



IBM Software Group | Lotus Expeditor 6.1.1 education

Lotus® Expeditor Client for Desktop

Installation overview

Lotus software



@ business on demand software

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This presentation provides you with an overview of the desktop client install for Lotus Expeditor

Goals

- Understand how to install and configure the Expeditor Client for Desktop

The goals of this presentation are to understand how to install and configure the Expeditor Client for Desktop.

Agenda

- Installation
- Configuration

The agenda is to cover two topics. The first topic is installation of the desktop client and the installation options. The second topic is how to configure the desktop client.

Section

Desktop client installation

The first section discussed is the desktop client installation.

CD or image contents

- autorun.html -> docs/Index.html
 - ▶ Installation guide
 - ▶ Link to release notes
- desktop
 - ▶ install - installation executable files for the desktop
 - ▶ updates/platform – update site for the desktop
- device
 - ▶ install - installation executable files for the device
 - ▶ updates – update site for the device

The client can be installed from a CD image or from a downloadable image. The install image contents are organized into several directories.

In the root directory there is an autorun.html file which will display the Installation Guide. The Installation Guide includes information on how to install the desktop client as well as the device client. It has links to the installation executable, as well as links to the Release Notes.

Under the desktop and device directories, the executable installation files can be found, as well as the update sites.

CD or image contents (continued)

- doc/<locale>
 - ▶ Users_Guide.pdf : Information on how to use the platform
 - ▶ System_Admin_Guide.pdf : Information on how to administer the platform
 - ▶ Expeditor_Client_Install_Guide.html : Install guide
 - ▶ Client_Rel_Notes.html : Release Notes
- license
 - ▶ License files for desktop and device
- nci
 - ▶ installation files for the network client installer
- quickstart/<locale>
 - ▶ Expeditor_QSG.pdf : Quick start guide
- utils
 - ▶ DB2eCLP – utility to import and export DB2e data for the device client
 - ▶ NativeAppBundle – native app bundle tool for the device client
 - ▶ jclDevice/<files> – debug files for the device client

This slide will continue to cover the install image contents.

The Users Guide and System Administration Guide can be found in the docs directory in pdf format. Also in this directory are the Release notes and the Readme html files.

The license directory holds the desktop and device licenses.

The nci directory holds all installation files for the network client installer. The network client installer provides the ability to install the client from a web server or a portal server, as well as providing administrative portlets for portal managed clients.

The utils directory contains tools for developers. These include the native app bundle tool which is used for device management bundles. The DebugPackage.zip file contains debug files for the device client and the ResourceChecker.zip file provides a resource checker for device clients.

Installation pre-requisites

- Minimum hardware requirements
 - ▶ 512 MB RAM
 - ▶ 200 MB disk space
 - ▶ x86 processor capable of running the supported client platforms
- Client platforms supported
 - ▶ Microsoft® Windows Vista™
 - ▶ Microsoft Windows® XP Professional Service Pack 1 and 2
 - ▶ Microsoft Windows XP Home Edition Service Pack 1 and 2
 - ▶ Microsoft Windows XP Tablet PC Edition 2005
 - ▶ RedHat EL 4.0 WS with GTK support - Update 4
 - ▶ RedHat EL 5.0 WS with GTK support
 - ▶ SUSE Linux® Enterprise Desktop (SLED) 10
 - ▶ Microsoft Windows 2000 – Service Pack 4

To install the Expeditor Client for Desktop the following pre-requisites must be met. Minimum hardware requirements are 512 MB of RAM, 200 MB of disk space and an x86 processor capable of running the supported client platforms, as listed on the slide.

Installation types

- Standard installation
 - ▶ From CD or download image
 - ▶ Installs the desktop client
 - ▶ Use setupwin32.exe or setuplinux.sh to install
- Network client installer
 - ▶ Enables the desktop client to be remotely installed from a Web server or portal server

The Expeditor client for desktop can be installed from a CD or from a downloadable image. To start the installation of the desktop client select the appropriate install executable for your client platform.

The Network Client Installer provides the support to setup a download site on a Web server or a portal server, for users to download and install the Expeditor client.

Installation options - Standard installation

- Standard installation
 - ▶ Installs the set of features sufficient to run the platform
- Post-installation updates
 - ▶ Additional features can be installed later from an update site
- Locale specific features are organized into group 1, group 2 and group 3 language features
 - ▶ Language pack installed based on system locale setting
 - ▶ Additional groups can be optionally installed from the platform update site

The Expeditor client for desktop is installed initially with the set of features necessary to run the platform. The language features are installed based on the system setting. After installation is complete, additional features can be installed from a update site. Additional language groups can also be installed optionally from the platform update site.

Installation options – Single or multi-user

- Configuration supported during installation
 - ▶ Select single user or multiuser installation
- Single user installation
 - ▶ Default
- Multi-user installation
 - ▶ Will generate icons for all users on the system
 - ▶ Intended for use in instances where multiple people share a workstation, such as a workstation used as a kiosk with individual operating system log-ins.

During install of the Expeditor client for desktop the user has the option to select single user or multi-user install.

The default selection is single user. If multi-user install is selected, icons will be generated for all users on the system. Multi-user install also installs a service that will allow multiple users to access the product at the same time.

Installation options – Enterprise management agent

- Agent configuration during installation
 - ▶ Device user name and password
 - ▶ Management server location
- For post-installation configuration use the enterprise management agent preference page

The next installation option presented to the user is configuring the client as a server managed client. If the user selects to have their client server managed, they are prompted to configure the Enterprise management settings. These settings can be completed or modified after install using the enterprise management agent preference page.

Installation options – Portal managed client

- Configuration supported during installation
 - ▶ Portal server location
- For post-install configuration use the home portal account preference page

The next install option presented to the user is configuring the client as a portal managed client. If the user selects to have their client portal server managed, they are prompted for the portal server location. This setting can also be entered or modified after install, by using the home portal account preference page.

Installation options – Password prompt

- Configuration supported during installation
 - ▶ Would you like the platform to prompt for a password before startup?
 - ▶ Yes
 - User is prompted to provide and confirm a password
 - User will be prompted for this password on each restart of the platform
 - ▶ No
 - The user will not be prompted for a password
- Multi-user installation
 - ▶ Additional option
 - Should the user be allowed to choose to be prompted for a password.
- For post-installation configuration
 - ▶ Use the password preference page

The next install option presented to the user is the password prompt. The user can select whether to be prompted for a password each time the platform is restarted. If the user selects this option, they are prompted to enter a password of their choice and confirm that password the first time the platform is restarted after install. This setting can also be entered or modified after install, by using the password preference page. In a multiuser install there is an additional install panel which allows an administrator to choose whether a user is allowed to choose not to be prompted for a password.

Installation options - Upgrade

- Previous version of the Expeditor Client V6.1 is detected during installation
 - ▶ User is presented with an upgrade panel
 - ▶ Settings will be upgraded and the installation continues
 - ▶ Applications and some configuration information will be copied from the Expeditor 6.1 installation
 - ▶ The workspace location will be preserved from the 6.1 installation
 - This location is <user home directory>/IBM/RCP/<rcp_install_ID>/<user name>.
 - ▶ User should follow up the upgrade with an application verification test.
 - ▶ If an application fails, uninstall and perform a fresh install of the application into the Expeditor client
- Expeditor Client V6.0 is installed on the system
 - ▶ User must first install and migrate to V6.1 using the V6.1 installer and then upgrade to V6.1.1

During installation, the installer checks for the previous version of the Expeditor Client version 6.1. If it is found the installation program presents a upgrade panel to the user.

The panel shows where Expeditor 6.1 was found, and asks the user if they would like to upgrade to Expeditor 6.1.1, If upgrade is selected, settings will be upgraded and the installation continues.

The workspace location will be preserved from the 6.1 installation.

The user should verify that their applications run successfully after upgrade. If an application fails, uninstall the application and perform a fresh install of the application into the Expeditor Client.

If the Expeditor Client version 6.0 is installed, the user must first install and migrate to version 6.1 using the 6.1 installer and then upgrade to version 6.1.1.

Install layout

- Plug-in and feature locations
 - ▶ c:\Program Files\IBM\Lotus\Expeditor (default install directory on Windows)
 - ▶ /opt/ibm/Lotus/Expeditor (default install directory on Linux)
 - eclipse – Plug-ins provided by eclipse.org
 - rcp – Plug-ins provided by IBM
 - shared – Intended for application plug-ins that are to be shared by multiple users
 - ▶ User directory
 - <workspace>\Application Data\Lotus\XPD\applications– applications only available to this user
 - Example: Windows: C:\Documents and Settings\user99\Application Data\Lotus\XPD\applications
 - ▶ NOTE: Each directory has a features and plug-ins sub-directory
- Launcher
 - ▶ <install location>\rcp\rcplauncher.exe
 - ▶ <install location>/rcp/rcplauncher
- Main configuration file
 - ▶ <workspacedir>\.config/rcpinstall.properties
 - ▶ Example
 - C:\Documents and Settings\user99\Application Data\Lotus\XPD\.config\rcpinstall.properties

After the install completes, the application is located on the file system where specified. The default location on a Windows system is C:\Program Files\IBM\Lotus\Expeditor. The launcher is located in the install directory and the main configuration file, the rcpinstall.properties file, is located in the workspace under the .config directory.

Additional installation topics

- **Silent installation**
 - ▶ No panels are displayed during the installation
 - ▶ No prompts for input
 - ▶ Simplifies installation process for inexperienced users
 - ▶ Documented in the system administrator's guide
- **Customized installation**
 - ▶ Enables distribution of a customized platform (such as additional features)
 - ▶ Would typically be used within an enterprise deployment
 - ▶ Documented in the system administrator's guide
- **Installing with the restricted workbench service**
 - ▶ Provides a restricted environment in which all Lotus Expeditor users are limited to the applications and operating system services that the administrator has configured
 - ▶ Documented in the system administrator's guide

Optional install methods include silent installation, customized installation and installing with the restricted workbench service.

A silent install allows an administrator to set up an install where the user is not prompted, thereby simplifying the installation process for inexperienced users.

A customized install enables the distribution of a customized platform, such as installing additional features during install.

The install of the restricted workbench service provided a restricted environment in which users are limited to the applications and operating system services that the administrator has configured.

All of these optional installs are documented in the System Administrator's Guide.

Customized install – Provisioning components

- The Expeditor client installation two step process:
 - ▶ Install core platform files
 - ▶ Provision additional components
- The set of components to be provisioned is defined within install manifests
 - ▶ user.xml or multiuser.xml
 - ▶ Must be located in a deploy/ directory (same location as the installer executable)
- Copy the contents of the install/ directory to a read-write file system (as in the case of a Web download scenario)
 - ▶ modify these install configurations to include a customized set of components
- During the installation process, the install manifest corresponding to the chosen install configuration is processed (replacing any supported variables) and copied to `<product destination>/rcp/deploy/install.xml`
- The location of this file is then passed to the platform provisioning component to begin the provisioning process

The Expeditor Client installation process consists of two steps: installation of core platform files and provisioning of additional components. Depending on the desired install configuration (user or multiuser), differing sets of components are provisioned to the product from update sites.

The set of components to be provisioned is defined within install manifests, which are processed by the installer and platform provisioning system. These files must be present in a `deploy/` directory located in the same location as the installer executable. The install manifests must be named `user.xml` or `multiuser.xml` (corresponding to the available install configurations).

The Expeditor Client CD includes an install manifest for each of these install configurations. You cannot modify these files because they reside on the CD. However, if the contents of the `install/` directory were copied to a read-write file system (as in the case of a Web download scenario), then the files can be modified to have each of these install configurations include a customized set of components.

Note: Modifying these install manifests from their shipped states could result in an invalid platform installation.

During the installation process, the install manifest corresponding to the chosen install configuration is processed (replacing any supported variables) and copied to `<product destination>/rcp/deploy/install.xml`. The location of this file is then passed to the platform provisioning component to begin the provisioning process.

Customized installation – Installation manifest

- The installation manifest is an XML file that lists the features to be installed during the provisioning portion of the install process.
 - ▶ The structure of the installation manifest is:

```
<ibm-portal-composite>
  <domain-object name="com.ibm.rcp.installmanifest">
    <object-data>
      <install>
        <installfeature>
          <requirement>
            <feature/>
          </requirement>
        </installfeature>
      </install>
    </object-data>
  </domain-object>
</ibm-portal-composite>
```

The install manifest is an XML file that lists the features to be installed during the provisioning portion of the install process. The structure of the install manifest is shown on this slide.

Customized installation – Installation manifest

- The install manifest may have any number of <feature> tags
- Each <feature> tag is used to list one feature that is to be provisioned to the platform during the install
- The <feature> tag has the following attributes:
 - ▶ id – The ID of the feature to be provisioned
 - ▶ version - The version of the feature to be provisioned
 - ▶ url - The URL to the update site where the feature can be found
 - ▶ And more optional attributes

```
<feature
  id="com.ibm.rcp.samples.orderentry.feature"
  version="6.1.0.0-20060815"
  url="$(installer.root)/../updates/platform"
  size="25"
/>
```

The install manifest may have any number of <feature> tags. Each <feature> tag is used to list one feature that is to be provisioned to the platform during the install. The <feature> tag requires the following attributes:

id – The ID of the feature to be provisioned.

version - The version of the feature to be provisioned.

url - The URL to the update site where the feature can be found.

Plus additional optional attributes can be specified.

Using this install manifest structure, any number of features can be specified, and each feature can come from different originating update sites.

Restricted workbench service

- Can only be enabled during initial installation
 - it can not be added to an existing installation
- Is available in multiuser installation environments only
- **multiuser.xml** install manifest must contain the following information:

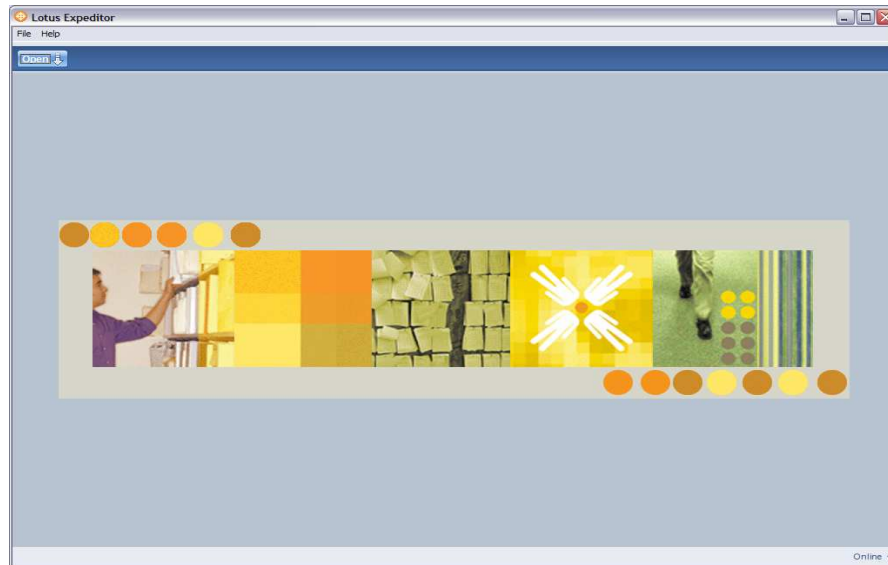
```
<feature
  id="com.ibm.rcp.lockdown.feature"
  url="{installer_root}/../updates/platform"
  version="<feature version>"
  config="user"
/>
```

Enable the Restricted Workbench Service to provide a restricted environment in which all Expeditor Client users are limited to the applications and operating system services that you, as administrator, have configured.

The Restricted Workbench Service can only be enabled during initial installation; it can not be added to an existing installation.

The Restricted Workbench Service is available in multi-user installation environments only. To enable the Restricted Workbench Service during product installation, ensure that the **multiuser.xml** install manifest (whether using the provided version or creating your own custom manifest file) contains the information shown on this slide.

Successful launch



This slide shows a screen capture of the Expeditor Desktop client after a successful install.

After the installation completes, a shortcut to launch the platform will be created on the desktop, and on a Windows system, an entry will be added to the start menu.

Section

Desktop client configuration

The next section covers the desktop client configuration.

Eclipse workspace and configuration

- Default workspace location *<workspacedir>*
 - ▶ On Windows *<APPDATA>\Lotus\XPD*
 - Example: Documents and Settings*<userid>*\Application Data\Lotus\XPD
 - ▶ On Linux *<HOME>/Lotus/XPD*
 - Example: /home/*<userid>*/Lotus/XPD.
- Default configuration location
 - ▶ *<workspacedir>/config*
- Workspace and configuration location can be changed with command line options

Each user has a workspace where user-specific applications and configuration data are kept. The location of the user workspace and details can be found in the system administration guide. In the users workspace is a .config directory where the configuration data is located, including the rcinstall.properties file. The default location of the workspace and configuration location can be changed with command line options, information on changing these locations is found in the system administration guide.

Configuration – rcinstall.properties

- Provides configuration information used by the launcher to start the Java code
- Default required info provided during installation
- File can be edited to define Java system properties, additional library paths, VM arguments, and more

The rcinstall.properties file contains configuration information used by the launcher to start the platform. This file can be edited to define Java system properties, vm arguments, additional library paths and more. This is documented in the system administration guide.

Configuration – Platform launcher

- You can configure additional arguments when the Expeditor client is launched
 - ▶ For example you can specify to start the console
 - ▶ `<install dir>/rcp/rcplauncher.exe –console`
- See the System Admin Guide under “Configuring the platform launcher” and “Updating the rcplauncher.properties” file for more information.

You can configure additional arguments to use when the user launches the Expeditor Client. For example, you can specify that a console displays when launching the client.

Logging – Platform launcher

- Launcher output
 - ▶ does not go to the platform log
 - ▶ goes to rcplauncher.log in the logs directory
 - ▶ log is empty if a normal launch
 - ▶ log will contain information if
 - -debug argument specified
 - fatal error occurs while launching the platform
- Fatal error occurs before the creation of the log
 - ▶ Output is written to:
 - /tmp/rcplauncher.log on Linux
 - %TEMP%/rcplauncher.log on Windows

When debugging a problem with the launcher, it is important to note that the launcher output does not go to the platform log, it is written to rcplauncher.log in the logs directory.

Configuration – Platform launcher Dcommands

- Use Dcommands when you need to forward a command to a plug-in from a desktop command line
- To activate the command, launch the platform with
 - ▶ `rcplauncher.exe -my.plugin#extld.my_command.`
- The daemon thread listens for commands while the platform is running
- The command will be forwarded to the plug-in
- See the `com.ibm.rcp.daemon` package for more information

Use Dcommands when you need to forward a command to a plug-in from a desktop command line.

Configuration – rclauncher.properties

- The rclauncher.properties file is managed through install handlers.
- It contains properties that are required by the launcher for global actions.
- Without correct values in this file the platform will not start. Any other properties in this file will be ignored. This file should not be modified except through install handlers.
- File locations:
 - ▶ <install dir>/rcp/rclauncher.exe
 - ▶ <install dir>/rcp/rclauncher.properties

The rclauncher.properties file contains properties that are required by the launcher for global actions.

Without correct values in this file the platform will not start. This file should not be modified except through install handlers.

Location of this file is in the install directory where the rclauncher executable is located.

Configuration – plugin_customization.ini

- Sets the default value of preferences used on the system
- The plugin_customization.ini file resides in the <install dir>/rcp directory.
- The current settings in the file are:
 - ▶ com.ibm.rcp.security.auth.ui.ssoEnabled=false
 - Is SSO enabled
 - ▶ com.ibm.rcp.platform.portalServerAddress=
 - Portal Server Address
 - ▶ com.ibm.rcp.platform.portalEnabled=false
 - Portal Managed Client
 - ▶ com.ibm.rcp.security.auth.ui.ssoAllowed=true
 - Can the user choose to not be prompted for a password
 - ▶ org.eclipse.help.base/help_home=/org.eclipse.help.base/doc/rcp_help_home.html
 - Help home page

Next, the plugin_customization.ini file. This file sets the default value of the preferences used on the system.

The plugin_customization.ini file resides in the <install dir>/rcp directory.

These preferences include settings for whether the client is a portal managed client, the portal server address of the client, whether SSO is allowed for the client, whether SSO is enabled for the client, and what is the home help page.

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