name. By default, it uses the executable name.
<code>-displayname <i>DisplayName</i></code>	The name to display for the service in the Windows services manager. If your display name contains spaces, use quotation marks (") around the name. By default, it uses the service name.
<code>-depend <i>Dependency1</i> [,<i>Dependency2</i> ...]</code>	A comma-separated list of the names of Windows services that Windows must start before the new service. For example, you might want to add the License Server as a dependency.

For example:

```
Component.exe -install -servicename ServiceName -displayname "Component Display Name" -depend LicenseServer
```

After you have installed the service, you can start and stop the service from the Windows Services manager.

When you no longer require a service, you can uninstall it again.

### To uninstall an IDOL Windows Service

1. Open a command prompt.
2. Navigate to the directory that contains the component service that you want to uninstall.
3. Send the following command:

```
Component.exe -uninstall
```

where *Component.exe* is the executable file of the component service that you want to uninstall.

If you did not use the default service name when you installed the component, you must also add the *-servicename* argument. For example:

```
Component.exe -uninstall -servicename ServiceName
```

## Install IDOL Site Admin on UNIX

Use the following procedure to install IDOL Site Admin in text mode on UNIX platforms.

### To install IDOL Site Admin on UNIX

1. Open a terminal in the directory in which you have placed the installer, and enter the following command:

```
./IDOLServer_VersionNumber_Platform.exe --mode text
```

where:

*VersionNumber* is the product version

*Platform* is the name of your UNIX platform

**NOTE:**

Ensure that you have execute permission for the installer file.

The console installer starts and displays the Welcome screen.

2. Read the information and then press the `Enter` key.  
The license information is displayed.
3. Read the license information, pressing `Enter` to continue through the text. After you finish reading the text, type `y` to accept the license terms.
4. Type the path to the location where you want to install the servers, or press `Enter` to accept the default path.  
The Installation Mode screen is displayed.
5. Press `2` to select the Custom installation mode.  
The License Server screen opens. Choose whether you have an existing License Server.
  - To use an existing License Server, type `y`. Specify the host and port details for your License Server (or press `Enter` to accept the defaults), and then press `Enter`. Go to Step 7.
  - To install a new instance of License Server, type `n`.
6. If you want to install a new License Server, provide information for the ports that the License



Server uses.

- a. Type the value for the ACI Port and press `Enter` (or press `Enter` to accept the default value).

**ACI Port** The port that client machines use to send ACI actions to the License Server.

- b. Type the value for the Service Port and press `Enter` (or press `Enter` to accept the default value).

**Service Port** The port by which you send service actions to the License Server. This port must not be used by any other service.

- c. Type the location of your IDOL license key file (`licensekey.dat`), which you obtained when you purchased IDOL Site Admin. Press `Enter`.

7. The Component Selection screen is displayed. Press `Enter`. When prompted, type `y` for the components that you want to install. Specify the port information for each component, and then press `Enter`. Alternatively, leave the fields blank and press `Enter` to accept the default port settings.

For each component, you can optionally provide port information to specify the ports that the component must use. The port that you choose must not be used by any other service. The installer allows you to set the following port types:

**ACI Port** The port that client machines use to send ACI actions to the component.

**Index Port** The port that client machines use to send index actions to the component. This port is available only for the Content, Agentstore, and DIH components.

**Service Port** The port that client machines use to send service requests to the component. This port is also the port that the component uses for License Server communication.

The following table lists the required components for your IDOL Site Admin installation, and the default ports that the installer uses if you do not provide an alternative value. You must change the port information if the default port value is already in use.

Component	Default port information
Agentstore	ACI Port: 9050 Index Port: 9051 Service Port: 9052
Community	ACI Port: 9030 Service Port: 9032
Controller	ACI Port: 41200 Service Port: 41202
Coordinator	ACI Port: 40200 Service Port: 40202
IDOL Site Admin	HTTP Port: 8080

**NOTE:**  
These ports must not be used by any other service.

The Init Scripts screen is displayed.

8. Type the user that the server should run as, and then press `Enter`.

**NOTE:**  
The installer does not create this user. It must exist already.

9. Type the group that the server should run under, and then press `Enter`.

**NOTE:**  
If you do not want to generate init scripts for installed components, you can simply press `Enter` to move to the next stage of the installation process without specifying a user or group.

The Summary screen is displayed.

10. Verify the settings that you made, then press `Enter` to begin installation.

The Installing screen is displayed.

This screen indicates the progress of the installation process.

The Installation Complete screen is displayed.

11. Press `Enter` to finish the installation.

## Install an IDOL Component as a Service on Linux

On Linux operating systems, you can configure a component as a service to allow you to easily start and stop it. You can also configure the service to run when the machine boots. The following procedures describe how to install IDOL Site Admin as a service on Linux.

**NOTE:**  
To use these procedures, you must have `root` permissions.

**NOTE:**  
When you install IDOL Site Admin on Linux, the installer prompts you to supply a user name to use to run the server. The installer populates the init scripts, but it does not create the user in your system (the user must already exist).

The procedure that you must use depends on the operating system and boot system type.

- For Linux operating system versions that use `systemd` (including CentOS 7, and Ubuntu version 15.04 and later), see [Install a Component as a Service for a `systemd` Boot System](#), below.
- For Linux operating system versions that use System V, see [Install a Component as a Service for a System V Boot System](#), on the next page.

### Install a Component as a Service for a `systemd` Boot System

**NOTE:**  
If your setup has an externally mounted drive that IDOL Site Admin uses, you might need to

modify the init script. The installed init script contains examples for an NFS mount requirement.

### To install an IDOL component as a service

1. Run the appropriate command for your Linux operating system environment to copy the init scripts to your `init.d` directory.

- Red Hat Enterprise Linux (and CentOS)

```
cp IDOLInstalLDir/scripts/init/systemd/componentname
/etc/systemd/system/componentname.service
```

- Debian (including Ubuntu):

```
cp IDOLInstalLDir/scripts/init/systemd/componentname
/lib/systemd/system/componentname.service
```

where *componentname* is the name of the init script that you want to use, which is the name of the component executable (without the file extension).

For other Linux environments, refer to the operating system documentation.

2. Run the following commands to set the appropriate access, owner, and group permissions for the component:

- Red Hat Enterprise Linux (and CentOS)

```
chmod 755 /etc/systemd/system/componentname
chown root /etc/systemd/system/componentname
chgrp root /etc/systemd/system/componentname
```

- Debian (including Ubuntu):

```
chmod 755 /lib/systemd/system/componentname
chown root /lib/systemd/system/componentname
chgrp root /lib/systemd/system/componentname
```

where *componentname* is the name of the component executable that you want to run (without the file extension).

For other Linux environments, refer to the operating system documentation.

3. (Optional) If you want to start the component when the machine boots, run the following command:

```
systemctl enable componentname
```

## Install a Component as a Service for a System V Boot System

### To install an IDOL component as a service

1. Run the following command to copy the init scripts to your `init.d` directory.

```
cp IDOLInstalLDir/scripts/init/systemv/componentname /etc/init.d/
```

where *componentname* is the name of the init script that you want to use, which is the name of the component executable (without the file extension).

2. Run the following commands to set the appropriate access, owner, and group permissions for the

component:

```
chmod 755 /etc/init.d/componentname  
chown root /etc/init.d/componentname  
chgrp root /etc/init.d/componentname
```

3. (Optional) If you want to start the component when the machine boots, run the appropriate command for your Linux operating system environment:

- Red Hat Enterprise Linux (and CentOS):

```
chkconfig --add componentname  
chkconfig componentname on
```

- Debian (including Ubuntu):

```
update-rc.d componentname defaults
```

For other Linux environments, refer to the operating system documentation.

## Install IDOL Site Admin by Using the Interactive Installer

Use the following procedure to install IDOL Site Admin on Windows or Linux by using the interactive installer.

**NOTE:**

On Windows, the interactive installer requires .NET Framework 2.0.

### To install IDOL Site Admin

1. Run the correct version of the installer for either Windows or Linux as an Administrator user.
2. Follow the instructions in the installation wizard, supplying the correct information when prompted.

IDOL Site Admin is installed at the location you specify. IDOL Site Admin is available on your machine as a service named `MicroFocus-SiteAdmin`, which you can start and stop from command line or the Windows services manager.

**NOTE:**

By default, the installer stores the IDOL Site Admin home directory in the `ProgramData` folder, which might be hidden by default in Windows.

When you start IDOL Site Admin, it automatically creates the required user roles in IDOL Community. A user must be a member of one of these roles to log into IDOL Site Admin. See [User Roles, on page 29](#) for more information.

Start IDOL Site Admin and follow the steps in [Configure IDOL Site Admin, on page 24](#) to complete the installation.

## Install IDOL Site Admin Manually by Using the Zip Package

The following sections describe how to install IDOL Site Admin by using the zip package.

## Use the Executable .jar File to Run IDOL Site Admin

Download and extract the files from the installer zip file. The zip file contains the `siteadmin.jar` executable .jar file, and an `install` directory.

Use the following command to run IDOL Site Admin:

```
Java -Didol.idolsiteadmin.home=[home directory] -Dserver.port=[port] -jar  
siteadmin.jar -uriEncoding utf-8
```

### NOTE:

On Linux, Micro Focus recommends that you use `/opt/siteadmin` as the install directory, and `/opt/siteadmin/home` as the home directory. On Windows, the home directory might be `C:\ProgramData\SiteAdmin`. In either case, ensure that the user running IDOL Site Admin has read and write permissions for the home directory.

To continue the installation, follow the steps in [Configure IDOL Site Admin, on page 24](#).

## Install IDOL Site Admin as a Service on Linux

Use the following procedure to install IDOL Site Admin as a service on Linux.

1. Create a user and group to run IDOL Site Admin. Micro Focus recommends that you use `siteadmin` as both the user name and the group name:  

```
$ useradd siteadmin
```
2. Create a directory in which to install IDOL Site Admin. Micro Focus recommends that you use `/opt/siteadmin` as the installation directory:  

```
$ mkdir /opt/siteadmin
```
3. Create a directory to serve as the home directory for IDOL Site Admin. Micro Focus recommends that you use `/opt/siteadmin/home` as the home directory:  

```
$ mkdir /opt/siteadmin/home
```
4. Copy `siteadmin.jar` to the installation directory:  

```
$ cp siteadmin.jar /opt/siteadmin/
```
5. Recursively change the ownership of the installation directory:  

```
$ chown -R siteadmin:siteadmin /opt/siteadmin
```
6. Deploy the startup script.

### System V

```
$ cp install/linux/sysv/siteadmin.sh /etc/init.d/siteadmin  
$ chmod +x /etc/init.d/siteadmin  
$ update-rc.d siteadmin defaults 99
```

### Upstart

```
$ cp install/linux/upstart/siteadmin.conf /etc/init/  
$ chmod +x /etc/init/siteadmin.conf
```

7. If you have used any non-default paths or settings during installation, edit the startup script to contain the corresponding values.
8. Start the application.

#### System V

```
$ sudo /etc/init.d/siteadmin start
```

#### Upstart

```
$ sudo service siteadmin start
```

To continue the installation, follow the steps in [Configure IDOL Site Admin, on page 24](#).

## Install IDOL Site Admin as a Windows Service

To run IDOL Site Admin as a Windows service, you must download a copy of the Windows service wrapper from <https://github.com/ft-idol/winsw>, and change the name of the `winsw.exe` executable file to `siteadmin.exe`.

Ensure that the IDOL Site Admin home directory and port are correctly configured in the `siteadmin.xml` configuration file. You must also ensure that `siteadmin.exe`, `siteadmin.xml`, and `siteadmin.jar` are all in the same directory.

Run the following command from the Windows command line to install IDOL Site Admin as a service:

```
siteadmin.exe install
```

#### NOTE:

You can also use the following commands with `siteadmin.exe`:

- `uninstall`
- `start`
- `stop`
- `status`

For more information, see <https://github.com/ft-idol/winsw>.

To continue the installation, follow the steps in [Configure IDOL Site Admin, on page 24](#).

## Upgrade IDOL Site Admin

#### NOTE:

Micro Focus recommends that you back up IDOL Site Admin before you upgrade. See [Back Up and Restore IDOL Site Admin, on page 33](#).

To upgrade to IDOL Site Admin 11.6 from a previous version, Micro Focus recommends that you keep your existing home directory, and use this location as the home directory for the upgraded installation when you run the installer.

You can also upgrade IDOL Site Admin by replacing the existing `siteadmin.jar` file with the updated version.

## Install Controller and Coordinator

The Coordinator server is the central point from which you can view the logs, manage components, and monitor the status of components. The Controller server performs the direct monitoring of IDOL services, and communicates with the Coordinator server.

You install one Coordinator component, usually on the same server as your IDOL Site Admin. You must then install a Controller on each host that runs IDOL system components. The Coordinator connects to all available Controllers, and collects status information.

- [Install Controller](#) ..... 23
- [Install Coordinator](#) ..... 24

## Install Controller

Use the following procedure to install a Controller server by using the ZIP package.

### To install Controller

1. Download the appropriate Controller ZIP package for your operating system from the software enablement site.
2. Extract the files to a location on your system.
3. Open the Controller configuration file (`Controller.cfg`) in a text editor.
4. Specify the host and port details for your License Server in the `[License]` section of the configuration file.
5. (Optional) If you want to start Controller without SSDP support, set `Enabled` to `False` in the `[SSDP]` section of the configuration file for that Controller.

#### NOTE:

If you switch off SSDP support for Controller, this is recorded in the application log. The Controller is not included in the list of discovered Controllers in a `GetController` action sent to your Coordinator. In addition, you must add the Controller to your Coordinator by manually specifying the port number and IP address or host name, rather than selecting it from a list of discovered Controllers.

6. Save and close the configuration file.
7. Open a command prompt and run the Controller executable file (`Controller.exe`). The Controller starts and automatically discovers any IDOL services on the server that it is running on.

You can optionally install Controller as a service. See [Install an IDOL Component as a Service on Windows, on page 15](#) or [Install an IDOL Component as a Service on Linux, on page 18](#).

After you install your Controllers, you can use the IDOL Site Admin interface to add the IDOL services that you want to monitor.

If required, you can also send actions directly to Controller. For more information about the available actions, refer to the *Controller Reference*.

## Install Coordinator

Use the following procedure to install a Coordinator server by using the ZIP package.

### To install Coordinator

1. Download the appropriate Coordinator ZIP package for your operating system from the software enablement site.
2. Extract the files to a location on your system.
3. Open the Coordinator configuration file (`Coordinator.cfg`) in a text editor.
4. Specify the host and port details for your License Server in the `[License]` section of the configuration file.
5. Save and close the configuration file.
6. Open a command prompt and run the Coordinator executable file (`Coordinator.exe`). The Coordinator starts and automatically discovers any Controllers.

You can optionally install Coordinator as a service. See [Install an IDOL Component as a Service on Windows, on page 15](#) or [Install an IDOL Component as a Service on Linux, on page 18](#).

After you install Coordinator, you can use the IDOL Site Admin interface to add the Controllers that you want to monitor.

If required, you can also send actions directly to Coordinator. For more information about the available actions, refer to the *Coordinator Reference*.

## Start and Stop IDOL Site Admin

You can stop, start, and restart IDOL Site Admin by stopping, starting, and restarting the `MicroFocus-SiteAdmin` service or the executable `.jar` file, depending on how you decided to run IDOL Site Admin.

## Configure IDOL Site Admin

After you have installed and started IDOL Site Admin, and the relevant IDOL components, you can perform the initial configuration by using the IDOL Site Admin interface.

### To configure IDOL Site Admin for the first time

1. Open one of the supported web browsers and go to `http://ServerName:Port`, where `ServerName` is the host name or IP address of the IDOL Site Admin host, and `Port` is the port that you have configured IDOL Site Admin to run on. By default, the port number is `8080`.  
A login screen opens.
2. Go to the IDOL Site Admin home directory and open the configuration file (`config.json`) in a text editor. See [IDOL Site Admin Home Directory, on page 11](#) for more information.



3. Use the default user name and password in the login section of the configuration file to log on. For example:

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

**NOTE:**

IDOL Site Admin populates the login page with the default user name when you log on for the first time.

The Settings page opens.

4. On the Settings page, enter the connection details for the external requirements that are listed in [Prerequisites, on page 9](#). Click **Test Connection** for each section to check that IDOL Site Admin can connect to each component.

**NOTE:**

You can connect to your IDOL Community component by using `http` or `https`. If you choose `https`, you must configure Community to use SSL.

5. On the Settings screen you can configure the IDOL Site Admin database. You can choose from either **Embedded** (the default) or **PostgreSQL**. If you choose an embedded database, a data directory containing the database files is created in the IDOL Site Admin home directory. If you choose Postgres, you need to set up your own PostgreSQL database and specify the host, port, and login information so that IDOL Site Admin can communicate with the database. See [Install and Configure PostgreSQL, on page 11](#) for more information.
6. After IDOL Site Admin connects to the IDOL Community component, you can no longer use the default administrator user name. From the Users page in the Settings menu, go to the User Management page to create user details in the IDOL Community component. See [User Roles, on page 29](#) for more information.

**NOTE:**

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

7. Click **Save Changes**.
8. To log in to IDOL Site Admin, continue to move through the Settings wizard.

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. Follow the instructions in the *IDOL Server Administration Guide* to initialize the IDOL document tracking schema.

**NOTE:**

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.

## Configure Index Clients

If you want to use the Controller and Coordinator servers to run and track index commands that you submit by using the IDOL Site Admin interface, you must configure your Coordinator server as an index client in each Controller configuration file (`controller.cfg`). For more information, refer to the *Controller Reference*.

## Configure IDOL Site Admin to Use SSL

By default, IDOL Site Admin runs in plain HTTP mode. You can configure it to use SSL communications, by setting the appropriate system properties in the Java run command.

**NOTE:**

If you enable SSL, you cannot use plain HTTP with IDOL Site Admin.

### To configure IDOL Site Admin to use SSL

- Start IDOL Site Admin with the Java run command, and include the following arguments:

```
-Dserver.ssl.key-store=path_to_keystore  
-Dserver.ssl.key-store-password=keystore_password  
-Dserver.ssl.key-password=key_password  
-Dserver.port=server_port
```

where,

*path\_to\_keystore*

is the path to a keystore. You must create a keystore and import your certificates into it. By default, IDOL Site Admin expects this keystore to be in JKS format. For more information on JKS keystore creation, see <https://docs.oracle.com/cd/E19509-01/820-3503/ggfen/index.html>.

**NOTE:**

If you want to use a keystore in a different format, you must also set the `-Dserver.ssl.key-store-type` argument to the type of keystore that you

	want to use. For example: <code>-Dserver.ssl.key-store-type=pkcs12</code>
<code>keystore_password</code>	is the password for the keystore.
<code>key_password</code>	is the password for the key inside the keystore.
<code>server_port</code>	is the port to user for IDOL Site Admin. To use SSL, you must change this value from the default port (that is, you must not use port 8080). Typically you use port 8443, but you can use any valid port value.

For example:

```
java -Dserver.ssl.key-store=/etc/ssl/private/keystore.jks -Dserver.ssl.key-store-password=MyPassword -Dserver.ssl.key-password=KeyPassword -Didol.idolsiteadmin.home=[home directory] -Dserver.port=8443 -jar siteadmin.jar -uriEncoding utf-8
```

If you run IDOL Site Admin as a service on Windows, you can also add the same arguments to the `siteadmin.xml` file.

If you run IDOL Site Admin as a service on Linux, you can add the argument to the existing arguments variable in `siteadmin.sh` for SysV, or `siteadmin.conf` for Upstart.

When you modify the IDOL Site Admin configuration by modifying the XML file or start scripts, you must restart IDOL Site Admin to apply your configuration changes.

For more information on installing and running IDOL Site Admin as a service on Windows or Linux, see [Install IDOL Site Admin, on page 11](#).

## Configure IDOL Site Admin to Use OEM Encryption

In an OEM environment, IDOL components use OEM encryption to communicate.

You can configure IDOL Site Admin to use OEM encryption to communicate with the IDOL Community component and the Coordinator component.

## Start IDOL Site Admin in OEM Encryption Mode

The following example shows you how to set up OEM encryption in your IDOL Site Admin system properties.

### To configure IDOL Site Admin to use OEM Encryption

- Start IDOL Site Admin with the Java run command, and include the following arguments:

```
-Didol.idolsiteadmin.oemEncryptionKey=oem_encryption_key
```

where,

<code>oem_encryption_key</code>	is your OEM encryption key string.
---------------------------------	------------------------------------

For example:

```
java -Didol.idolsiteadmin.oemEncryptionKey=MjR8CJUGcb4RbRdNDKbK9RXX3pEswAiZ -  
Didol.idolsiteadmin.home=[home directory] -Dserver.port=8443 -jar siteadmin.jar -  
uriEncoding utf-8
```

If you run IDOL Site Admin as a service on Windows, you can also add the same arguments to the `siteadmin.xml` file.

If you run IDOL Site Admin as a service on Linux, you can add the argument to the existing arguments variable in `siteadmin.sh` for SysV, or `siteadmin.conf` for Upstart.

When you modify the IDOL Site Admin configuration by modifying the XML file or start scripts, you must restart IDOL Site Admin to apply your configuration changes.

For more information on installing and running IDOL Site Admin as a service on Windows or Linux, see [Install IDOL Site Admin, on page 11](#).

After you start IDOL Site Admin, you can configure the details of your IDOL components on the settings page in the usual way. See [Configure IDOL Site Admin, on page 24](#).

## 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

- [JSON Health Check API](#) .....31
- [Log File](#) ..... 31
  - [Example Log File](#) .....32

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

- Run the service command `sudo service siteadmin status` to check that the IDOL Site Admin service is running.
- Check that IDOL Site Admin is accepting TCP and HTTP connections on the configured port.
- Check that IDOL Site Admin accepts HTTP connections on the location that IDOL Site Admin is deployed to (for example, `http://localhost:8080/`), 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 back-end components. Authentication is not required to use this feature.

### To run a health check

- In your Web browser, go to `http://host:port/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 on, or adds a service) that might be helpful if there is an issue. 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           0:0:0:0:0:0:1 USER john_smith LOGGED IN
10:38:29.725           0:0:0:0:0:0:1 USER jane_doe LOGGED IN
11:20:59.257 john_smith 0:0:0:0:0:0:1 CHANGE APPLICATION CONFIGURATION
11:21:29.765 john_smith 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 0:0:0:0:0:0:1 REMOVE CONTROLLER 76b3c400-9be9-8031-a2de-
005056bd5830
11:44:36.055 jane_doe 0:0:0:0:0:0:1 ADD CONTROLLER a57fcb00-60cd-8031-a2de-
005056bd7989
11:55:49.597 jane_doe 0:0:0:0:0:0:1 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 0:0:0:0:0:0:1 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](#) ..... 33
- [Back Up PostgreSQL Database](#) ..... 33
- [Back Up IDOL Community component](#) ..... 34
- [Back Up Coordinator](#) ..... 34
- [Restore IDOL Site Admin](#) ..... 34

## Back Up IDOL Site Admin Configuration File

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

### To back up the IDOL Site Admin configuration file

1. Find the `idol.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 11 for more information).
2. Go to the location of the IDOL Site Admin home directory as specified in the `idol.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 IDOL Community component, use the `UserExport` action. For more information about this action, refer to the *IDOL Server Reference*.

## Back Up Coordinator

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, Micro Focus recommends that you use HAProxy with Keepalived to maintain an active-passive load balancer configuration.



# Send documentation feedback

If you have comments about this document, you can [contact the documentation team](#) by email. If an email client is configured on this system, click the link above and an email window opens with the following information in the subject line:

## **Feedback on Installation Guide (Micro Focus IDOL Site Admin 11.6)**

Add your feedback to the email and click **Send**.

If no email client is available, copy the information above to a new message in a web mail client, and send your feedback to [swpdl.idoldocsfeedback@microfocus.com](mailto:swpdl.idoldocsfeedback@microfocus.com).

We appreciate your feedback!